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Ivan Macut

Argumentation of the Philosopher Franjo Šanc on the Problem of Evil in the World

Argumentacija filozofa Franja Šanca o problemu zla v svetu

Abstract: This paper[1] deals with the philosopher Franjo Šanc's reflections on the problem of evil in the world. After some introductory remarks, the second chapter briefly presents the life and main works of Franjo Šanc. The third chapter, which is also the central chapter of the article, is structured around five themes. The first theme is the basic assumption from which Šanc starts, and that is: there is a personal God, and he is the Christian God, the creator and ruler of the world. The second theme is Augustine's concept of evil as *absentia* or *privatio boni*, the framework within which Šanc reflects on evil in the world. The third theme is Šanc's central idea that in both physical and moral evil, God has a good purpose in mind, which does not always have to apply only to the individual, but can also apply to the whole world, and that evil does not necessarily exist. The fourth theme is Šanc's argument that the existence of evil is proof of the existence of God, and not the reverse, as many authors claim and advocate. The fifth theme is Šanc's answer to the question of the origin of evil. He says that evil exists for the greater glory of God. The conclusion of the paper briefly recapitulates Šanc's philosophical thought and presents the author's conclusion that his philosophical position is acceptable to Christians, but not to those who are not familiar with Christianity.

Keywords: God, philosophy, Franjo Šanc, Christian theism, problem of evil

Povzetek: Prispevek obravnava razmišljanja filozofa Franja Šanca o problemu zla v svetu. Po uvodnih opombah drugo poglavje na kratko predstavlja življenje in glavna dela Franja Šanca. Tretje poglavje, ki je tudi osrednje, sestavlja pet tem. Prva tema je osnovna predpostavka, iz katere Šanc izhaja, in sicer: obstaja osebni Bog – to je krščanski Bog, stvarnik in vladar sveta. Druga tema je Avguštinov koncept zla kot *absentia* ali *privatio boni* – okvir, znotraj katerega Šanc razmišlja o zlu v svetu. Tretja tema je Šančeva osrednja ideja, da ima Bog tako v fizičnem kot moralnem zlu v mislih dober namen, ki se ne nanaša vedno le na posameznika, am-

[1] This article is the result of research on the project "New Topics in Croatian Philosophy from 1874 to 1945", IP-2022-10-5438 funded by the Croatian Science Foundation.

pak lahko velja tudi za celoten svet – in da zlo ne obstaja neizogibno. Četrta tema je Šančev argument, da je obstoj zla dokaz za obstoj Boga in ne obratno, kot trdijo mnogi avtorji. Peta tema je Šančev odgovor na vprašanje o izvoru zla: pravi, da zlo obstaja za večjo slavo Boga. V zaključku je na kratko povzeta Šančeva filozofska misel in predstavljen avtorjev sklep, da je njegovo filozofsko stališče sprejemljivo za kristjane, ne pa tudi za tiste, ki s krščanstvom niso seznanjeni.

Ključne besede: Bog, filozofija, Franjo Šanc, krščanski teizem, problem zla

1. Introduction

It is not uncommon to witness a plethora of malevolent and distressing phenomena on a daily basis. This naturally gives rise to the question of its origin, its purpose, and, in the context of a benevolent and omnipotent God, its justification. "The question of the compatibility of suffering of the innocent and the idea of a benevolent God has been a significant point of contention within Christian thought since its inception. Consequently, it has consistently sought to provide a comprehensive and coherent response to the dilemma posed by evil to the Christian faith, both in its philosophical and theological manifestations." (Tovlajčić 2023, 14)

One of the philosophers who addressed this issue, among others, was Franjo Šanc, a Slovenian-born Jesuit. The concept of the Christian God prompts the individual to engage with the most challenging questions of human existence, including the question of evil. In addressing this question, Šanc demonstrated considerable courage and presented insights and proposals derived from centuries of Christian theological and philosophical reflection. Given the paucity of research conducted on Šanc's philosophical work and the dearth of evaluations of that research, we are confident that our study will make a contribution to the field.

In order to provide an introduction to the philosopher Franjo Šanc and his most significant published philosophical works for readers who may be unfamiliar with him, the initial chapter offers a concise overview of his life trajectory and a list of his most notable works. Subsequently, the following chapter was dedicated to the central aspect of this research, which was presented in a systematic manner in five points. In conclusion, we present our observations regarding the philosophical reflection of Franjo Šanc on the relationship between the existence of God and evil in this world.

2. A Brief Introduction to the Philosopher Franjo Šanc: His Life and Work

Franjo Šanc, a Slovenian-born philosopher, was born in Javornik nad Laškim, Slovenia, on 2 February 1882. He completed his secondary education in 1902. Subsequent to his graduation from secondary school, Šanc proceeded to pursue his

tertiary education at the university level. He commenced his studies in Maribor and entered the Jesuit order in 1903. He undertook studies in philosophy in Bratislava (1906–1912), theology in Innsbruck (1912–1915) and at the Pontifical Gregorian University in Rome (1922–1924) (Štivić 2022, 1055). From 1920 onwards, Šanc was also a professor of philosophy at the recently established Jesuit College in Zagreb, Croatia. In addition to his role at the Jesuit College in Zagreb, Šanc also taught philosophy at the Vrhbosna Theological Seminary in Sarajevo (Bosnia and Herzegovina) during the 1919/1920 academic year and from 1924 to 1937. On 21 September 1937, the philosopher Šanc finally relocated to Zagreb, where he proceeded to pursue his active teaching career and fruitful philosophical endeavours. The philosopher, priest and Jesuit Franjo Šanc passed away on 31 January 1953 in Zagreb (Macut 2018, 266–267).

During his lifetime, Šanc published a substantial corpus of philosophical works, including several books and a considerable number of articles. These were primarily disseminated in the philosophical journal *Život*.

In the field of bibliography, the following books by the author are listed: *Sententia Aristotelis: de compositione corporum e materia et forma in ordine physico et metaphysico in elementis terrestribus considerata; solutio eorum quae in primis ab E. Zeller Aristoteli opponuntur* (1928);[2] *The Creator of the world, his existence and nature, and his relationship to the world*;[3] *History of Philosophy, Part I: Philosophy of the Ancient Greeks and Romans*;[4] and finally, *History of Philosophy, Part II. From the Renaissance to Kant*.[5]

In this section, we will provide a representative sample of the most significant philosophical and scientific articles published by Šanc: "Positivism – the source of modern misconceptions";[6] "The Creator of the World and the Problem of Evil";[7] "Militant atheism – its methods and means";[8] "The philosophy of militant atheism";[9]

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[2] Franjo Šanc, *Sententia Aristotelis: de compositione corporum e materia et forma in ordine physico et metaphysico in elementis terrestribus considerata; solutio eorum quae in primis ab E. Zeller Aristoteli opponuntur* (Zagreb: Hrvatska Bogoslovska Akademija, 1928). Miljenko Belić states that, according to Šanc's own testimony, this work was so innovative and unconventional that even two reviewers, Dr. Aleš Ušeničnik (1868–1952) and Dr. Karlo Grimm (1898–1952), declined to respond to the invitation to provide their assessment. Consequently, the requisite favourable opinion was authored by professors from the Pontifical University of Rome at Gregoriana (Belić 1994, 453-454).

[3] Original title in Croatian language: Franjo Šanc, *Stvoritelj svijeta njegova egzistencija i narav i njegov odnos prema svijetu* (Sarajevo: Nova tiskara Vreček i dr., 1935).

[4] Original title in Croatian language: Franjo Šanc, *Povijest filozofije. I. dio: Filozofija starih Grka i Rimljana* (Zagreb: Knjižnica Života, 1942).

[5] Original title in Croatian language: Franjo Šanc, *Poviest filozofije II. dio. Od renesanse do Kanta* (Zagreb: Knjižnica Života, 1943).

[6] Original title in Croatian language: Franjo Šanc, Pozitivizam – izvor modernih zabluda, *Život* 9 (1928), no. 2:4–81.

[7] Original title in Croatian language: Franjo Šanc, Stvoritelj svijeta i problem zla, *Život* 13 (1932), no. 3:122–129.

[8] Original title in Croatian language: Franjo Šanc, Borbeni ateizam – njegove metode i sredstva, *Život* 18 (1937), no. 5:201–217.

[9] Original title in Croatian language: Franjo Šanc, Filozofija borbenog ateizma, *Život* 18 (1973), no. 3:97–108.

"Friedrich Wilhelm Nietzsche. On the fortieth anniversary of his death",[10] "Hans Driesch – about the origin of every philosophy";[11] "Hans Driesch – about the fundamental theses of his philosophy" – article in two parts.[12] Additionally, he engages in the rigorous examination and critique of dialectical materialism, as evidenced by his published series of articles on this subject: "At the sources of dialectical materialism";[13] "Dialectical materialism";[14] "Philosophy of Marxism"[15] , etc.

3. Analysis of the Concept of Evil and Its Resolution in the Philosophical Thought of Franjo Šanc

In his philosophical article entitled "The Creator of the World and the Problem of Evil", published in 1932, the Jesuit and philosopher Franjo Šanc considers the problem of evil in the context of reflection on the existence of God and the relationship between God – the Creator and evil. Subsequently, he published this philosophical article in a somewhat abridged form as part of a book entitled *The Creator of the World*, in a chapter entitled "The Creator and the Problem of Evil".

3.1 The Fundamental Premise: A Personal God Exist

In his reflections on the problem of evil, the philosopher Šanc begins with the assertion and philosophical conviction that God exists as the starting point and framework from which he proceeds to develop his argument. The philosopher Šanc presents a series of critiques and objections to a number of positions and claims pertaining to the existence of a God. Such views include the assertion that God is unknowable and the notion that God is an impersonal entity, as postulated by pantheists[16] , etc. Conversely, Šanc endorses and promotes the Christian theistic concept of God as a personal entity, a benevolent creator of the universe.[17] He also dismisses all other positions regarding the nature of God as untenable. It is

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[10] Original title in Croatian language: Franjo Šanc, Friedrich Wilhelm Nietzsche: Uz četrdesetu godišnjicu njegove smrti, *Život* 21 (1940), no. 8:363–385.

[11] Original title in Croatian language: Franjo Šanc, Hans Driesch – o ishodištu svake filozofije, *Život* 20 (1939), no. 7:401–411.

[12] Original title in Croatian language: Franjo Šanc, Hans Driesch – o temeljnim tezama svoje filozofije, *Život* 20 (1939), no.8:467–476; Franjo Šanc, Hans Driesch – o temeljnim tezama svoje filozofije, *Život* 20 (1939), no. 9-10:545–565.

[13] Original title in Croatian language: Franjo Šanc, Na izvorima dijalektičkog materijalizma, *Život* 18 (1937), no. 8–9–10:420–433.

[14] Original title in Croatian language: Franjo Šanc, Dijalektički materijalizam, *Kršćanska škola* 41 (1937), no.7–8: 93–99.

[15] Original title in Croatian language: Franjo Šanc, Filozofija marksizma, *Hrvatski socijalni tjedan* 3 (1939):75–88.

[16] "It would be a profound detriment to humanity and a significant setback for global progress if pantheism were to gain widespread acceptance as a dominant religious tradition." (Šanc 1935, 22)

[17] Šanc writes: "It is a profound source of joy for us to know that the Creator of the universe loves us. Given that we are human, it stands to reason that His love for us must also be immense." (Šanc 1931a, 332)

noteworthy that Šanc constructed his arguments regarding the theistic God on the foundation of Aristotle's philosophical principles, or more accurately, on his own interpretation of those same principles. In the opinion of Šanc, it was Aristotle who, in his writings, advanced the position that he was convinced of the existence of God and that there existed no possibility of there being more than one deity in addition to the one God.[18] Šanc's interpretation of Aristotle's Unmoved Mover is such that he posits the existence of a true, personal, and living God,[19] as opposed to a pantheistic deity (Šanc 1935, 30–33). In examining the tenets of Aristotle's philosophy, Šanc reaches the following personal conclusion:

> "We have examined the principal chapters of Aristotle's doctrine of God. It was not the intention of this study to present a comprehensive account of all the questions in detail. From this outline, it is evident that Aristotle, arguably the most influential philosopher in history, arrived at the conclusion that there is a God through a process of scientific inquiry, independent of any revelation. Aristotle postulated that this God is a singular entity, a living, personal, and purely spiritual being. This entity is the cause of all that occurs or changes in the universe and is, itself, unchanging. The entire universe depends on this God, who governs it as a father governs his family or a commander governs his army. This God is the purpose of the entire universe. Aristotle's doctrine of God can be characterised as scientific theism." (Šanc 1935, 35)[20]

Given that the philosopher Šanc is unequivocally aligned with the Christian theistic perspective on the nature of God as the creator of the world and the source of love (Šanc 1935, 17), it is evident that he also addresses the question of evil within the confines of this assumption.

3.2 Framework of Reflection: Evil as *Absentia* or *Privatio Boni* (Augustine)

Šanc is aware that the issue of evil in the world is one that has been the subject of philosophical debate since ancient times. Setting aside considerations of reli-

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[18] In his analysis of Aristotle's understanding of the divine, Šanc posits that: "/.../ The greatest philosopher of all time, unaided by revelation, arrived at a scientific understanding of the true, living, personal God. This God is the foundation of the entire world, to whom the world is dependent. The philosopher viewed God as the father of a family and the commander of an army. Furthermore, the philosopher saw God as the purpose of the entire world." (Šanc 1924, 32)

[19] In one place, Šanc writes: "It follows that an uncaused cause must exist, with the reason for its existence inherent in its essence. It follows that the concept and definition of this first cause encompasses existence and, consequently, individuality. It thus follows that the essence of the first cause cannot be conceived as one among many, but rather as a singular entity." (Šanc 1931b, 210)

[20] It should be noted that there are alternative interpretations of Aristotle's philosophy. For example, the American philosopher and theologian Diogenes Allen explicitly states in his work *Philosophy for Understanding Theology* that Aristotle's first cause or first mover (also referred to as the unmoved mover) is the most perfect and supreme being in the universe. However, it is important to note that this being is not external to the universe, but rather a constituent part of it. The existence of this phenomenon can be inferred from the observation of motion on Earth and in the cosmos (Allen and Springsted 2023, 17).

gion, Šanc is convinced that the issue of evil in the world can be resolved through philosophy. This can be achieved by answering the following question: if the Creator is the source of every being, the absolute master of the world, omnipotent and wise, love and goodness without end, how is it possible for evil to exist? (Šanc 1932, 122). The foundation of Šanc's response is the philosophical tenets espoused by St. Augustine following his rejection of Manichaean doctrine and its associated teachings on the existence of evil (1935, 113).[21] Šanc posits that the following opinion is erroneous: if God is the creator of all that exists outside of him, then evil in the world is not possible. Alternatively, if evil in the world is a reality, then it follows that God is not the creator of all that exists outside of him. The issue for Šanc in this assertion is the concept of evil as a tangible entity. He is unequivocal in his rejection of this notion, citing the tenets of Zoroastrian and Machiavellian thought as the basis for his stance. In his analysis of the concept of evil, Šanc draws upon the teachings of St. Augustine to argue that evil is a lack of perfection, or a deficiency in the quality of being. This implies that evil cannot be considered a fully actualised entity in itself. Additionally, another prominent Christian theologian, St. Thomas Aquinas, posits that evil is not a tangible entity or intrinsic quality. By aligning with the perspectives of both Augustine and Thomas Aquinas, our philosopher, Šanc, draws a logical conclusion: "It can be reasonably deduced that the term 'evil' signifies the 'absence of good' (*absentia boni*), or, as he subsequently posits, the 'deprivation of good' (*privatio boni*). Consequently, evil can be defined as a deficiency inherent to a given entity, manifesting as a lack of that which it ought to possess." (114)[22] Šanc posits that a thing that lacks something it should possess is not inherently evil; rather, it is the absence of a quality that is morally reprehensible. In this context, it is essential to differentiate between an evil thing and the quality of evil, or a thing and its moral turpitude. Although a material entity may be designated as "material evil" (*malum materialum*), the concept of evil can be defined as "formal evil" (*malum formale*) (1932, 123).

3.3 Central Idea: In Both Physical and Moral Evil, God Has a Good Purpose in Mind That Does Not Always Have to Apply Only to the Individual, but Can Also Apply to the Entire World, and Evil Does Not Necessarily Exist

If it is indeed the case that evil is not a tangible entity, nor can good be the catalyst for evil, but rather, it signifies the absence of something that a being should inherently possess, an even more complex question than that of the genesis

[21] In his work on St. Augustine, the patristic scholar Marijan Mandac, an expert on the thought of St. Augustine, addresses the subject of evil in depth: "Augustine was profoundly and meticulously engaged with the question of the genesis of evil, or malum, within the world. For him was very hard to identify the root cause and sources of evil. /…/ One of the reasons Augustine converted to Manichaeism was because it offered a solution to the problem of evil. The doctrine posited the existence of an eternal malevolent principle. It is posited that this entity created the fundamental substance from which all evil is believed to originate. It became for him evident that this doctrine could not be upheld in a logical and reasonable manner." (Mandac 2019, 111)

[22] Philosopher Tovlajčić correctly writes: "His insights constituted the foundational framework for all subsequent generations of Christian thinkers in their examination of evil." (Tovlajčić 2023, 15)

of evil now emerges. This leads to the question of whether, if the Creator is the source of all beings, it follows that no being can exist without the qualities that it should possess. This raises the question of how an individual can commit a sin. The question thus arises as to how such a being can become subject to eternal suffering? (Šanc 1935, 114–115)

Before moving on to the search for an answer in the *Summa Theologiae* of St. Thomas Aquinas, Šanc emphasizes that it is necessary to be careful and understand that this is not a question of why God must send misery and suffering upon his creatures but rather that he can do it. Specifically, while some argue that evil is an inherent aspect of the world, Šanc believes this perspective is unduly problematic in the context of addressing this issue in a comprehensive manner (115). In this section, Šanc begins by referencing the thoughts of St. Augustine, as presented in his work *Enchiridion ad Laurentium sive De fide, spe et charitate*. In the eleventh chapter, right at the very beginning, St. Augustine states the following: "The Almighty would not – even unbelievers admit this writing that God possesses the highest power over realities – because He is the best being, in any way allow any evil to be found in His works if He were not so strong and good that He could turn evil into good." (Augustin 1990, 164)

In his *Summa Theologiae*, St. Thomas Aquinas addresses the concept of divine providence. Šanc also draws upon this line of reasoning. In his work, Šanc makes reference to St. Thomas, stating that it is God's providence to manage things according to their purpose and above all, the good that exists in things themselves is the perfection of the whole world. This would not exist if all the degrees of being were not found in beings. It can therefore be posited that the providence of God is responsible for the creation of all degrees of being (Šanc 1935, 115–116). In this context, Šanc places emphasis on the idea that God's action is free and not a matter of necessity. This is because he presents a critique of Leibniz's optimism, which, as is well-known, posits that this world is the best of all possible ones.[23] The argument that God necessarily creates a world that would be the most perfect possible is not regarded as convincing by the philosopher Šanc (1932, 125).

In reflecting on these problems and starting from the fundamental assumption that there is a personal God, Šanc arrives at a point where he is compelled to pose the central question and provide a meaningful response. The question thus arises as to how a personal God could will evil? The fundamental premise upon which Šanc's line of reasoning is based is the assertion that evil exists as a consequence of God's will. This implies that, were it not for the divine will, evil would not exist.

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[23] In another paper, Šanc demonstrates, firstly, a comprehensive familiarity with Leibniz's philosophy and, in particular, his teachings on optimism. Secondly, he presents a compelling argument for rejecting this doctrine. In addition to other considerations, Šanc posits that Leibniz's optimism is predicated on the fallacious assumption that God invariably elects the optimal order and that God inherently desires the best for all. Consequently, Leibniz's optimism is founded upon his subjective comprehension, particularly upon the erroneous philosophical premise that God is bound to select the optimal option amongst all possible alternatives. This assumption is erroneous insofar as it posits that God is bound by the necessity of creation; rather, it is a free act. Given that He is infinitely perfect and that His happiness is unchanging, it follows that nothing can increase or diminish it. (Šanc 1934, 145)

Šanc is aware of the gravity of this issue and here he draws upon the previously mentioned philosopher and theologian St. Thomas Aquinas and his work *Summa Theologiae*. If we accept the assertion that evil can be defined as a lack of something that, by its very nature, should be present, then it follows that evil always presupposes a subject that has its nature or essence and, consequently, its essential perfection and goodness. However, the same thing, in addition to essential perfection, can also have numerous accidental perfections that are not necessarily related to each other a way that one accidental perfection could not exist without another accidental perfection. In conclusion, Šanc posits that a thing must possess its essence, as without it, the thing would be devoid of existence. As St. Thomas Aquinas, Šanc also posits, the subject of evil is always and necessarily some good. In this context, the concept of evil can be considered as an object of both human and divine will. However, the underlying reason or motive for this will is not inherently evil, but rather a manifestation of a positive force that is intertwined with the negative aspect. Šanc concludes: "If God wants us to have defects, pain, illness, ignorance, and even to have to die, God only has in mind good what is connected with these various kinds of evil." (1935, 117)

It is a well-established concept in moral philosophy that there is a distinction between physical evil and moral evil. In the context of physical evil, the term is used to describe a range of physical defects and illnesses. It is possible for God to will physical evil for the sake of some good. In this instance, Šanc makes reference to the writings of St. Thomas, who states: "And therefore God is the originator of evil, which is punishment, but /…/ he is not the originator of evil, which is guilt." (1990, 352) In the context of moral evil, Šanc makes a clear distinction between sin and divine will. He asserts that God cannot will sin, as this would be a contradiction in terms, given that it would entail willing what He has forbidden. However, like physical evil, sin can be associated with some good, and then God may allow it or not prevent it for the sake of the good (Šanc 1935, 118). In this context, our philosopher Šanc makes the following significant observation: "It can be posited that there is a benevolent intention underlying every malevolent act, whether physical or moral in nature. However, our limited cognitive abilities render us incapable of discerning the precise purpose behind each occurrence /…/." (1932, 126) Šanc proceeds to cite the views of St. Augustine and St. Thomas, who align with the former's perspective. They posit that, from an individual's standpoint, and in view of inherent constraints, the world may appear to be devoid of any discernible order. Similarly, the prevalence of malevolence in the world may lead an individual to perceive a lack of order. Šanc, drawing upon the insights of St. Thomas Aquinas, asserts that this assertion is erroneous because the perfection of the universe necessitates the existence of entities within it that are capable of losing their inherent goodness, and on occasion, do indeed do so. Evil, in its essence, can be defined as the loss of goodness (1935, 119).

The following key issue that Šanc addresses is the question of whether the good achieved through evil is always of an individual nature, or whether it can also apply to a larger number of people, or even to the entire world? For Šanc, the answer

is this: the good that God wants to achieve or for which he allows some evil does not have to be an individual good in every single case for the benefit of some single created being. Some evils may also be for the benefit of the whole world (119). In conclusion, Šanc presents his argument from a theological perspective: "Once the blessed vision is initiated, God will reveal the intricacies of His providence to us. We will then perceive that God's will was always benevolent, despite our initial perception that His providence was absent." (1932, 127)

Šanc points out that evil does not necessarily exist. God is free, either in creating the world or in choosing order in the world. The concept of moral evil or sin would not exist in the world if human beings did not engage in sinful actions. Therefore, God necessarily prohibits moral evil. In the case of physical evil, however, it is not sufficient to view it as a mere punishment for sin. It is equally plausible that God intends evil for the sake of some other good. (1935, 119–120)

3.4 The Existence of Evil as Proof of God's Existence

Philosopher Šanc, after presenting the answers and basic premises to the question of the existence of God, evil, etc., posits that the question of evil, despite being an exceptionally challenging issue within the context of the Christian theistic understanding of God, can be regarded as evidence for God's existence. One might designate it as evidence from the existence of evil in the world. The argument of the existence of evil in the world is often employed by scientists, philosophers and others as evidence that God cannot exist, or that a good and omnipotent God cannot exist if he simultaneously allows evil in the world. However, philosopher Šanc puts forward an opposing viewpoint, namely that the existence of evil in the world is proof that God also exists. "The existence of evil in the world is contingent upon the assumption of a supreme Being who is responsible for the creation and governance of the universe. This Being, must be served by evil in order to achieve the purpose for which it was created." (1935, 120) In accordance with Šanc's perspective, this entity is identified as the Christian God.

The same philosopher argues that it is erroneous to infer from the premise that God is infinitely good and omnipotent that God is therefore obliged to protect humankind from all evil. Nevertheless, the attributes of God extend beyond goodness and omnipotence. Furthermore, it can be posited that God is also infinitely wise. Even in situations where we, as limited beings, perceive only evil, it is possible that God can achieve good. To substantiate his viewpoint, Šanc once more cites St. Thomas Aquinas, who, in a similar vein, posits that one should differentiate between an individual who prioritises a singular entity, namely humanity, and one who encompasses the entirety of the universe, that is to say, God.[24] While humanity endeavours to eradicate imperfections in all things, God permits the existence of such flaws in order to facilitate the greater good (121).

[24] Similarly, in the work entitled *Providence of God*, Šanc posits that God, by virtue of his omnipotence, governs both the minutiae of individual beings and the entirety of the universe (Šanc 1939, 31).

3.5 The Solution to the Question of the Existence of Evil: Evil Exists for the Greater Glory of God

In conclusion, considering Šanc's preceding arguments concerning the problem of evil, he presents a definitive response to the question of why God permits suffering and evil. It is evident that Šanc was aware of the numerous potential philosophical perspectives on the question of God's permission of suffering and evil. However, as a Christian philosopher, Šanc adheres to a solution that is consistent with the tenets of Christian theology concerning the nature of God and the world. In accordance with the insights articulated by the philosopher Otto Zimmermann in his work *Warum Schuld und Schmerz*?, Šanc posits that the existence of suffering is a necessary condition for the manifestation of God's eternal glory and our own eternal joy (1935, 121).[25]

This solution for Šanc is, firstly, in complete harmony with Christian philosophy, which is the epitome of philosophical truth,[26] and secondly, it is in complete harmony with the Christian faith as expressed either in the Holy Scriptures or at the First Vatican Council in the dogmatic constitution "Dei Filius" (24 April 1870). The concept of God as the creator of heaven and earth represents a fundamental tenet of Christianity. The nature of God is perceived as immeasurable and benevolent, manifesting as a caring entity for all creation (Šanc 1935, 121).

4. Conclusion

It can be argued that the work of philosopher Franjo Šanc, which encompasses both philosophical works and philosophical reflections, situates him within the canon of 20th-century neo-scholastic philosophers. A comprehensive examination of his oeuvre reveals that he is a philosopher who is perspicacious in formulating questions and meticulous in articulating his arguments. He offers a rebuttal to opposing perspectives while simultaneously defending his own philosophical stance. Furthermore, he demonstrates a comprehensive understanding of both foreign and domestic philosophical literature pertinent to the subjects he discusses.

In addressing the question of the existence of evil, Šanc evinces a commendable familiarity with the subject matter. As has been demonstrated, he addresses the issue in a comprehensive and systematic manner, guiding the reader through

[25] In reflecting on the work *Warum Schuld und Schmerz?*, theologian Josip Pazman write as follow: "It would be a fallacy to assume that evil is an inherent aspect of the world. Rather, it is our responsibility to engage in critical thinking and recognise that the malevolent actions observed in this world are not in opposition to the principles of goodness and holiness espoused by the divine. Furthermore, it is imperative to acknowledge that this order in the world is God's benevolence, for which we should be grateful and utilise it to our advantage." (Pazman 1918, 188)

[26] For Šanc, there is no doubt that true philosophy is possible and that this is exemplified by scholastic philosophy, which is in accordance with the Christian faith. "The Church thus asserts that scholastic philosophy represents the genuine philosophical tradition. Consequently, those who adhere to the tenets of the Church are obliged to accept scholastic philosophy as the sole authentic philosophical system." (Šanc 1944, 188)

a step-by-step process towards his own, specifically scholastic and ecclesiastical position. In consideration of the aforementioned argument, it is reasonable to conclude that it is rooted in the Christian philosophical tradition of St. Augustine and St. Thomas Aquinas. Moreover, by underscoring the notion that the glory of God emanates from evil and suffering, Šanc will undoubtedly fail to resonate with those who do not accept Christianity as a source of answers to fundamental human questions. In other words, it will be challenging to persuade an individual who is not a Christian of the veracity of their position through rational argumentation alone. In this argument, we identify a certain limitation in the author's line of reasoning and justification of the existence of evil in the world. This response will undoubtedly resonate with those of the Christian faith, who will readily accept it as it aligns with the entirety of God's revelation. For those who do not adhere to Christianity, it is not implausible to conclude that the Christian concept of God may not align with the notion of absolute benevolence and love, as espoused by Christians.

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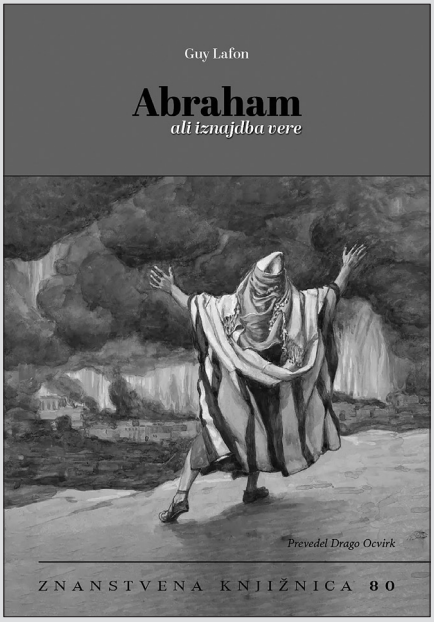

Guy Lafon

Abraham ali iznajdba vere

O Abrahamovem zgodovinskem obstoju ne vemo ničesar. Toda njegovo duhovno potomstvo je ogromno in tisti, ki so povezani z njegovim imenom, »so tako številni kakor pesek na morskem obrežju«. Judje, kristjani in muslimani se sklicujejo nanj: za monoteiste je »oče vernikov«. Svetopisemske pripovedi, ki govorijo o njem, so med najbolj znanimi: odhod iz Ura na Kaldejskem v deželo, ki jo je obljubil Bog, neverjetno Izakovo rojstvo in njegovo žrtvovanje, prikazanje Boga pri Mamrejevih hrastih, pripoved o Sodomi in Gomori.

Guy Lafon poskuša torej pokazati, kako je Abraham resnično univerzalen lik. »Bralci Svetega pisma si vedno znova prilaščajo zgodbo o Abrahamu in v njeni pripovedi črpajo tisto, kar jim omogoča, da razumejo sami sebe v družbi, sredi sveta.«

Prevod Lafonove knjige Abraham ali iznajdba vere na razumljiv ter sodoben način slovenskemu bralcu razloži, kaj je Lafonova teologija, kako razume vero in kako so medčloveški odnosi povezani z vero.

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Sonia Vaupot

Prevajalci-kleriki in *translatio studii* v srednjeveški Franciji

Cleric Translators and the Translatio Studii *in Medieval France*

Povzetek: Članek obravnava vlogo prevajalcev-klerikov pri prenosu znanja in moči v srednjeveški Franciji, pri čemer se opira na koncepta *translatio studii* in *translatio imperii*. Ti prevajalci so s prevajanjem različnih besedil prenašali znanje v srednjeveško francoščino in hkrati služili interesom cerkvenih in kraljevih institucij. Raziskava osvetljuje ideološka in politična vprašanja teh prevodov ter odpor, ki so ga sprožili. Analizira vlogo različnih mecenov, zlasti Karla V., pri spodbujanju prevajanja kot orodja za upravljanje in poenotenje znanja. V sklepnem delu sledi razvoju teh praks do konca srednjega veka, ko je prevajanje postalo orodje za širjenje znanja in zaznamovalo prehod v humanizem.

Ključne besede: prevajanje v srednjem veku, prevajalci-kleriki, *translatio studii, translatio imperii*, cerkveno prevajanje

Abstract: The article examines the role of cleric translators in the transmission of knowledge and power in medieval France, drawing on the concepts of *translatio studii* and *translatio imperii*. By translating various texts, these translators adapted knowledge into Middle French while serving the interests of both ecclesiastical and royal institutions. The study highlights the ideological and political stakes of these translations, as well as the resistance they encountered. It analyses the role of various patrons, particularly Charles V, in promoting translation as a tool of governance and knowledge unification. Finally, it traces the evolution of these practices until the end of the Middle Ages, when translation became a key instrument for the dissemination of knowledge, marking the transition towards humanism.

Keywords: medieval translation, cleric translators, *translatio studii*, *translatio imperii*, ecclesiastical translation

1. Uvod

Prenos znanja že od nekdaj temelji na prepričanju, da ga je treba ohranjati, bogatiti in prilagajati prihodnjim generacijam.[1] V srednjem veku se izraz *translatio* ni nanašal le na prevajanje, temveč tudi na širši kulturni in intelektualni prenos. Pojem *translatio studii* temelji na izhodišču, da je znanje iz antične Grčije postopoma prehajalo v Rim, nato pa ga je prevzel in preoblikoval srednjeveški krščanski svet. Rimljani so izraz *translatio* uporabljali v različnih pomenih – od retorične figure do prenosa oblasti (*translatio imperii*) –, kar razkriva tesno povezanost med prevodom in politično močjo: »osvajali so, ko so prevajali« (Nietzsche v Movrin 2010, 55), s čimer je prevajanje postalo sredstvo legitimacije Rima kot dediča grške kulture (Movrin 2010, 25). V srednjeveškem pojmovanju pa *translatio imperii* presega politični pomen. Ne označuje le prenosa oblasti, temveč ideološki koncept s tremi ključnimi vidiki: dinastično kontinuiteto, sakralizacijo oblasti in kulturno apropriacijo. V francoskem prostoru se ta trojna razsežnost uteleša v kraljevi figuri, ki že od Filipa Avgusta naprej poudarja svojo samostojnost v razmerju do nemškega cesarstva. Če se *translatio imperii* nanaša zlasti na prenos oblasti, se *translatio studii* osredinja na prenos znanja in kulturnih vzorcev.

Medtem ko srednjeveške študije poudarjajo pomen prevedenih besedil kot nosilcev kulturnega procesa, so identiteta prevajalcev-klerikov, njihovi motivi in pogoji, v katerih so ta dela nastajala, manj raziskani. Ta članek, ki temelji na zgodovinskem pristopu, njihovo vlogo proučuje preko njihovih identitet ter prevedenih ali prirejenih besedil, hkrati pa poudarja vpliv mecenov na izbiro in distribucijo del. Z analizo prevajalcev-klerikov in njihovega dela lahko intelektualna, politična in kulturna vprašanja, ki so oblikovala prevajalske prakse v srednjem veku, razumemo bolje. Kot del *translatio studii* so ti prevodi odražali željo po ohranjanju in prilagajanju znanja, prispevali k razvoju francoščine kot učnega jezika in se hkrati odzivali na smernice, ki so jih določale cerkvene in kraljeve oblasti. Prenos znanja pa ni bil omejen le na njegovo ohranjanje – vključeval je tudi njegovo strukturiranje in prilagajanje intelektualnemu in političnemu kontekstu tistega časa (na pobudo bodisi oblasti bodisi naročnikov prevodov). Prevajalsko delo klerikov se tako umešča v širši proces, v katerem se *translatio studii* prepleta s *translatio imperii*: prenos znanja pogosto spremlja prenos politične in simbolne moči. Zato prevajanje v srednjeveškem kontekstu ne pomeni zgolj jezikovnega prenosa, temveč tudi orodje za utrjevanje kulturne in politične avtoritete. Analiza bo potekala kronološko in pokazala, kako so prevajalci-kleriki s svojim delom soustvarjali srednjeveški francoski intelektualni prostor.

2. *Translatio* med znanjem in oblastjo

Claudio Galderisi meni, da je zgodovina *translatio studii* »predvsem stvar intelektualnih skupnosti: neposrednega srečanja med dvema civilizacijama, ki ju v tem

[1] Prispevek je nastal v okviru raziskovalnega programa št. P6-0218, ki ga je sofinancirala Javna agencija za raziskovalno dejavnost Republike Slovenije.

primeru povezuje sorodnost jezikov.« (2011, 22) Vendar ta koncept ni omejen zgolj na prenos in ohranjanje znanja z besedili – temelji tudi na prevajanju kot sredstvu za širjenje in prilagajanje znanja. Prevajalsko dejanje zato presega zgolj jezikovni prenos in postaja del kulturne dinamike, kjer jezikovne priredbe soobstajajo z različnimi oblikami t. i. ‚preprečenega prevajanja' – ko so določena dela, ki veljajo za nezdružljiva s svojim zgodovinskim obdobjem, namerno izpuščena. Nekatera pomembna antična besedila namreč niso bila prevedena – toda ne zaradi neznanja, pač pa zaradi implicitne ali eksplicitne odločitve, da se določenih del v srednjeveško ljudsko dediščino ne vključi (Galderisi 2011, 23–24). Odsotnost latinskih prepisov *Iliade* in *Odiseje* po 5. stoletju je tako mogoče pojasnjevati ne le s slabim znanjem grščine na Zahodu, temveč tudi z omejeno vključenostjo homerskih epov v srednjeveško krščansko kulturo (Coumert 2005, 330). Pojem *translatio studii* tako označuje postopen prenos znanja skozi čas in jezik. Temelji na številnih dejavnikih – od intelektualnih in ideoloških odločitev prevajalcev do materialnih omejitev pri širjenju besedil ter tudi odpora, značilnega za učenjaške kroge. Prevajanje poleg jezikovnega prenosa oblikuje in bogati znanje.

Z razvojem *translatio studii* prevod ni bil več le orodje za zvesto posredovanje preteklosti, temveč je postal sredstvo prirejanja in inovacij. V Rimu se je ob tem razlikovanju že pojavilo vprašanje, v kolikšni meri je treba besedilo prirediti, da bi bilo dostopno v drugem jeziku. Tudi sveti Hieronim pri svojem uvodu v Sveto pismo poudarja, da ne prevaja besede za besedo (*verbum pro verbo*) – razen v Svetem pismu, kjer je vrstni red besed doktrinarnega pomena. Hieronim je pogosto sledil načelu prevajanja pomena za pomen (*sensus de sensu*), pri čemer je izhajal iz filološkega razumevanja tako besedilnega kot duhovnega pomena svetopisemskega izvirnika (Krašovec 2021, 457–460). Tako imajo prevajalčeve odločitve glede izbire, priredbe ali izpuščanja pri prenosu in sprejemanju znanja znotraj različnih kulturnih tradicij pomembno vlogo (Cassin 2004, 1315). Venuti opozarja, da je nevidnost prevajalca pogosto posledica sistematičnega izbrisa njegovih interpretativnih posegov, kar zlasti velja za cerkvene prevajalce, ki so delovali v okviru institucionalne avtoritete (Venuti 1995, 17–19). Pri svetopisemskem prevajanju Krašovec izpostavlja, da biblična imena in pojem »ime« nosijo izrazito simbolno vrednost: njena obravnava v prevodih lahko razkrije ideološke usmeritve (Krašovec 2022, 852–854).

Translatio studii je tesno povezan tudi s *translatio imperii*, saj prenos znanja pogosto spremlja prenos moči. Prenos znanja je bil v interesu duhovščine in institucij, ki so nadzorovale dostop do njega. Srednjeveško prevajanje ni bilo zgolj jezikovni prenos, temveč je vključevalo selektivno prilagajanje besedil doktrinarnim in kulturnim zahtevam časa (Galderisi 2011, 26). Od Grčije do Rima – in nato od Karolinškega cesarstva do srednjeveških kraljestev – je kroženje znanja vseskozi sledilo vzponu imperijev. Movrin (2010, 24–25) poudarja, da je bil prenos znanja hkrati legitimizacija prenosa oblasti, saj je s prevajanjem vsak imperij potrjeval svojo vlogo dediča prejšnjih. Podoben vzorec se ponavlja tudi pozneje. Vsak imperij je podedoval in prejšnje znanje reinterpretiral v skladu s svojimi ambicijami in zgodovinskim kontekstom, zato je prevajanje postalo pomemben instrument kulturne in politične konstrukcije (Oustinoff 2007, 28). Čeprav prevodi Svetega

pisma in teoloških besedil že dolgo igrajo osrednjo vlogo, pa so imeli pri prenosu znanja v okviru *translatio studii* pomembno vlogo tudi drugi prevodi. Poleg svetopisemskih besedil so se namreč na pobudo cerkvenih in kraljevih mecenov prevajala tudi številna duhovna, doktrinarna in intelektualna dela. Ne glede na to, ali so ti prevodi vključevali hagiografske zapise, svetopisemske interpretacije ali filozofska razmišljanja, so odražali tudi strateške odločitve, povezane z doktrinarnimi, pedagoškimi ali političnimi zahtevami. Eden od njihovih ciljev je bil zagotoviti določeno enovitost besedišča in sloga (Krašovec 2018, 489). Ta želja po jezikovni in teološki standardizaciji je značilna tudi za *translatio imperii*, kjer je prenos znanja tesno povezan z diskurzom, ki ga oblikujejo verske in politične oblasti.

3. Od karolinških začetkov do 14. stoletja

Karolinška renesansa je v Zahodni Evropi pomenila intelektualno prenovo. Od konca 8. stoletja dalje je Karel Veliki uvedel reforme za poenotenje verske kulture, pa tudi izboljšanje izobrazbe duhovščine. Tako je kapitular *Admonitio generalis* (789) odredil ustanovitev šol po samostanih in škofijah, medtem ko sta popravljanje in standardizacija svetih besedil zagotavljala enotnost liturgije. Latinščina je bila uveljavljena kot jezik Cerkve in uprave, kar je omogočilo lažje širjenje znanja. Takšna jezikovna standardizacija ni pomenila le kulturne enotnosti, temveč tudi uresničevanje *translatio imperii*, kjer je prevod postal orodje za utrjevanje cesarske oblasti (Movrin 2010, 21–22). To gibanje si je prizadevalo uskladiti in posredovati verska besedila znotraj duhovščine in samostanskih šol. Cerkev je prepisovanje in popravljanje latinskih besedil podpirala – zlasti z revizijo *Vulgate* in standardizacijo Svetega pisma. Pod vplivom Karla Velikega so bili učenjaki iz različnih evropskih regij mobilizirani, da bi izboljšali poučevanje latinščine in prenos znanja, kar je spodbudilo prvo obliko *translatio studii* znotraj latinščine. Med njimi je bil škof vizigotskega porekla, Teodorik Orleanski, ki je k tej nalogi pomembno prispeval z vodenjem prepisovanja biblijskih besedil v samostanskih skriptorijih. Posebej je bil zaslužen za nastanek komentirane različice *Vulgate,* znane kot Teodorikova biblija.

Čeprav to obdobje pomeni intelektualno prenovo, so se prevajalski napori večinoma osredotočali na popravljanje in standardizacijo latinščine, ne pa na prevod novih del. Latinščina je ostala jezik učenosti, vendar je z rastjo pisane besede v ljudskih jezikih naraščala potreba po besedilih, dostopnih laičnim bralcem. Prelomnico predstavlja leto 842 s *Strasbourško prisego*, političnim dokumentom, sestavljenim v romanščini in stari visoki nemščini, ki potrjuje obstoj jezikovne zavesti in pomeni eno prvih uradnih omemb romanščine kot jezika vsakdanje rabe. Od 11. stoletja naprej je vzpon pismene kulture v ljudskih jezikih začel spodbujati širjenje verskih besedil, prilagojenih laičnim bralcem. Kljub temu je latinščina v učenjaških, pravnih in verskih krogih ostala prevladujoči jezik vse do 12. stoletja. Prenos znanja je bil takrat večinoma odvisen od prevodov znotraj latinščine.

Od 12. stoletja naprej so se postopoma začeli širiti prevodi nekaterih posvetnih besedil iz latinščine v ljudske jezike – z namenom, da bi verniki, latinščine ki niso

znali dovolj dobro, ta besedila lažje razumeli. Med prvimi meniškimi prevodi je bilo *Zlato pismo kartuzijanom na Božji Gori* avtorja Viljema Teoderiškega, pri čemer se je ohranila različica v lorenskem narečju iz druge polovice 12. stoletja. V istem obdobju se pojavijo tudi drugi prevodi posvetnih besedil v staro francoščino. Tako so *Homilije o Visoki pesmi* opata Bernarda iz Clairvauxa v francosko prozo prevedene proti koncu 12. stoletja. Ti prevodi so bili jezikovno prilagojeni – včasih so imeli standardizirano besedišče, zlasti na območjih severne Francije, kjer so govorili t. i. oilske jezike (predhodnike današnje francoščine). Nekateri so si prizadevali zagotoviti tudi teološko doslednost, ohraniti določeno mero dobesednosti in sprejeti skupni leksikon meniških središč.

Že v 13. stoletju se je francoščina začela uporabljati širše, zlasti v literarnih in upravnih delih. Med pomembnimi prevajalci je bil kanonik Guyart des Moulins, znan po svoji adaptaciji latinske *Vulgate* v prozno obliko (*Bible historiale*), obogateno s komentarji iz dela *Historia scholastica* Petra Comestorja (Petra Jedca), teologa iz 12. stoletja. S to različico, izdelano med letoma 1294 in 1297, je želel Sveto pismo narediti bolj razumljivo, ne da bi pri tem odstopil od doktrinarnih zahtev Cerkve. Ta pristop razkriva željo, da bi širjenje nauka Svetega pisma nadgradil z razlagalnim in eksegetskim aparatom, prilagojenim bralcem.

4. Razcvet verskih in učenih prevodov v 14. stoletju

V 14. stoletju je pri prenosu in priredbi verskih besedil prišlo do občutne pospešitve. V tem obdobju se je vse več besedil prevajalo v ljudske jezike, kar so spodbujali tako vladarji kot učenjaki, ki so si prizadevali teološka dela narediti dostopna širšemu občinstvu. Ob naraščajoči potrebi po razumevanju Svetega pisma se je vse več verskih besedil prevajalo v srednjeveško francoščino – vendar še vedno pod nadzorom Cerkve. Med prevedenimi deli najdemo odlomke iz Svetega pisma, molitvenike, brevirje ter dela o morali in teologiji. Ta besedila, namenjena zlasti izobraženim laikom in klerikom, ki so odlično znali latinsko, pričajo o želji po širjenju verskih naukov med vse, ki bi želeli imeti dostop do temeljev krščanske vere, a latinščine niso razumeli. Poleg svetopisemski besedil, kot so Psalmi ali odlomki iz Stare zaveze, so se pristaši tega gibanja osredotočali še na verske kronike, svetopisemske komentarje in duhovna besedila.

Poleg tega so se začeli pojavljati specifični prevodi evangelijev in pisem, ki so jih pogosto podpirali kraljevi meceni. Ker se je pomena prevajanja za utrjevanje svoje avtoritete zavedal in želel, da bi bila krščanska besedila dostopna čim širšemu občinstvu, je francoski kralj Filip VI. Valojski prevajalske podvige aktivno spodbujal. Na bogoslužne potrebe škofij, zlasti v Parizu, kjer je bila želja po besedilih v ljudskem jeziku, prilagojenih lokalnim navadam, še posebej velika (Galderisi in Agrigoroaei 2011, 270–272), se je odzval tako, da je začel podpirati širjenje znanja. Kralj je preko svoje prve žene, Ivane Burgundske (»Ivane Hrome«), pogosto podpiral prevajalce, kot je bil Jean de Vignay, hospitalni menih reda sv. Janeza Krstnika. Jean de Vignay je naredil več prevodov, namenjenih kraljevemu dvoru. Leta

1333 je dokončal prevod *Speculum historiale* (*Zrcalo zgodovine*) Vincenta de Beauvaisa, obsežnega enciklopedičnega dela iz 13. stoletja, ki ga je verjetno naročila kraljica Ivana Burgundska. Isto leto je prevedel tudi delo *Legenda aurea* (*Zlata legenda*), ki ga je napisal Jacobus de Voragine, eno najpomembnejših hagiografskih zbirk srednjega veka – prav tako pod kraljičinim pokroviteljstvom. Poleg tega je prevedel Vegecijev vojaški priročnik *De re militari* (*O vojaških zadevah*) ter potopisne zapise Odorika iz Pordenona, zapisane okoli leta 1330 pod naslovom *Itinerarium*, ki so bili v letih 1331–1333 v francoščino prevedeni kot *Čudesa prekomorskih dežel* (*Les Merveilles de la terre d'outremer*). Jean de Vignay je svoje prevode namenjal predvsem kraljevemu dvoru, kar priča o takratnih prizadevanjih za popularizacijo znanja iz latinske in krščanske tradicije – s poudarkom na upoštevanju didaktičnih in moralnih pričakovanj tistega časa. Njegovo delo je prispevalo tudi k širšemu dostopu do besedil, ki so bila dotlej na voljo zgolj izobražencem. Tako prevajanje ni ostalo le pri prenosu besedila, ampak je postalo tudi pedagoško in duhovno orodje, ki je omogočalo hitrejše širjenje krščanskega mišljenja (Lusignan 1989, 309–310). Čeprav ti prevodi niso brez določenih slogovnih in terminoloških nerodnosti – ki odražajo takratne izzive prenosa latinskih besedil v ljudski jezik –, ponazarjajo težnjo po večji dostopnosti posvetnih in znanstvenih besedil. Obenem je to prizadevanje odgovarjalo na liturgične potrebe škofij, kjer je povpraševanje po besedilih v ljudskem jeziku, prilagojenih lokalnim praksam, naraščalo. Prevedeni rokopisi so spodbujali versko poučevanje in liturgične obrede, služili pa so tudi kot pedagoška podpora pri prenosu svetopisemskih vsebin in uvajanju širšega občinstva v vero (Galderisi in Agrigoroaei 2011, 268–278).

Okoli leta 1354, v času vladavine kralja Ivana II. Dobrega, se je benediktinski avtor Pierre Bersuire (Peter Berhorij, imenovan tudi Petrus Berchorius oziroma Petrus Bercorius) lotil prevoda dela Tita Livija v srednjeveško francoščino. Njegov prevod je obsegal prva dva zvezka in del tretjega zvezka obsežne rimske zgodovine *Ab Urbe Condita*. V predgovoru Bersuire spregovori o prevajalskih izzivih – predvsem o razliki med klasično latinščino Tita Livija in srednjeveško latinščino ter o lakoničnosti in nenavadnost nekaterih izrazov. Da bi bralcem olajšal razumevanje, je vključil glosar, v katerem je pojasnil težje in dvoumne izraze (Horguelin 1981, 31). Glosar je izboljšal dostopnost besedila in ostal pomemben referenčni pripomoček več kot dve stoletji (Monfrin 1964, 10). Prevod, dokončan okoli leta 1356 in naslovljen *Knjiga Tita Livija o rimski zgodovini* (*Le Livre de Tytus Livius de Hystoire roumaine*), odraža vse večje zanimanje za antične avtorje ob koncu srednjega veka in v renesansi.

V srednjeveško francoščino pa so bila prevedena tudi nekatera manjša dela, ki so temeljila na krščanski tradiciji. Med pomembnejšimi besedili izstopajo knjige psalmov, kot je *Lorenski psalter v prozi* (*Psautier lorrain en prose*), znan tudi kot *Meški psalter* (*Psautier de Metz*), anonimni prevod, ki je nastal okoli leta 1365. To besedilo, ki ga je zaznamoval vpliv lorenskega narečja, priča o prizadevanjih, da bi psalme prilagodili jeziku, ki bi bil razumljiv vernikom – hkrati pa ohranili izvirno liturgično strukturo.

5. Uveljavitev francoščine kot jezika znanja pod Karlom V.

Karel V., eden najvplivnejših mecenov svojega časa, je bil predan vladar. Svojih prizadevanj ni omejeval zgolj na verska besedila. V času njegove vladavine se je francoščina kot jezik znanja in političnega mišljenja uveljavila še bolj, s čimer je nastala podlaga za razcvet humanističnih prevodov v 15. stoletju (Stierle 1996, 151–152). Ker je bil prepričan, da širjenje znanja krepi kraljevsko oblast, je leta 1368 ustanovil kraljevo knjižnico v Louvru, ki je kot vladarska ustanova poosebljala povezavo med znanjem in vladanjem (Lusignan 1989, 311). V njej je zbiral latinska dela in naročene francoske prevode in tako uresničeval svojo ambicijo kraljestvu zagotoviti ustanovo, ki bi se lahko kosala z velikimi cerkvenimi in univerzitetnimi knjižnicami. Spodbujal je tudi prevajanje številnih del v ljudski jezik. Med učenjaki, ki jih je povabil na svoj dvor, je bil teolog in pravnik Raoul de Presles, ki ga je kralj Karel V. zadolžil za prevod dela svetega Avguština *De civitate Dei* (*O Božjem mestu*) v srednjeveško francoščino. Gre za eno temeljnih del srednjeveške krščanske misli. Ta pobuda je bila del kraljeve kulturne politike, ki je želela spodbujati širjenje znanja v francoščini. To besedilo, ki združuje teologijo in politično refleksijo, krepi kraljevsko oblast – tudi s poudarjanjem podobe razsvetljenega in izobraženega vladarja. V tem kontekstu je prevajanje utelešalo paradigmo *translatio imperii*: kralj je z naročenimi prevodi iz antike in krščanske tradicije oblikoval podobo Francije kot legitimne dedinje rimskega in krščanskega izročila (Movrin 2010, 24–26). Prevajalske dejavnosti v času Karla V. so bile tesno povezane z mecenstvom in politično strategijo, pri čemer so prevodi – kot je Preslesova različica *De civitate Dei* – služili kot orodje za utrjevanje kraljeve avtoritete in hkrati oblikovanje kulturne identitete (McGrady 2019, 95–97). Kot predhodnik nastajajočega humanizma je Raoul de Presles znan tudi po svojem delnem prevodu Biblije v srednjeveško francoščino, ki ga je začel okoli leta 1377 in ga posvetil Karlu V. Njegovo delo temelji predvsem na prilagoditvi in obogatitvi starejših francoskih bibličnih prevodov, zlasti iz 13. stoletja. S svojimi opombami in komentarji je Sveto pismo naredil dostopnejšo in razumljivejše za bralce, ki niso obvladali latinščine. Prenos znanja se tako ne opira zgolj na prevajanje besedil, temveč tudi na njihovo interpretacijo – in prilagajanje glede na kontekst in ciljno občinstvo.

Leta 1372 je kaplan Jean Corbechon po ukazu kralja Karla V. v srednjeveško francoščino prevedel delo Bartolomeja Angleža (Bartholomaeus Anglicus) *De proprietatibus rerum* (*O lastnostih stvari*). To delo, nastalo okoli leta 1240, je opisano kot srednjeveška enciklopedija. Bartolomej Anglež je svojo knjigo sprva namenil mladim klerikom in pridigarjem. O njenem uspehu priča približno 200 ohranjenih rokopisov ter prevodi v različne evropske ljudske jezike. Delo Jeana Corbechona je del prizadevanj prevajalcev na knežjih dvorih takratnega časa – enciklopedično znanje so želeli približati novi publiki, ki so jo sestavljali vladarji, fevdalci in premožni meščani, saj je bila splošna razgledanost obravnavana kot temelj vladanja.

Kralj Karel V. je prevod filozofskih in znanstvenih del naložil tudi škofu Nicolasu Oresmu. Eden njegovih najpomembnejših dosežkov je prevod antičnih besedil, zlasti Aristotelovih del, v srednjeveško francoščino. Med njegovimi ključnimi deli

so prevod *Nikomahove etike* (okoli leta 1370), *Politike* (okoli leta 1372) in *Ekonomike* (okoli leta 1370). Oresme se ni omejil zgolj na prevajanje – svoja besedila je dopolnjeval z glosarji, komentarji in za tisti čas inovativnim znanstvenim besediščem. Med drugim je zaslužen za širšo uporabo številnih tehničnih izrazov, kot so monarhija, demokracija, oligarhija, aristokracija ter tudi števec in imenovalec. Čeprav so nekateri od teh pojmov v latinščini oziroma grščini že obstajali, jih je Oresme prilagodil srednjeveški francoščini; s tem je pripomogel k njihovemu širjenju in k uveljavitvi francoščine kot jezika znanja.

Leta 1375 se je teolog in poveljnik reda sv. Janeza Krstnika Simon de Hesdin na kraljevo zahtevo lotil komentiranega prevoda dela rimskega zgodovinarja Valerija Maksima *Facta et dicta memorabilia* (*Spomina vredna dejanja in besede*). V uvodu se prevajalec opravičuje za morebitne netočnosti v prevodu, ki jih pripisuje težavam, povezanim s prevajanjem latinščine in s specifičnim slogom izvirnega dela. Pri prevajanju je zavzel pragmatičen pristop, pri čemer se je odmaknil od sholastične metode, osredotočene na dobesedno zvestobo latinščini, in dal prednost bolj tekočemu in bralcu dostopnemu podajanju besedila. Prevod je zaradi smrti Karla V. leta 1380 in avtorja leta 1383 ostal nedokončan. Delo je okoli leta 1400 dokončal pisatelj in prevajalec Nicolas de Gonesse na zahtevo Jeana, vojvode Berryjskega. Prva tiskana izdaja tega prevoda je izšla leta 1489.

6. Raznolikost naročnikov prevodov v 15. stoletju

V 15. stoletju so evropski dvorni krogi v prestižu tekmovali z mecenstvom in intelektualno produkcijo, kar je pomembno prispevalo k širjenju prevodov. Čeprav je imel osrednjo vlogo še vedno francoski kralj, so v mecenstvu in kulturnem ugledu tekmovali različni knežji dvorci, ki so pri širjenju prevedenih besedil aktivno sodelovali (Sot idr. 1997). V tem obdobju je k širjenju antičnih besedil v srednjeveški francoščini prispeval klerik in prevajalec Laurent de Premierfait. Na zahtevo svojih mecenov – vojvode Berryjskega in Ludvika II. Burbonskega – je leta 1409 prevedel Boccacciev *De casibus virorum illustrium* (*O nezgodah slavnih mož*). Leta 1405 je prevedel še Ciceronovo delo *De senectute* (*Pogovor o starosti*), leta 1416 pa *De amicitia* (*O prijateljstvu*). Med letoma 1411 in 1414 je nato priredil Boccacciev *Dekameron*, s čimer je pomembno prispeval k sprejemanju tega dela v francoščini.

Istočasno se je duhovnik, pisatelj in iluminator Jean Miélot dejavno vključeval v prenos verskih in zgodovinskih besedil na burgundskem dvoru. Osebni tajnik vojvod Filipa Dobrega, zatem pa Karla Drznega med letoma 1456 in 1457 je prevedel *Traktat o očenašu* (*Traité de l'oraison dominicale*), teološko delo, ki ga je naročil Filip Dobri. Miélot je priredil tudi številna verska in hagiografska besedila, med drugim življenjepise svetnikov in bogoslužne knjige. Med njegovimi najpomembnejšimi prevodi sta *Romuléon* (zgodovina antičnega Rima) Beneventa da Imole ter *Življenje in čudeži* svetega Jošta. Njegova dela odražajo avtorjev trud za širjenje svetih besedil med burgundsko elito, kar potrjuje njegovo pozitivno vlogo pri prenosu verskega in zgodovinskega znanja na burgundski dvor (Galderisi in

Agrigoroaei 2011, 495). Njegovo delo poleg tega zaznamuje prehod od iluminiranih rokopisov k prvim tiskanim knjigam. Robert Gaguin, zgodovinar in predstojnik reda Svete Trojice, je s politično in zgodovinsko vizijo začel objavljati traktate o latinski prozodiji in metriki, kot sta *Ars metrificandi* in *Ars metrica* (1477), ki pričata o njegovi jezikovni spretnosti. Med letoma 1481 in 1484 je prevedel *Historia Karoli Magni et Rotholandi* (delo je poznano tudi kot *Historia Turpini*). Po kraljevem naročilu je nato prevedel *Galsko vojno* Julija Cezarja v srednjeveško francoščino; ta prevod, natisnjen leta 1485, je dolga leta ostal referenčno delo.

Na koncu je v 90. letih 15. stoletja Jean de Rély, škof iz Angersa in spovednik Karla VIII., predelal *Bible historiale* (najbolj razširjen prevod Svetega pisma v srednjeveški francoščini), ki jo je prvotno prevedel Guyart des Moulins v 13. stoletju. Revidirana različica je bila objavljena okoli leta 1499. Gaguin je tudi avtor *Compendium de origine et gestis Francorum*, zgodovinske kronike, ki jo je dokončal leta 1499. Njegov cilj je bil Sveto pismo približati izobraženemu francosko govorečemu občinstvu, obenem pa ohranjati pravoverno perspektivo (Galderisi in Vincensini 2017, 93–96).

7. Sklep

Prevajanje v srednjeveški Franciji je imelo ključno vlogo pri oblikovanju intelektualnega in kulturnega prostora, saj ni bilo le jezikovno posredovanje, temveč orodje za prenos, prilagajanje in uveljavljanje znanja. Pred razmahom prevodov v francoščino je prenos znanja temeljil skoraj izključno na latinščini – jeziku Cerkve in izobraženih slojev. V Franciji se je *translatio studii* razvijal strukturirano: učenjaki so ohranjali in nadgrajevali znanje grško-rimske tradicije, zlasti v krščanskem kontekstu. Njihova naloga ni bila zgolj ohranjanje besedil – ukvarjali so se tudi z njihovo interpretacijo in jih prilagajali intelektualnim ter doktrinalnim zahtevam tistega časa.

Prevajalci, ki so večinoma izhajali iz samostanskih in škofovskih krogov, so skrbeli za ohranjanje in kroženje znanja ter v latinščini ali ljudskem jeziku prirejali ključna dela, katerih vpliv je segal onkraj verskega okvira. Vseeno pa nekatera antična dela – kljub temu, da so bila poznana – niso bila prevedena, saj so bila v tistem obdobju neskladna s prevladujočimi interesi. Izbira prevedenih besedil je tako sledila kulturnim in političnim merilom, ki so *translatio studii* neposredno usmerjala. Od 12. stoletja dalje se je ta dinamika začela spreminjati. Z vzponom opatij, šol in univerz je prevajanje postalo orodje za prenovo in širjenje znanja. Prevajalci-kleriki se ne omejujejo več le na verska besedila, temveč prirejajo tudi filozofska, znanstvena in zgodovinska dela, s čimer bogatijo nabor znanja, dostopnega na Zahodu.

Že v 13. stoletju se je prevajanje postopoma začelo osvobajati izključno cerkvenega okvira in se uveljavljati kot orodje za širjenje znanja, zlasti v dvornih in univerzitetnih krogih. Ta proces se je v 14. stoletju še pospešil z množenjem francoskih

prevodov znanstvenih besedil, ki jih podpirajo meceni, kot je Karel V., s čimer prispevajo k uveljavitvi francoščine kot jezika znanja in oblasti. Vendar je ta napredek naletel tudi na odpor. Cerkev se je bala, da bi neposreden dostop do verskih besedil privedel do krivoverskih razlag. Nekateri takratni učenjaki pa so še vedno menili, da zvest prenos znanja omogoča le latinščina. Poleg tega sta kraljeva in cerkvena oblast, da bi širjenje znanja lažje nadzorovali, dostop do prevodov včasih omejevali.

Istočasno so verski prevodi doživljali pomemben razcvet. S prirejanjem Svetega pisma, teoloških komentarjev in drugih duhovnih del so prevajalci-kleriki krščansko kulturo približali širšemu občinstvu – ne več le duhovščini, temveč tudi posvetnim elitam. *Translatio studii* je tako vse bolj postajal neločljivo povezan s *translatio imperii*, saj je širjenje znanja spremljalo utrjevanje oblasti. Že v 14. stoletju so vladarji začeli spodbujati prevajanje temeljnih del – ne le za krepitev svoje avtoritete, temveč tudi za oblikovanje skupnega intelektualnega prostora za izobražene elite v svojem kraljestvu. Prenos zgodovinskih in filozofskih besedil v ljudski jezik, kot ga zasledimo v delih Pierra Bersuiresa ali Jeana de Vignayja, kaže na težnjo po vključevanju antične dediščine v nastajajoča področja znanja. Ti prevodi ne predstavljajo le prenosa znanja, temveč dejansko njegovo preoblikovanje, saj na novo določajo meje med posvetno učenostjo in izobraževanjem laikov. Prav tako ponazarjajo, kako se je *translatio studii*, ki so ga vodili cerkveni dostojanstveniki, prepletal s političnimi in kulturnimi ambicijami tistega časa ter hkrati prispeval k oblikovanju intelektualne podobe srednjeveške Evrope. Ta politika je vrhunec dosegla pod Karlom V., ko je prevajanje postalo sredstvo za širjenje in prisvajanje znanja v službi monarhične ideologije in odraz delovanja *translatio imperii*. Karel V. je tako naročal francoske prevode Aristotela, Avguština in Tita Livija – ni šlo več zgolj za omogočanje dostopa do besedil, temveč za vzpostavitev intelektualne kulture, ki služi obenem Cerkvi in monarhiji. Prevajanje je tako preseglo zgolj prenos znanja in postalo orodje za usmerjanje in prilagajanje znanja glede na politične in doktrinarne izzive tistega časa.

Ob koncu 14. in v začetku 15. stoletja se je *translatio studii* razvijal še naprej. Prevajanje namreč ni bilo več omejeno samo na učeno duhovščino, temveč je postalo širše gonilo širjenja in organizacije znanja. Prevajalci-kleriki, ki so dolgo delovali predvsem v cerkvenem okolju, so svojo vlogo razširili in začeli prehajati med verskimi, intelektualnimi in političnimi krogi. Njihovo delo ni bilo več omejeno zgolj na posvetna besedila, temveč so se lotevali tudi antične literature, filozofije in zgodovine. Takšen razvoj je bil odraz vse večje težnje po povezovanju dediščine preteklosti s sodobnimi izzivi in razmisleki. S spodbujanjem prevodov filozofskih, znanstvenih in zgodovinskih del je vladar prispeval k preoblikovanju znanja, francoščina pa je postopoma postajala tudi jezik mišljenja in vladanja. *Translatio studii* tako ni več označeval le prenosa znanja iz antike v zahodni svet, pač pa njegovo prilagajanje političnim in intelektualnim okoliščinam časa. Prav zato prevajanje ni bilo zgolj kulturno dejanje, temveč tudi politično – v *translatio studii* se vedno skriva komponenta *translatio imperii*, saj se s prenosom besedil prenaša tudi avtoriteta in moč (Movrin 2010, 24–26). Prenos znanja v srednjem veku je bil tako

tesno povezan z oblikovanjem nove intelektualne elite; pri tem so imeli ključno vlogo cerkveni učenjaki in njihovi meceni (Le Goff 1957, 98–101).

Ta proces se je nadaljeval tudi v 15. stoletju. Poleg širjenja znanja so prevajalci-kleriki postopoma postali tudi kulturni posredniki. Razširili so korpus prevedenih besedil in prispevali k uveljavitvi francoščine kot jezika znanosti. Poleg verskih besedilih so se v tem obdobju začela prevajati tudi antična dela, enciklopedije in zgodovinske kronike. Ta raznovrstnost je bila odraz vzpona izobraženstva, za katerega prevajanje ne predstavlja le prenosa znanja, temveč postane tudi orodje moči. S prevajanjem antičnih avtorjev so posvetni prevajalci v tem obdobju začeli tlakovati pot humanizmu in klasična znanja so postala del prenovljenega intelektualnega okvira. Izum tiska sredi 15. stoletja je posredovanje znanja še dodatno spremenil – omogočil je širšo dostopnost prevedenih besedil, pospešil dostop do znanja in okrepil intelektualne izmenjave.

V tem kontekstu *translatio studii* in *translatio imperii* ne zajemata le prenosa znanja in moči iz antike na krščanski Zahod – vključujeta se v dinamičen proces nenehnega prilagajanja, ki je zaznamovan s prevodnimi odločitvami prevajalcev-klerikov, pa tudi pričakovanji njihovih naročnikov. Tako presegata enostaven prenos znanja, saj sta aktivno prispevala k oblikovanju kulturnih in intelektualnih identitet srednjega veka. Prevajanje dediščino ne le ohranja, temveč jo obenem prilagaja intelektualnim in družbenim zahtevam svojega časa. S svojo sposobnostjo preoblikovanja znanja je zato prevajanje postalo gonilo inovacij, ki so pripeljale do vzpona humanizma ob koncu 15. in v začetku 16. stoletja, ko prevajanje ni bilo več le orodje za širjenje idej, temveč tudi sredstvo za njihovo proučevanje, reinterpretacijo in obnovo. Movrin (2010, 16–17; 28) opozarja, da se prevajalčeva zvestoba, ki jo označuje pojem *fidus interpres*, razkriva kot moralna in družbena kategorija, hkrati pa je vloga prevajalca v okviru *translatio studii et imperii* razumljena kot dejaven poseg v hierarhijo znanja in oblasti. Prenos znanja je bil zato vedno del širše kulturne in politične dinamike, v kateri se je skozi nadzor nad pomenom besedila oblikovala in legitimirala avtoriteta.

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Bogdan Kolar

Prispevek Slovencev k salezijanski 150-letni misijonski zgodovini

Contribution of Slovenes to The Century and Half of The Salesian Missionary History

Povzetek: V letu 2025 skupnost salezijancev praznuje 150-letnico začetkov misijonskega dela. V letu 1875 je namreč sv. Janez Bosko, ki je prvotno sam želel postati misijonar, v Argentino poslal prvo skupino članov skupnosti. Predvsem najbolj južni del Južne Amerike – ozemlja Čila in Argentine – je postal osrednje misijonsko področje, kjer so salezijanci zastavili svoje moči. Sledili so drugi deli sveta. Člani skupnosti slovenske narodnosti so se misijonskemu gibanju pridružili, še preden je bila ustanovljena prva ustanova na slovenskih tleh. V stoletju in pol je v misijone odšlo skoraj sto slovenskih salezijancev. Dali so več izvirnih pobud za podpiranje misijonskih ustanov, poklicev in študentov iz misijonskih dežel.[1]

Ključne besede: Janez Bosko (1815–1888), salezijanci, misijoni, Južna Amerika, Patagonija

Abstract: In 2025, the Salesian community celebrates 150 years of missionary work. In 1875, St John Bosco, who had originally wanted to become a missionary himself, sent the first group of members of his Congregation to Argentina. The southernmost part of South America, that is to say, the territories of Chile and Argentina, became the central mission area where the Salesians set their strength. Other parts of the world followed. Members of the Slovene community joined the missionary movement even before the first Salesian institution was founded on Slovene soil. In a century and a half, just under a hundred Slovene Salesians have gone to the missions. They have taken several original initiatives to support mission institutions, vocations and students from mission lands.

Keywords: Saint John Bosco (1815–1888), Salesians, missions, Latin America, Patagonia

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1. Uvod

Odločitev za novo obliko poslanstva, to je za delo med italijanskimi izseljenci in prvotnim prebivalstvom v Argentini, ki jo je sv. Janez Bosko (1815–1888) vključil med svoje izvirne naloge v Cerkvi, je po dobrih treh desetletjih delovanja med turinsko mladino pomenila preobrat v usmeritvi skupnosti. Do tedaj je bila ta znana po prizadevanju za delo med zapostavljenimi mladimi, po vodenju splošnih in poklicnih šol, tiskovni dejavnosti in skrbi za dober tisk, po organiziranem delu za podpiranje cerkvenih poklicev, pa tudi po organiziranju prostočasnih dejavnosti, s katerimi je mladim želela ponuditi priložnosti za koristno preživljanje prostega časa – in preventivno preprečiti možnosti za sprejemanje napačnih odločitev.

O osebnem misijonskem poslanstvu je ustanovitelj skupnosti J. Bosko razmišljal več let in iskal informacije o področjih, kjer bi svoj poklic lahko uresničil – in bi jih bilo mogoče povezati z drugimi oblikami dela za Cerkev. Njegovi najožji sodelavci so mu odsvetovali, da bi ustanove, ki jih je začel v Piemontu, zapustil in odšel na pot kot misijonar. Povabila, ki jih je dobival iz različnih delov sveta, pa so ga vendarle spodbudila, da je v nadaljevanju misijonsko poslanstvo naredil za bistveni sestavni del delovanja svoje ustanove v Cerkvi.

2. Začetki

Po večletnem razmisleku o možnosti prevzemanja misijonskega dela je J. Bosko povabilo, ki ga je oktobra 1873 dobil iz Argentine, razumel kot Božji namig. Argentinski konzul v Italiji Giovanni Battista Gazzolo je namreč v svojo domovino poročal o salezijanskem delu v Evropi in o ustanovah za mladino in predlagal, da bi skupnost povabili v Argentino. Dogovarjanje s cerkvenimi in državnimi oblastmi je trajalo dobro leto in pol. 11. novembra 1875 je v Argentino odšlo prvih deset salezijancev, ki so se odzvali vabilu vodstva skupnosti. V Buenos Airesu so se izkrcali 14. decembra 1875. Šlo je za prostovoljce, ki so se odločili, da svoj poklic v Cerkvi uresničijo v povsem novih razmerah (Vespignani 1925, 29). Skupino prostovoljcev je vodil poznejši apostolski vikar (1884) in nato kardinal Janez Cagliero (1838–1926), prvi v zgodovini salezijanske družbe. Primarna spodbuda za prevzem dela v Argentini je bila skrb za italijanske priseljence v Buenos Airesu in okolici, kot sestavni del svojega poslanstva pa so dobili nalogo, da iščejo možnosti odprtja ustanov med prvotnimi prebivalci Patagonije, Ognjene zemlje in Pamp, med katerimi so posamezni misijonarji delovali že prej, a je njihovo delo propadlo zaradi nasprotovanja domačinov. Že v letu 1876 so v predmestju Buenos Airesa (Almagro) postavili prve šole in odprli hišo v Urugvaju (Villa Colon). Hitro širjenje dejavnosti proti jugu Argentine je papežu Leonu XIII. omogočilo, da je novembra 1883 sprejel dve odločitvi: ustanovil je apostolski vikariat za severno in osrednjo Patagonijo in J. Cagliera imenoval za prvega vikarja; za jug Patagonije in Ognjeno zemljo je ustanovil apostolsko prefekturo in za njenega voditelja imenoval Jožefa Fagnana (Ceria 1941, 501). Že v prvem desetletju dela so se na Ognjeni zemlji srečali z indijanskimi plemeni Onas, Yagan in Alacalu-

fes, v nadaljevanju pa še z vrsto drugih. J. Bosko je do svoje smrti pripravil še deset skupin misijonarjev, tem pa so se v letu 1877 pridružile še prve sestre iz skupnosti hčera Marije Pomočnice. Pred odhodom so salezijanci dobili zelo jasne smernice za svoje ravnanje, za odnose do oblasti (te so imele do Cerkve in njenega vodstva v tistem času zelo napet odnos) in za način dela s prvotnimi prebivalci (poseben poudarek je veljal delu s sirotami, mladimi in bolniki). V letu smrti J. Boska 1888 je bilo v Južni Ameriki nekaj manj kot 150 salezijancev in 50 salezijanskih sester. Misijonske postaje so bile na Ognjeni zemlji (prva stalna skupnost je zaživela na otoku Dawson), v Argentini, Urugvaju, Braziliji, Čilu in Ekvadorju; za sprejeme nalog v Venezueli, Peruju in Kolumbiji so se začenjali pogovori (Ceria 1941, 600–601).

3. Nadaljevanje in nove ustanove

Misijonske odprave so se nadaljevale vsa naslednja leta, v katerih je občasno prišlo do večjih poudarkov na posameznih oblikah delovanja ali določenih delih sveta. Izvirne spodbude so bili okrogli jubileji – ti so bili posebne priložnosti za pregled opravljenega dela in sprejemanje novih poudarkov in usmeritev. Leta 1925 je skupnost s številnimi prireditvami zaznamovala 50-letnico odhoda prve skupine (*Cinquantenario*). Da dogodki ne bi sovpadali s svetim letom, so pretežni del proslav pripravili v šolskem letu 1925/26. Takratno vrhovno vodstvo je dalo vrsto pobud za to, da bi se zanimanje za misijone še povečalo in da bi postalo trajni del misijonske zgodovine. Poleg ustanovitve več misijonskih zavodov je zaživela stalna misijonska razstava (v letu 1925 je bila velika misijonska razstava organizirana tudi v Vatikanu), začela je izhajati revija *Gioventù Missionaria*, ki je misijonsko misel ohranjala med mladimi, pripravljena je bila vrsta gledaliških del z misijonsko vsebino, ki so jih uprizarjali v mladinskih centrih in šolah. Izšlo je več publikacij, ki so predstavljale do tedaj opravljeno delo v misijonih, zlasti med indijanskimi plemeni v Južni Ameriki. Med avtorji je izstopal Alberto De Agostini (1883–1960), priznan raziskovalec in pisec del s področja etnologije in geografije Patagonije, Ognjene zemlje in Magellanove ožine. V Turinu so v spomin na jubilej zgradili novo cerkev in jo posvetili Jezusu mladeniču. Na pot je odšla nova skupina misijonarjev – obsegala je 224 članov: 172 salezijancev in 52 sester hčera Marije Pomočnice. Misijonski križ jim je v slovesnem obredu podelil član prve skupine, kardinal J. Cagliero. Celotni obred so spremljala glasbena dela (*Te Deum, Tantum Ergo*), ki jih je zložil J. Cagliero (*La partenza*). Takrat je bilo v 1077 misijonskih ustanovah 1169 salezijancev in članic skupnosti hčera Marije Pomočnice.

Jubilejno leto 1975 je salezijanskemu misijonskemu delu dalo nov zagon, ki je bil ponovno povezan z obhajanjem svetega leta (*Centenario…* 1980, 13). Papež Pavel VI. je ob sprejemu vodstva skupnosti in stotih novih misijonarjev 22. novembra opozoril na izvirne značilnosti skrbi za ohranjanje misijonske razsežnosti skupnosti in vsakega posameznika. Hkrati jih je opomnil na nujnost povezanosti z delom celotne Cerkve, ki mora biti vedno misijonska. Med drugimi oblikami dela v misijonskem okolju je bila poudarjena skrb za domače poklice, kar je veljalo že

od prvih začetkov (samo pol leta po prihodu prve skupine misijonarjev v Argentino – to je v začetku leta 1876 – je papež Pij IX. že odobril načrt odprtja hiš za vzgojo domačih poklicev). Leta 1975 je bilo v misijonskem okolju 38 salezijanskih provinc; njihovo vodstvo je bilo v rokah domačinov. V misijonih je bilo 2913 salezijancev in 1522 salezijanskih sester. Od 528 novincev jih je bilo 335 (to je 65 %) iz tako imenovanega tretjega sveta in iz misijonskih dežel (*Centenario*… 1980, 16; 21).

Stalno prisotna sestavina salezijanskega misijonskega dela je bilo vključevanje laikov v vse oblike delovanja. Že v prvi skupini so bili od desetih misijonarjev štirje bratje pomočniki, ki so prevzeli skrb za pomembna področja misijonskega dela in življenja Cerkve (tehniki, inženirji različnih strok, kmetijski strokovnjaki, učitelji, glasbeniki). To je bilo veliko prej, preden je o izvirnem poslanstvu laikov v Cerkvi spregovoril drugi vatikanski koncil. V jubilejni misijonski skupini leta 1975 je bilo 20 laikov strokovno pripravljenih za vodenje izvirnih dejavnosti, njim pa se je pridružilo okoli sto prostovoljcev, ki so s svojimi znanji za določen čas želeli pomagati pri strokovnem usposabljanju mladih v izobraževalnih in vzgojnih ustanovah (*Centenario…* 1980, 16–17).

V času od 1980 do 2005 je veljal tako imenovani ‚projekt Afrika', po katerem je večji del novih misijonarjev odhajal na to celino. Vzpostavljene so bile nove strukture (več provinc) in hiše za formacijo domačinov, za prevzemanje odgovornosti pa usposobljeni domači kadri. V istem obdobju so se v misijonske akcije začeli vključevati člani skupnosti, ki so prihajali iz nekdanjih misijonskih dežel (Indija, Filipini, Vietnam).

Po letu 2005 je večja pozornost veljala ‚projektu Evropa', v kateri je bilo novih poklicev vedno manj, začelo se je združevanje provinc in zapiranje ustanov. Prostovoljci iz nekdaj misijonskih dežel so začeli prihajati v Evropo – v skladu s salezijanskim vzgojnim načrtom že v času študija filozofije in opravljanja obvezne vzgojne prakse, da so bili pred začetkom študija teologije že uvedeni v novo kulturno okolje in seznanjeni z jezikom. Spremljanje tega načrta je v pristojnosti svetovalca za misijone v vrhovnem vodstvu salezijanske skupnosti. Prvi salezijanski misijonar iz Afrike je v Slovenijo prišel oktobra 2021.

4. Odmevi med Slovenci

Slovenski cerkveni tisk je poročal že takoj o začetnem obdobju salezijanskega misijonskega delovanja. O tem sta pisala tako urednik *Zgodnje danice* kanonik Luka Jeran (1818–1896) kot katehet Janez Smrekar (1853–1920). Oba sta si prizadevala, da bi bil slovenski prostor dobro informiran o misijonskem delu nasploh – posebej pa o prispevku, ki ga je na tem področju dala salezijanska skupnost. Pri tem sta delo v misijonskih deželah videla kot bistveno značilnost salezijanske skupnosti in njenega mesta v Cerkvi, kakor si ga je zamislil njen ustanovitelj.

4.1 Na straneh *Zgodnje danice*

Za kanonika L. Jerana in bralce na Slovenskem sta bila najpomembnejši vir za to področje obe osrednji salezijanski publikaciji – *Bollettino Salesiano* (*Salezijanski*

vestnik) in pa *Letture Cattoliche* (*Katoliško branje*). Da so slovenski salezijanski sodelavci spremljali dogajanje v južnoameriških misijonih, je videti tudi po tem, da so svoje prispevke namenjali izrecno takim namenom (npr. »za ponesrečene salezijance v Patagoniji«) ali za povsem določene misijonske ustanove. Za darove sta se don Bosko in nato njegov naslednik Mihael Rua sproti zahvaljevala. Februarja 1880 je *Zgodnja danica* zapisala: »Poterdilo. Prejeli smo po vredn. ›Zg. Danice‹ z naj veči hvaležnostjo 50 gl. za Salezijanske misijone v južni Ameriki in ne bodemo jenjali moliti za dobrotnike… Za duh. J. Bosco-ta, duhoven Rua Mich.« (Iz Torina 1980) Poleg *Zgodnje danice* je darove za te namene objavljalo še glasilo *Venec cerkvenih bratovščin*, ki je v Ljubljani začelo izhajati leta 1897. Na temelju poročil misijonarjev in misijonske usmerjenosti v italijanskih zavodih se je oblikovalo prepričanje, da je don Boskova redovna skupnost po svojem bistvu misijonska – kar jo je ponovno še bolj povezalo z urednikom *Zgodnje danice* L. Jeranom, ki je svojo naklonjenost do misijonskega dela kazal na različne načine: tudi tako, da je sam dvakrat poskušal oditi v afriške misijone.

Vsaki misijonski novici ali poročilu so sledili obilnejši darovi, ki so bili objavljeni pod skupnim naslovom „za Don-Boskove misijone“ ali „za Boskov misijon“. Velikokrat so besede izražale začudenje nad hitrim širjenjem in blagoslovom, ki je spremljal delo salezijanskih misijonarjev. Uspehe so pripisovali zaslugam karizmatičnega začetnika, ki je znal mobilizirati vse sile in je delo v misijonih prikazoval kot prvovrstno obliko uresničevanja krščanskega in redovniškega poklica. Objavi Ruovega pisma je kanonik L. Jeran dodal: »Kako lepo seme pervega pedagoga sedanjega časa, ktero toliko imeniten in bogat sad po vsem svetu rodi. Don Bosko je razumel umetnost, iz naj bolj zapuščenih in zaverženih dečkov odgajati najboljši može v duhovstvu in v vsih oddelkih človeške družbe.« (Torin: Velikanska delavnost Boskovih misijonarjev 1892) Dve leti zatem je L. Jeran ob poročilu o odhodu nove skupine misijonarjev navdušeno dodal: »Res, pod očitnim in posebnim božjim varstvom je Don Boskov zavod. V malo letih je že poslal nad 800 misijonarjev v Ameriko, Afriko in Azijo. Koliko dobrega so že naredili, koliko nevernikov spreobernili, kako daleč razširili kraljestvo Božje! Naj bi se tega zavoda spominjalo vedno mnogo blagih dobrotnikov, da bi zmogel tako srečno kot dosedaj, delati še naprej.« (Turin 1894) Prvi dve desetletji sicer objavljanje novic o salezijanskih misijonskih dejavnostih ni vsebovalo načrtov ali želja, da bi se jim pridružili člani slovenske narodnosti.

4.2 Katehet Janez Smrekar

Katehet J. Smrekar je don Boskovo skupnost razumel kot povsem misijonsko in ji je želel s pridobivanjem prvih poklicev vzgojiti nove misijonarje. O tem se je osebno prepričal leta 1894, ko je v Italijo pospremil prvo skupino slovenskih kandidatov. Obiskal je zavod Valsalice blizu Turina, ki je bil namenjen izobraževanju prihodnjih misijonarjev (zavod je prvotno služil izobraževanju sinov plemiških družin iz Piemonta). Hitro je uvidel, da je bila pripravi novih misijonarjev posvečena velika pozornost. V ta namen so bili v nadaljevanju ustanovljeni tudi posebni zavodi, v katerih so kot vzgojitelji delali najboljši salezijanci. Višji predstojniki so z rednimi obiski in spodbudami v mladih ohranjali pripravljenost za odhode v misijone, občasni

obiski misijonarjev, ki so bili v Italiji zaradi zdravstvenih razlogov ali drugih opravil, pa so z njihovo besedo in osebno zavzetostjo na mlade kandidate naredili trajen vtis. Za marsikaterega od njih je bil – poleg dopisovanja in prebiranja misijonskih novic – prav osebni stik z misijonarji odločilnega pomena, da je zaprosil za odhod v misijone. Ustanova Valsalice je na Smrekarja naredila globok vtis, kar je razvidno iz opisa, ki ga je objavil v *Zgodnji danici* in v samostojni brošuri, ki ji je dal naslov *Naši salezijanci ali črtice o družbi salezijanski ter njenem pričetku na Kranjskem.* Kakšna je po njegovem bil namen te ustanove? »To mi namreč že ime pove ›Seminario delle missioni estere‹, po naše ›semenišče za inozemske misijone‹. Tukaj je namreč semenišče, kjer se mladenči raznih narodnostij iz raznih dežela učijo in pripravljajo za mašniški stan, da gredo potem v razne ptuje kraje in svetove po Ameriki, Afriki in Aziji oznanovat sveti evangelij Jezusov. Temu vzvišenemu namenu primerno je tudi celo poslopje urejeno in razdeljeno.« (Smrekar 1896, 31)[2] Valsalice je bilo prvo salezijansko misijonsko semenišče; v naslednjih letih pa so bile zaradi velikih potreb načrtovane in postavljene nove ustanove, ki so misijonarje s posebnimi programi pripravljale za določena področja misijonskega delovanja.

Obisk semenišča Valsalice je za J. Smrekarja pomenil še dodatno izkušnjo salezijanskega poslanstva. Delo v misijonih je imel za najpomembnejšo obliko apostolata, ki bi jo bilo treba prestaviti na slovenska tla. Fantje, ki jih je pošiljal v Italijo, naj bi postali začetki take ustanove – in vzgoja, ki so jo prejemali v italijanskih zavodih, naj bi jim pri tem pomagala. V tamkajšnjih zavodih naj bi se pravzaprav ‚nalezli' misijonskega duha, kar naj bi bil »najboljši pričetek ›misijonskega salezijanskega semenišča za vnanje misijone‹ na Kranjskem« (Smrekar 1896, 36). Velika naklonjenost misijonskemu delu, ki je bila bistveni sestavni del cerkvenega življenja na Slovenskem v 19. stoletju, je bila dobro zagotovilo, da se bodo z namenom oditi v misijone oglašali tudi kandidati za salezijansko skupnost.

Za prvega slovenskega salezijanskega misijonarja Marijana Rosina (1875–1938)[3] sicer velja poudariti, da ni izhajal iz osrednjega slovenskega prostora, temveč iz Trsta, kamor so se starši preselili s Krasa. Salezijancem se je pridružil v letu 1890 – torej še preden je bil odprt zavod v Trstu (1898) – in je še pred koncem leta 1891 odšel v Palestino, da bi s skupino salezijancev prevzel delo ustanove Bratje svete družine, ki je skrbela za vzgojo in izobraževanje sirot in zapuščenih otrok. Rosin je deloval v več krajih (Cremisan, Nazaret, Betlehem, Beit Jimal), kjer je bil predstojnik ustanov, dokler ni umrl nasilne smrti 23. junija 1938 v Beit Jimalu – umorili so ga arabski uporniki proti angleškim zasedbenim oblastem (Kolar 2002, 324).

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[2] V tej publikaciji je J. Smrekar ponatisnil članke, ki jih je objavil leta 1894 in 1895 v *Zgodnji danici*, potem ko je prve kandidate za salezijansko skupnost pospremil v Piemont. Publikacija mu je služila za pridobivanje novih podpornikov salezijanskih ustanov.

[3] Marijan Rosin se je rodil 8. decembra 1875 v župniji sv. Antona Novega v Trstu očetu Jakobu in materi Ivani, rojeni Tomažič. Prve zaobljube v salezijanski skupnosti je naredil 11. decembra 1891 v Turinu in dva tedna zatem odšel na Bližnji Vzhod. Teologijo je študiral v Jeruzalemu in tam postal duhovnik 4. junija 1898. Pretežni del svojega življenja – 46 let – je preživel med prebivalci Palestine, kjer je organiziral poklicno šolstvo in odprl več sirotišnic. Zavzel se je za ureditev svetišča, posvečenega mučeništvu sv. Štefana. Njegova mlajša sestra Mercedes je vstopila v skupnost hčera Marije Pomočnice. Prim. B. Kolar, Postranska žrtev sovraštva in nasilja. *Slovenski čas,* marec 2024, 8–9.

4.3 Salezijanski in drugi tisk

Ko so začele delovati salezijanske ustanove na Slovenskem, so iz njih v vseh obdobjih izhajali tudi misijonski poklici. Hkrati pa je salezijanski tisk, ki je začel izhajati po odprtju zavoda na Rakovniku, misijonska poročila razumel kot sestavni del poročanja. Poročila misijonarjev iz posameznih dežel so povzemali zelo podrobno in pogostokrat. Obširno so predstavljali težave, s katerimi so se morali misijonarji srečevati, in uspehe, ki so jih posamezne ustanove prinašale. Del rednega poročanja so bile novice o novih misijonskih skupinah, ki so odhajale po svetu proti koncu vsakega koledarskega leta. Ko je leta 1904 začel izhajati list *Don Bosko*, ki je bil »list salezijancev v Ljubljani«, je imel redno rubriko „Nekaj črtic o salezijanskih misijonih", v katerih je povzemal poročila o misijonskih ustanovah v Južni Ameriki. Poročanje o misijonih pa je ostalo bistvena sestavina salezijanskega tiska tudi v nadaljevanju. Glasilo *Salezijanska poročila,* ki je izhajalo od leta 1907 do 1915 in je bilo slovenski prevod italijanskega glasila, izhajajočega v Turinu, in od leta 1916 dalje *Salezijanski vestnik* sta imela redne misijonske rubrike. Največkrat so se imenovale „Iz naših misijonov" ali „Naši misijoni", kjer so bile objavljene misijonske novice in so se zbirala sredstva za podporo delu v misijonih. Podrobneje je bil predstavljen don Boskov misijonski poklic in njegovo delo za misijone. Slovenski misijonski tisk je o salezijanskih misijonarjih in sestrah misijonarkah redno poročal. V tridesetih letih 20. stoletja je *Vestnik* imel prilogo *Misijonska mladež*, ki objavljala prispevke, prej objavljene v italijanskem glasilu *Gioventù Missionaria*. Sredstva za podporo misijonarjem so se načrtno zbirala v Marijinem skladu.

Revija *Katoliški misijoni*, ki jo je od leta 1923 dalje izdajala Misijonska družba in je bila sprva uradno glasilo Družbe za širjenje vere, je bila gonilna sila vsega dogajanja, občasno pa so bile novice objavljene tudi drugod. Skoraj vsaka slovenska cerkvena publikacija pa je objavljala misijonske informacije ali imela redno misijonsko rubriko (Kolar 1998, 187–188). Zlasti je za seznanjanje s salezijanskim misijonskim dogajanjem skrbel Jožef Klekl st. v revijah *Marijin list*, *Novine* in *Kalendar Srca Jezusovoga*.[4]

Salezijanski tisk na Slovenskem je objavljal poročila o misijonskem delu, ki jih je prinašal salezijanski tisk po svetu, in izvirne prispevke. Občasno so objavljali naslove misijonarjev, sicer pa njihova pisma, poročila o misijonskih odpravah, prigode posameznih misijonarjev; skrbeli so za slikovno poživitev prispevkov in namensko zbirali sredstva za misijone ali za posamezne misijonarje, ki so začenjali svoje duhovniško poslanstvo. Navadno je misijonska tematika imela stalno mesto – in je v primerjavi z drugimi vsebinami vzbujala veliko pozornost.

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[4] Kleklovo delo za misijonske ustanove in poklice je bilo tudi tema posveta ob 150-letnici njegovega rojstva in 120-letnici izhajanja Marijinega lista 5. oktobra 2024 v Črenšovcih. Prim. T. Ciglar, Jožef Klekl st. in misijoni (predavanje na posvetu ob 150-letnici rojstva J. Klekla in 120-letnici začetka izhajanja Marijinega lista, Črenšovci, 5. oktober 2024).

O salezijanskem misijonskem delu so občasno pisali tudi slovenski misijonarji, ki so se pri svojem delu srečevali z njimi. Misijonar p. Maksimilijan Celejski (1831–1896)[5] je namreč v enem svojih pisem leta 1885 v Slovenijo poročal:

> »Neko prav zelo prijetno naznanilo Vam smem poročiti. Red Salezijanski, ki ima tukaj veliko udov, je prevzel misijon v Patagoniji in na Ognjenih otocih. Čverstost teh očetov in njihova moč daje dobrega se nadjati. Da se misijon še bolj povzdigne, je čast. p. Kagliero kot misijonski predstojnik (prefekt) posvečen za škofa in tje doli poslan. Kakor sem slišal od Malinkrotovih[6] sester, je svoj sedež prestavil v Punta Arenas ob Magellanski cesti. Nadjam se tudi, da ga bom mogel na popotovanji obiskati. Ker ga štejem med svoje znance, bi se ne spodobilo kar tako memo se peljati, ako se na tistem kraju kaj pomudimo.« (Celejski 1885, 388)

5. Načrtno poklicno delo

Dve desetletji pred drugo svetovno vojno je bilo zanimanje za misijonsko poslanstvo Cerkve pomemben del splošnega razpoloženja v Cerkvi na Slovenskem. V tem času so namreč tako na ravni vesoljne Cerkve kot Cerkve na Slovenskem dozorele številne misijonske pobude. Študij misijonskih tem je bila sestavina teološkega študija na Teološki fakulteti Univerze v Ljubljani, pri čemer je prve korake utiral prof. dr. Lambert Ehrlich (1878–1942), učitelj v Ljubljani po letu 1920. Med tiskanimi naslovi, ki so imeli obveščanje o misijonih in spodbujanje zanje za svoje poslanstvo, je bila revija *Katoliški misijoni*. Izhajalo je še več drugih publikacij, ki so jih izdajale misijonske skupnosti in podporna misijonska združenja. Cerkev je tudi redno obhajala misijonsko nedeljo, na katero so se pripravljali s tridnevnicami in drugimi dogodki. Na več krajih so bile postavljene misijonske razstave in misijonski muzeji. Vrstila so se tudi različna misijonska zborovanja, pripravljena navadno za posamezne stanove. Ustanovljene so bile misijonske družbe, ki so imele osrednjo nalogo obveščati o misijonih in zbirati sredstva v podporo misijonarjem in misijonarkam. Na Slovenskem se je naselilo več redovnih skupnosti, ki so imele misijonstvo za pomembno sestavino svoje redovne karizme.

Med pobudami, ki jih je prineslo praznovanje 50-letnice odhoda prve skupine

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[5] P. Maksimilijan Senica (Maksimilijan Celjski ali Celejski) je bil najprej član frančiškanske in nato kapucinske skupnosti, ki je v letih 1874–1887 deloval na ozemlju Čila in Urugvaja – sprva pa je bil določen za Brazilijo. V času priprave na misijonsko delo v Rimu je na Slovensko pošiljal poročila o delovanju misijonarjev svoje redovne skupnosti v Južni Ameriki. Zaradi težkih klimatskih razmer je leta 1874 odšel v Čile. Imel se je za prvega slovenskega frančiškana, ki je stopil na čilska tla. Deloval je v kraju Valdivia, kjer je srečeval domačine in prve nemške priseljence. Občasno je kot misijonar odhajal v Urugvaj, kjer je deloval v okolici prestolnice Montevideo (Kolar 1998, 103–104).

[6] Hčere krščanske ljubezni – usmiljenke – je ustanovila nemška plemkinja Pauline von Mallinckrodt (1817–1881), beatificirana leta 1985. Leta 1849 je zaživela prva skupnost za oskrbovanje revnih in slepih blizu Paderborna. Kulturni boj v nemških deželah je pripomogel, da so se sestre razselile v razne dele sveta. Leta 1873 so se naselile v Združenih državah Amerike, kasneje v Čilu in Argentini. Prim. spletne strani skupnosti.

misijonarjev v Južno Ameriko, je bil nov zagon dela za misijonske poklice, ki bi bil organiziran na svetovni ravni. Takratni vrhovni predstojnik salezijanske skupnosti, blaženi Filip Rinaldi (1856–1931; vrhovni predstojnik po 1922), je ustanovil več zavodov (poleg že omenjenega Valsalice), ki so prevzeli skrb za izobraževanje in vzgojo novih misijonskih poklicev, kandidatov za duhovništvo ali za brate pomočnike. Prvi tako zastavljen zavod pod imenom kardinala Janeza Cagliera je zaživel s šolskim letom 1922/23 v kraju Ivrea. Sledili so še drugi – Foglizzo, Penango, Gaeta, Bagnolo in Cumiana v Italiji ter Astudillo v Španiji in Shringley na Irskem. Pravi misijonski zavodi so postali model skrbi za pripravo novih misijonarjev, ki so delovali pod okriljem osrednjega vodstva – in z njim usklajeno. Izvirno zastavljeni študijski programi so pomembno prispevali k boljši realizaciji zastavljenih ciljev. Kandidati so bili v zavode sprejeti brezplačno. Ob vstopu so morali imeti priporočilo domačega župnika, krstni list in zaključene najmanj prve gimnazijske razrede. Salezijanski tisk je imel stalne rubrike, v katerih je podpornike misijonskih ustanov seznanjal z možnostmi podpiranja teh ustanov, dejavnosti za nove misijonske poklice in promocije misijonskega tiska.

Med slovenskimi salezijanci je bil osrednja osebnost duhovnik Jožef Radoha,[7] ki je načrtno in sistematično delal za seznanjanje z možnostmi uresničevanja misijonskega poklica in mladim pomagal, da so svojo željo lahko uresničili. Kot ravnatelj zavoda Martinišče[8] v Murski Soboti je bil v okolju, tradicionalno povezanem s Cerkvijo, don Bosku in salezijanskim ustanovam zelo naklonjen. Čeprav je kot ravnatelj omenjenega doma moral skrbeti predvsem za možnost šolanja mladih iz Prekmurja, da bi lahko postali nosilci javnih funkcij in škofijski duhovniki, in je moral izrecno obljubiti, da v zavodu ne bo promoviral salezijanskih ustanov, mu je zavod nudil materialne možnosti, da so v njem v času, ko ni bilo rednih dijakov (to je predvsem v počitniških mesecih), zbirali kandidati za salezijansko življenje. Temu naj bi sicer služil zavod Marijanišče v bližnjem Veržeju, ustanovljen že v letu 1912 in prvotno namenjen salezijanskim aspirantom. J. Radoha je prvo skupino zbral leta 1925 in v Turin postal prvih devet kandidatov. Bivanje v zavodu je bilo namenjeno predvsem uvodnemu seznanjanju z italijanščino.[9]

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[7] J. Radoha se je rodil 25. septembra 1887 v župniji Turnišče, umrl pa 27. junija 1956 v Murski Soboti. Bil je prvi salezijanec iz Prekmurja. Iz tiska, ki ga je izdajal Jožef Klekl st., je izvedel za možnost izobraževanja v italijanskih salezijanskih zavodih. V letu 1905 sta se za to pot odločila Jožef Bakan in Jožef Radoha, oba iz turniške župnije. Noviciat je opravil v Italiji in tam postal salezijanec. Teologijo je študiral v Italiji in na Poljskem. Duhovniško posvečenje je prejel 15. junija 1919 v Oswięcimu na Poljskem. Že kot dijak v Italiji je začel pisati besedila o salezijanskih temah in jih objavljati v Marijinem listu, ki ga je izdajal J. Klekl. Po novi maši je bil določen za kateheta na Rakovniku, nato je bil v istem zavodu še ekonom; jeseni 1921 je odšel v Veržej, kjer je opravljal isti službi. Ko se je med Prekmurci porodila misel na gradnjo internata, kjer bi lahko stanovali dijaki, ki bi obiskovali novoustanovljeno gimnazijo v Murski Soboti, se je Jožef Radoha povezal z organizatorji in postal gonilna sila za ustanovitev dijaškega doma. Leta 1923 je bil imenovan za ravnatelja novega zavoda; ta je začel delovati v letu 1924 (Kolar 2002, 311–312).

[8] Zavod Martinišče je kot dijaški konvikt začel delovati leta 1924 in je svoje možnosti razširil po letu 1930, ko je bilo zgrajeno novo poslopje. Kot temeljni namen zavoda je bila določena skrb za izobraževanje prekmurskih izobražencev, ki bi v pokrajini lahko prevzemali odgovorne javne službe.

[9] Za podrobnejše informacije o začetkih delovanja zavoda in o vlogi J. Radoha pri odločitvi, da naj bo zavod zaupan vodstvu salezijanske skupnosti prim. Kroniko zavoda Martinišče, ki jo je pripravil ravnatelj Franc Dündek in se nahaja v njegovi zapuščini (Arhiv salezijanske skupnosti na Rakovniku).

Z osebnimi stiki, pošto in poročili v tisku je J. Radoha pripomogel, da je v prvih petih letih – to je od 1925 do 1930 – v različne misijonske zavode v Piemontu odšlo kar 76 mladih kandidatov, velika večina med njimi iz prekmurskih župnij. 39 od teh jih je doseglo duhovniško posvečenje; manjša skupina se je odločila za življenje bratov pomočnikov, od katerih jih je več odšlo tudi v misijone. Posamezniki so v italijanske zavode odhajali še v naslednjih letih. Marsikdaj jih je na poti od doma do misijonskega zavoda spremljal J. Radoha sam, včasih pa so bili voditelji skupin mladi salezijanci, ki so prihajali domov na obisk ali na počitnice in se nato vračali v Italijo skupaj z novimi kandidati. J. Radoha je skrbel, da je tisk, ki ga je izdajal J. Klekl st., redno poročal o šolskem napredku dijakov, o njihovih poklicnih odločitvah in nalogah, ki so jih sprejemali po začetnih letih uvajanja v skupnost. Ko so odhajali v misijone, je objavljal njihova pisma. V celoti je v dveh desetletjih pred drugo svetovno vojno v salezijanske misijone odšlo 34 Slovencev (6 duhovnikov, 5 bratov, 23 študentov); velik del med njimi so bili kandidati, ki jih je v misijonske zavode poslal J. Radoha.

Poleg številnih mladih kandidatov, ki so si temeljno izobrazbo pridobili v italijanskih zavodih in so v pretežni meri odšli v Južno Ameriko, so v slovenski misijonski zgodovini ugledno mesto dobili trije slovenski salezijanci, ki so delovali na Daljnem vzhodu: Jožef Kerec (1892–1974; na Kitajskem 1921–1952), Jožef Geder (1901–1972; na Kitajskem 1929–1952) in Andrej Majcen (1904–1999; na Kitajskem 1935–1951). Po izgonu s Kitajske je Božji služabnik Andrej Majcen misijonsko delo nadaljeval v Vietnamu (do izgona leta 1976) in velja za ustanovitelja salezijanske skupnosti v tej deželi.

6. Še nove oblike dela za misijonske poklice

S koncem druge svetovne vojne in uvedbo nove družbene ureditve na Slovenskem, v kateri ni bilo prostora za številne dejavnosti, ki so bile pomembna sestavina življenja Cerkve pred vojno, so misijonske dejavnosti prenehale. Prekinjeni so bili stiki z misijonarji, saj je bil vsak stik s tujino sumljiv. Misijonska združenja, ki so prej skrbela za različne oblike podpiranja, so bila prepovedana. Redovne skupnosti z misijonskim delom kot osnovno obliko svojega delovanja so zamrle: člani in članice so se umaknili v tujino ali v domovini ostali povsem onemogočeni. Cerkveni tisk je hitro prenehal izhajati, s čimer je bilo uničeno osnovno orodje komuniciranja in obveščanja. Dvajset let po koncu druge svetovne vojne je bila tako Cerkev na Slovenskem odrezana od sveta in le z redkimi možnostmi stikov s Cerkvami po svetu.

Skrb za misijonsko delo pa se je med Slovenci vendarle ohranjala naprej – predvsem med slovenskimi begunci po svetu in med rojaki v zamejstvu. Če so prvi potrebovali vsaj nekaj let, da so si utrli pot iz begunskih taborišč in uredili materialne temelje življenja, pa je bilo več možnosti za zbiranje sredstev v misijonske namene med Slovenci v Avstriji in Italiji. Skupina slovenskih salezijancev, ki je bila prva leta po vojni v begunskih taboriščih, se je nato odločila, da se izseljencem pri njihovih odhodih v nove dežele ne pridruži. Postopoma pa so se vključili v župnij-

sko pastoralno delo na Koroškem in Tržaškem, kjer so dobili možnosti podpiranja misijonskih idej in misijonarjev, ki so bili v misijonih že iz časa predhodnega obdobja. Podpora se je izražala predvsem v uresničevanju treh spodaj opisanih pobud.

Po drugi svetovni vojni je prvi slovenski salezijanec, ki je odšel v misijone v Južno Ameriko, to možnost dobil leta 1967.

6.1 Zbiranje pomoči

Salezijanci, ki so bili v misijonih že pred svetovnim spopadom, so delo nadaljevali. Izmed beguncev so se jim pridružili še nekateri, ki so sicer v začetku našli zatočišče v Italiji, nato pa so se odločili za odhod v misijone. Nekaterim so bila pri tem v pomoč srečanja s provinciali, ki so prihajali iz misijonskih dežel in so se leta 1947 v Turinu udeležili vrhovnega kapitlja. Zato se je po vojni število slovenskih salezijancev v misijonih povečalo. Med tistimi, ki so ostali v Evropi ali odšli v Severno Ameriko, so vsaj nekateri imeli možnost ohranjati stike z rojaki v misijonih in sodelovati pri zbiranju sredstev, s katerimi so podpirali svoje dejavnosti. Pri tem so sodelovali z drugimi misijonskimi pobudniki – med temi je bil v Združenih državah Amerike in Kanadi osrednja osebnost član Misijonske družbe lazaristov Karl Wolbang (1913–1997),[10] ki je bil pobudnik in organizator akcije za podporo misijonarjem po imenu Misijonska znamkarska akcija. O delovanju te pobude ter o novicah iz misijonskih okolij je poročal slovenski tisk med rojaki po svetu. Po krajšem času izhajanja v Rimu so *Katoliški misijoni*, ki so jih s seboj ponesli člani Misijonske družbe, začeli izhajati v Argentini. Njihova gonilna sila je bil lazarist Ignacij Lenček (1914–1993),[11] ki je bil že pred vojno pomemben spodbujevalec misijonskih dejavnosti, urednik misijonskih publikacij in povezovalec misijonarjev. V listu *Katoliški misijoni* (in v nadaljevanju *Misijonska obzorja*) je redno dajal prostor salezijanskim misijonarjem, ki jim je namenjal tudi sredstva, zbrana v misijonske namene. Misijonske novice so prinašali še drugi slovenski listi po svetu – med njimi so izstopali *Ameriška domovina* in *Amerikanski Slovenec* v Združenih državah Amerike ter *Duhovno življenje* v Argentini. Kot vez med salezijanskimi misijonarji in misijonarkami je deloval list *Naše delo*, ki ga je od leta 1945 dalje v Italiji izdajal salezijanec Tone Vode – pri čemer je imel pred očmi prav povezovanje članov salezijanske skupnosti in sester hčera Marije Pomočnice, ki so bili razkropljeni po svetu (Kolar 2015, 230).

Po letu 1957, ko je v Celovcu začel delovati Mohorjev dijaški dom, katerega vodstvo so prevzeli slovenski salezijanci, je bil poudarek na misijonih vpet v vzgoj-

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[10] Duhovnik Karl Wolbang je postal član Misijonske družbe leta 1946; decembra 1947 je nato kot misijonar odšel na Kitajsko in tam deloval do januarja 1951, ko je bil izgnan in se je zatekel v Hong Kong. Po krajšem obdobju bivanja v Evropi je leta 1953 odšel v Združene države Amerike in se vključil v tamkajšnje ustanove Misijonske družbe. Bil je reden predavatelj, pridigar in voditelj duhovnih vaj (Gajšek 2009, 269–271).

[11] Lazarist Ignacij Lenček je bil osrednja osebnost misijonskih dejavnosti v Misijonski družbi na Slovenskem že pred drugo svetovno vojno in nato po njej – med izseljenci v Argentini. Revijo *Katoliški misijoni* je urejal od leta 1939 do 1987, ko se je preimenovala v *Misijonska obzorja*. Med slovenskimi izseljenci v Argentini je uresničil številne druge pobude, ki so pripomogle, da se je zgodil ‚argentinski čudež'. Umrl je le kratek čas po vrnitvi v samostojno Slovenijo (Gajšek 2009, 128–129).

ni načrt ustanove. Deloval je misijonski krožek, ki je kot obliko zbiranja sredstev za podporo misijonarjem začel pripravljati vsakoletno misijonsko tombolo.

6.2 Trikraljevska akcija

O misijonskih pobudah na Goriškem in Tržaškem je redno poročal tednik *Katoliški glas*; med Slovenci v Avstriji cerkveni list krške škofije *Nedelja*. Na Koroškem in v škofiji Krka-Celovec – to je predvsem v slovenskih župnijah južne Koroške, kjer so delovali salezijanci – so imeli možnost ohranjati zavzeto podpiranje misijonarjev in predstaviti še nove pobude. Tu je zaživela ‚trikraljevska akcija', to je obiski kolednikov, ki so vsako leto v božičnem času načrtno zbirali sredstva za misijonarje. Akcijo je začel salezijanski duhovnik Janez Rovan (1911–1988)[12] ob koncu leta 1946, ko je postal kaplan v župniji Žvabek. Kolednike je takrat predstavljala skupina 11 ministrantov (trije med njimi so nosili kraljevska oblačila), ki so v času od božiča do praznika svetih Treh kraljev skupaj s kaplanom J. Rovanom večer za večerom obiskovali vse družine v župniji in v hiše prinašali blagoslov. Najprej so zapeli pesem, pokadili hišo s kadilom in prosili za pomoč za misijonarje. Tako so zbirali darove – ne zase, temveč za tiste, ki so pomoč najbolj potrebovali, to je otroke in mladino v misijonih (Zerzer 2006, 279–283).

Janko Zerzer J. Rovana imenuje ‚oče trikraljevske akcije': »Trikraljevsko koledovanje, ki ima na Koroškem dolgo tradicijo, je dobilo po njegovi zaslugi nov smisel. Od nekdaj je bila na Koroškem – svoj čas tudi v Sloveniji – navada, da so šli odrasli ‚kralje pet': hodili so od hiše do hiše, in kar so nabrali, denarne ali užitne darove, so obdržali zase.« Rovan je akciji dal nov smisel: »Denarnih darov, ki so jih tako zbrali, pa si niso razdelili med seboj, temveč so nabirko poslali misijonarjem v Indijo. Kar so zbrali materialnih darov, živila kot meso, maslo in druge kmečke pridelke, pa je Rovan poslal v begunska taborišča v Lienz in Spittal.« (Zerzer 2006, 282)

Indija je bila izbrana zato, ker je v salezijanski skupnosti v tistem času največja pozornost veljala delu v indijskih misijonih in je bilo tam tudi več slovenskih misijonarjev in misijonark.

J. Zerzer dodaja:

> »Ta misijonska akcija se je najprej razširila po župnijah, kjer so delovali slovenski salezijanci. To salezijansko misijonsko akcijo je prelat dr. Blüml spremljal s simpatijo in je poskrbel, da je najprej postala vseškofijska zadeva s centrom na Dušnopastirskem uradu. Ko se je pozneje udeležil dušnopastirskega tečaja na Dunaju, je navdušeno poročal o koroški salezijanski iniciativi in predlagal, da bi to akcijo prevzele vse avstrijske škofije.

[12] Salezijanec Janez Rovan, doma iz Martinjaka pri Cerknici, je postal duhovnik leta 1943 v Pinerolu (Italija). Ob koncu druge svetovne vojne se je iz Slovenije umaknil na Koroško in potem, ko so se zaprla begunska taborišča, deloval po različnih župnijah. Krajši čas je bil med Slovenci na Tržaškem. Na koroških župnijah je začel vrsto dejavnosti, v katere so bili pritegnjeni mladi. Med temi poleg dela za misijonarje izstopa zavzemanje za ustanovitev skupine koroških slovenskih skavtov. Po ustanovitvi Gimnazije za Slovence v Celovcu je J. Rovan postal član ekipe, ki je oskrbovala dijaške domove (Kolar 2002, 325–326).

> Predlog je bil sprejet, in zdaj (sc. 2005) hodijo okoli novega leta ministranti po vsej Avstriji od hiše do hiše, in vsota, ki jo tako naberejo, raste iz leta v leto. Samo na Koroškem se je akcije leta 2005 udeležilo 6.000 deklet in fantov, ki so nabrali 1.1 milijona evrov, na vseavstrijski akciji pa je sodelovalo 90.000 ‚kraljic in kraljev', skupni znesek nabranih darov pa je bil domala 15 milijonov in pol evrov.« (Zerzer 2006, 283)

V štirih desetletjih se je akcija razširila po vseh avstrijskih škofijah, nato so pobudo prevzele nekatere škofije v Zahodni Nemčiji – še pred razglasitvijo slovenske samostojnosti pa se je ‚trikraljevska' akcija razširila tudi v osrednjo Slovenijo. Leta 1995 jo je kot svojo sprejelo Misijonsko središče Slovenije in je od tedaj del misijonske animacije Cerkve na Slovenskem.

6.3 Podpiranje misijonskih bogoslovcev

Misijonar v Indiji salezijanec Pavel Bernik (1917–2000)[13] je med svojim obiskom na Koroškem leta 1955 dal pobudo, da bi se posamezniki, družine, združenja ali župnije odločili za duhovno in materialno podpiranje posameznih misijonskih bogoslovcev. Poznal je razmere v Indiji in videl, da mnogi mladi, ki bi v Cerkvi želeli sodelovati, niso imeli možnosti za izobraževanje. Pomoč je bila potrebna zlasti, če so želeli študij nadaljevati v Evropi ali v drugih študijskih središčih. Kot sodelavec v izobraževalnih ustanovah za duhovne poklice je P. Bernik vedel, da so za njihovo delovanje potrebni strokovno in duhovno usposobljeni vzgojitelji, ki pa so si zahtevane kvalifikacije lahko pridobili le v ustreznih ustanovah. Za kritje študijskih stroškov je začel iskati podpornike. Navdušenega podpornika za to akcijo je našel v sobratih Ivanu Matku (1910–1997),[14] takrat kaplanu v župniji Sele, in Antonu Cvetku (1915–1999),[15] župnijskem upravitelju v Medgorjah in Podgradu na Koroškem. P. Bernik je nekaj dni preživel v Selah in Selanom predstavil svoje delo. Ko se je vrnil v Indijo, je s seboj že nesel sredstva, ki so jih prispevali Selani in so bogoslovcem pomagala v študijskem letu 1954/55. Iz tega se je razvila rodovitna misijonska pobuda, ki je v času Bernikovega življenja več kot 2.000 bogoslovcem pomagala, da so dokončali bogoslovni študij in se vključili v misijonsko življenje. Za Indijo je

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[13] Salezijanec Pavel Bernik (1917, Škofja Loka – 2000, Dimapur, Indija) je v misijone v Indijo odšel konec leta 1934. Tam je najprej dokončal študij filozofije in teologije in 30. januarja 1944 prejel duhovniško posvečenje. Kot vzgojitelj in učitelj je deloval več vzgojno-izobraževalnih ustanovah salezijanske skupnosti. Bil je misijonar v pokrajinah Nagaland in Manipur, zadnji del življenja je preživel v študijskem središču Dimapur, kjer je bil učitelj liturgike, bibličnih ved in patrologije. Slovenijo in Koroško je prvič obiskal leta 1955 (Kolar 2002, 31–33).

[14] Salezijanec Ivan Matko (1910, Beltinci – 1997, Železna Kapla) je bil v duhovnika posvečen 3. julija 1938 v Ljubljani in je nato deloval v salezijanskih zavodih na Slovenskem; maja 1945 je odšel na Koroško. Po delu med taboriščniki se je vključil v župnijsko pastoralo, najprej v Tinjah in po letu 1952 v Selah. Najprej je bil dolga leta kaplan, nato župnik v Selah in Bajtišah. Uresničil je številne pobude za prenovo cerkvenega, kulturnega in narodnega življenja. V njegovem času so Selani pomagali več kot 150 bogoslovcem in mladim duhovnikom (Kolar 2002, 227–229).

[15] Anton Cvetko (1915, Cerknica – 1999, Celovec) je bil najprej salezijanski brat; po študiju teologije je bil 4. decembra 1949 posvečen v duhovnika. Nekaj let je deloval v Italiji, leta 1952 se je preselil na Koroško in prevzel skrb za župniji Medgorje in Podgrad. Poznan je bil kot voditelj ljudskih misijonov in organizator romanj (Kolar 2002, 61–62).

prišel na vrsto Vietnam in nato številne druge države. Študentje teologije so pomoč prejemali bodisi v domačih semeniščih ali v času svojega bivanja v Evropi.

Med misijonskimi bogoslovci in koroškimi podporniki so se spletne posebne vezi. Vezni člen je kmalu postal misijonski urad pri Dušnopastirskem uradu krške/celovške škofije. Mnogi bogoslovci so za svoje nove maše prišli na Koroško – in takrat so jih njihovi dobrotniki prvič srečali. V misijonskih publikacijah Cerkve na Koroškem pa so bila že pred tem objavljena njihova imena in fotografije. »Brez velikodušnega razumevanja in podpore koroške duhovščine tej akciji in požrtvovanju Dušnopastirskega urada, ki je pod vodstvom g. Kopeiniga prevzel nase to precej težko naknadno delo, bi se ta akcija nikakor ne mogla razviti v pravcati plaz, ki se je odtrgal iz pobočja Košute in zajel vso južno Koroško,« je Bernik zapisal ob spominih na začetke zbiranja pomoči za misijonske bogoslovce (Bernik 1984). Župnija Sele je bila izbrana za kraj osrednje proslave ob obhajanju misijonskega jubileja – leta 1988 je namreč število bogoslovcev iz misijonskih dežel Azije, Afrike in Južne Amerike, ki so jim študij omogočili koroški dobrotniki, doseglo število tisoč; stotim od teh so pomagali člani župnije Sele.

7. Statistični pregled

Statistični podatki so svojstven kazalec zanimanja slovenskih salezijancev za delo v misijonih. Zavodi na Slovenskem so imeli jasno definirane naloge: nobeden med njimi ni bil opredeljen kot misijonski zavod, čeprav je zavod na Radni pri Sevnici zaradi večjega števila misijonskih prostovoljcev iz vrst tamkajšnjih gojencev pridobil sloves misijonom naklonjene ustanove. Vzpodbujanje zanimanja za misijone je bilo del rednih dejavnosti, ki so jih zavodi opravljali: misijonske tematike so bile vključene v pedagoške procese, v družabne in gledališke dejavnosti. Tako imenovani ‚misijonski krožki' so si prizadevali, da bi bile te vsebine del vsakodnevnega življenja. Občasne izredne prireditve so rednemu delu dajale nov zagon in potrjevale pravilnost predhodnih usmeritev.

Glede na organizacijo salezijanske skupnosti na svetovni ravni v času do druge svetovne vojne, kjer je imela osrednje mesto tako imenovana ‚rimska provinca', v katero so bile vključene vse ustanove, ki so skupnosti služile na svetovni ravni, so bili nekateri slovenski kandidati, ki so svoje uvajanje v skupnost opravili v italijanskih zavodih, vključeni vanjo. Spodnja statistika zato predstavlja misijonarje slovenske narodnosti, ki so bili člani tudi drugih provinc in ne le jugoslovanske, ki je obsegala zavode na ozemlju Kraljevine Srbov, Hrvatov in Slovencev oz. Kraljevine Jugoslavije. Za leti 2022 in 2025 je skupnemu številu dodano število misijonarjev, ki so se slovenski skupnosti pridružili iz drugih okolij – to je iz Afrike, Vietnama in Indije.

leto	Latinska Amerika	Afrika, Bližnji vzhod	Indija, Srednji vzhod	Daljni vzhod	skupaj
1901	3	1			4
1914	8	1			9
1923	6	2		1	9
1941	30	3	4	8	45
1951	32	2	7	7	48
1971	18	2	3	6	29
1991	9	5	3	4	21
2011	4	6			10
2022	1	3			4 + 5
2025	1				1 + 6

Tabela 1: *Salezijanski misijonarji slovenske narodnosti.*

8. Sklep

Zanimanje za misijone in dejavnost za podpiranje misijonov moramo obravnavati kot bistveni sestavni del podobe salezijancev na Slovenskem. To je veljalo že od vsega začetka, odkar je slovenski tisk poročal o don Bosku in njegovem poslanstvu. Neredko so skupnost imenovali kar ‚misijonska družba'. Da so se za odhod v misijone odločali mnogi mladi, je pripomogla tako usmeritev vodstva Družbe na svetovni ravni kot tudi novi pogledi na misijonsko poslanstvo Cerkve, ki so se uveljavljali v vodilnih strukturah Cerkve na svetovni ravni. Močna spodbuda za nov misijonski zagon je bil 50-letni jubilej odhoda prve misijonske skupine v Južno Ameriko in velika podpora misijonskemu delu, ki jo je izkazal takratni vrhovni predstojnik Filip Rinaldi. Usmeritev se je nadaljevala tudi po drugi svetovni vojni, ko se je za odhod v misijonsko okolje odločila skupina salezijancev, ki so maja 1945 zapustili Slovenijo in se priključili begunskemu valu. Po krajšem obdobju v italijanskih zavodih so sprejeli pobudo in odšli v misijonske dežele – tudi zato, da bi bili zunaj dosega novih komunističnih oblasti, ki prevzele Slovenijo in začele ovirati delovanje Cerkve. Nov zagon je misijonskemu delu prinesel drugi vatikanski koncil, ki je sprejel poseben Odlok o misijonski dejavnosti Cerkve.

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Janja Hojnik

Duhovščina kot politično nelojalni element: sodni pregoni v mariborskem okrožju med obema vojnama

The Clergy as a Politically Disloyal Element: Trials in the Maribor District Between the Two Wars

Povzetek: Raziskava na podlagi sodnih spisov mariborskega okrožja iz obdobja med obema vojnama analizira vlogo katoliške duhovščine kot politično nelojalnega elementa v očeh oblasti Kraljevine SHS, pozneje Jugoslavije. Čeprav duhovniki formalno niso bili politični funkcionarji, so njihovi izjave in dejanja pogosto presegali okvir verskega oznanjevanja in bili razumljeni kot neposreden politični komentar. Kritike kralja, državnih praznikov in jugoslovanskega unitarizma, podpora dr. Antonu Korošcu v času njegovih napetih odnosov z beograjsko vlado, konflikti s Sokolom kot simbolom državne lojalnosti ter simpatije do prepovedanih Orlov so bile v sodnih spisih obravnavane kot izrazi politične nelojalnosti.

Analiza kaže, da so bili duhovniki zaradi svoje moralne avtoritete in vpliva na vernike obravnavani strožje kot drugi izobraženci. Medtem ko so bile nepremišljene izjave laikov pogosto spregledane ali kaznovane mileje, so se podobne izjave duhovnikov obravnavale kot resna grožnja državni enotnosti. Sodna praksa je bila sicer ambivalentna – od zapornih kazni do pogojnih obsodb –, a je razkrivala trajno sumničavost režima do Cerkve kot potencialno opozicijske sile.

Študija tako potrjuje tezo, da je bila duhovščina zaradi razpetosti med cerkvenim pravom in državnimi zakoni specifičen izobraženski sloj, ki je pred sodišča prihajal pogosteje kot druge skupine. Sodni spisi so odraz tega konflikta, saj razkrivajo, kako so prižnice, verouk in celo gostilniški pogovori postajali prostori, kjer se je oblikoval odpor proti jugoslovanski državni ideologiji.

Ključne besede: duhovščina, politična nelojalnost, Kraljevina Jugoslavija, Maribor, sodni spisi, Sokoli, Orli, Anton Korošec, verski spori

Abstract: Based on court records from the Maribor district in the interwar period, this study examines the role of the Catholic clergy as a politically disloyal element in the eyes of the authorities of the Kingdom of Serbs, Croats, and Slovenes/Yugoslavia. Although priests were not formally political officials, their sermons and public statements often transcended the religious domain and were

interpreted as direct political commentary. Criticism of the king, national holidays, and Yugoslav unitarism, support for Anton Korošec during his tense relations with the Belgrade government, conflicts with the Sokol movement as a symbol of state loyalty, and sympathies for the banned Catholic youth organization Orli were all treated in court as signs of political disloyalty.

The analysis shows that clergy were judged more harshly than other intellectuals because of their moral authority and influence over believers. While the careless remarks of lay people were often overlooked or punished mildly, similar statements by priests were regarded as a serious threat to state unity. Court practice was ambivalent—ranging from prison sentences to suspended fines—but consistently reflected the regime's suspicion of the Church as a potential oppositional force.

The study thus confirms the thesis that, due to their position between catechism and the law, the clergy represented a specific social group of educated elites who appeared before the courts more frequently than others. The preserved case files offer a direct insight into this tension, revealing how pulpits, catechism classes, and even tavern conversations became spaces where resistance to Yugoslav state ideology was articulated.

Keywords: clergy, political disloyalty, Kingdom of Yugoslavia, Maribor, court records, Sokol, Orli, Anton Korošec, religious conflicts

1. Uvod: politično-cerkveni konteksti v medvojnem Mariboru

Mariborsko sodno okrožje je bilo v času med obema vojnama – podobno kot druga sodna okrožja na Slovenskem – izrazito občutljivo prizorišče političnih in verskih obračunov.[1] Pravni red Kraljevine SHS oziroma Jugoslavije je temeljil na široko zasnovani zaščiti države in njenih simbolov: kazenskopravno varstvo je obsegalo ne le kralja in kraljevo družino, temveč tudi celoten aparat oblasti – od ministrov in uradnikov do žandarjev in graničarjev. Posebej zaščiteni so bili tudi državni simboli, zastave, prazniki in uradna znamenja, kar je organom pregona omogočalo prožno interpretacijo vsakega odklona, kot da gre izraz politične nelojalnosti.

V Pokrajinskem arhivu Maribor se je ohranil obsežen korpus več sto sodnih spisov, ki pričajo o tem, kako je sodstvo obravnavalo posameznike, katerih besede, dejanja ali simbolne geste so bile razumljene kot politično nevarne. Ti spisi predstavljajo neposreden in dragocen odraz delovanja pravosodja kot orodja za disciplíniranje javnega diskurza ter za nadzor nad mejami politično dopustnega v večetničnem in versko raznolikem okolju severovzhodne Slovenije.

Pred sodišče so prihajali delavci, posestniki in izobraženci. Posebno mesto med izobraženci pa pripada katoliškim duhovnikom. Njihov položaj je bil dvojen: kot

[1] Za poglobljeno predstavitev glej Oset idr. 2010; Mikuž 1965; Perovšek 1998; Pirjevec 2025.

nosilci cerkvene avtoritete so bili namreč zavezani cerkveni zakonodaji in odločitvam škofovske oblasti, obenem pa so morali kot državljani izkazovati lojalnost jugoslovanski državi. To ravnotežje je bilo pogosto napeto, saj so njihovi govori in dejanja hitro dobili politični prizvok – bodisi kot kritika oblasti bodisi kot izraz nacionalne zavesti.[2] Prav zato se v sodnih spisih pogosto znajdemo na meji med verskim nagovorom in politično provokacijo. Duhovniki in drugi cerkveni uslužbenci niso bili preganjani zaradi vere kot take, temveč zaradi politično spornih izjav, ki so jih oblasti tolmačile kot za enotnost države nevarne. Besede duhovnikov niso bile razumljene zgolj kot osebna mnenja, temveč kot sporočila s potencialnim vplivom na celotne skupnosti, kar je njihovo vlogo v očeh oblasti delalo posebej problematično.

Sodni spisi iz tridesetih let 20. stoletja razkrivajo različne ravni tovrstnih konfliktov. Kritike kralja in njegovih simbolov so npr. pomenile neposreden napad na temelj državne legitimnosti in so bile strogo sankcionirane. Posebno občutljivi so bili primeri, ko so duhovniki izražali podporo dr. Antonu Korošcu – voditelju Slovenske ljudske stranke, ki je bil tesno povezan s Cerkvijo, a je imel v določenih obdobjih z vlado v Beogradu izrazito napete odnose. V teh trenutkih je bila naklonjenost Korošcu razumljena kot politično neprimerna in je pomenila indikator nelojalnosti režimu. Nadalje se je politični konflikt med vero in državo kazal v odnosu do mladinskih organizacij: Sokoli kot simbol državne lojalnosti so uživali zaščito oblasti, medtem ko so bili Orli kot katoliško-protirežimsko gibanje tarča pregona, pri čemer je bila posredno preganjana tudi duhovščina. Dodatne napetosti so se kazale v širšem okviru verskih sporov – v odnosu do pravoslavne Cerkve, Jehovovih prič in drugih veroizpovedi; tu je katoliški kler pogosto nastopal kot element, ki je spodkopaval državno ideologijo jugoslovanskega unitarizma.

Raziskovalna teza prispevka je, da so bili štajerski duhovniki v obdobju med obema vojnama v specifični razpetosti med državnimi zakoni in cerkvenim pravom. V primerjavi z večino izobražencev, ki so dobro poznali pravne omejitve svobode govora in se zato pred sodiščem zaradi tovrstnih kršitev znašli le redko, je bilo z duhovščino drugače. Moralna zavezanost katehetskemu nauku in pa politična bližina Slovenski ljudski stranki sta pogosto prevladali nad pravnimi omejitvami, zaradi česar so se duhovniki in njihovi podporniki kot politično nelojalni v sodnih postopkih znašli pogosteje. Sodni spisi mariborskega okrožja tako razkrivajo, da je bil kler v očeh oblasti hkrati verski in politični dejavnik, katerega izjave in dejanja so predstavljala izjemo od siceršnjega vzorca previdnega ravnanja izobražencev v javnem prostoru.

2. Kritika kralja in oblasti kot neposredna nelojalnost

Sodni spisi mariborskega okrožja kažejo, da so bile oblasti posebej občutljive na izjave duhovnikov, ki so neposredno ali tudi posredno kritizirale kralja, državne

[2] Glej tudi Maver 2020.

praznike ali jugoslovanski unitarizem. Primeri razkrivajo, kako so se v pastoralnem in vsakdanjem govoru prepletale verske in politične vsebine, ki so jih oblasti razumele kot za državno enotnost nevarne.

Ob rojstvu kraljeviča Andreja decembra 1930 se je v Šentilju v središču pozornosti znašel tamkajšnji duhovnik Evald Vračko, ki je med domačini slovel kot nekdanji borec proti nemškemu vplivu in tudi prejemnik kraljevega odlikovanja sv. Save IV. stopnje. Ko na župnijski hiši ni izobesil državne zastave, so nekateri to razumeli kot tiho, a vendarle pomenljivo sporočilo, da ne pristaja na uradno razglašeno jugoslovansko enotnost, ki so jo simbolno utelešali tudi Sokoli. Še večji nemir je povzročila pripisana mu izjava, da »mora nastati kulturni boj«, ki je v očeh oblasti zvenela kot klerikalni poziv k spopadu z državno ideologijo. Vračko se je branil, da gre za nesporazum – da je ob občinskem dogodku zgolj ponovil kraljeve lastne besede o enakopravnosti narodov in da ni imel namena žaliti ne države ne njenih simbolov. Spomnil je tudi na svoje pretekle zasluge v narodnostnem boju proti nemški Südmarki in na trpljenje v zaporu leta 1914 zaradi srbofilstva. Njegov položaj so dodatno utrdila pisma podpore lokalnih oblasti, zlasti sreskega načelnika. Ker so bili dokazi šibki in priče redke, je tožilstvo obtožbo umaknilo. Primer razkriva, kako občutljive so bile v času šestojanuarske diktature oblasti na vsakršno odstopanje od ritualov državne lojalnosti. Zavrnitev izobešanja zastave in omemba ‚kulturnega boja' sta se tako v politično nabitem vzdušju razumeli kot ideološko izzivanje. Čeprav se je zadeva končala brez obsodbe, odmeva kot droben, a zgovoren dokaz, da je bilo v tridesetih letih tudi na videz nepolitično dejanje mogoče razumeti kot politično provokacijo (Kzp VI/11/1930).

Kaplan Janko Petan iz Cerkvenjaka je med veroukom kraljevo sliko obrnil proti steni in učence vprašal, kaj naj bi njena prisotnost sploh pomenila: »Kaj pa ta tu dela?«. V istem kontekstu je omenjal Sovjetsko zvezo in zavračal praznovanje državnih praznikov. Zaradi tega je bil obsojen na dva meseca in 15 dni zapora. Primer jasno kaže, da so oblasti simbolne geste – kot je obračanje kraljeve slike – razumele kot neposredno žalitev monarha in s tem države (Kzp V 214/1933; Kzp X 1430/1932).

Podobno so bile obravnavane tudi izjave, ki so odpirale vprašanje nacionalne prihodnosti Slovencev. Kaplan Jožef Varga iz Sv. Jurija v Prekmurju je dejal, da bo po smrti kralja za Slovence bolje, saj da se bodo lahko od Srbov in Hrvatov odcepili. Čeprav zaradi pomanjkanja dokazov ni bil kaznovan, je bil postopek sam po sebi znak, da so oblasti vsakršne izjave, ki bi problematizirale jugoslovansko enotnost, pozorno spremljale (Kzp VII 1410/1934). Kaplan Martin Erhatič pri Sv. Jakobu je izrazil mnenje, da bi bilo bolje, če bi bili na oblasti verni ljudje. Čeprav se je postopek proti njemu končal brez kazni, je primer pokazal, da so sodišča kot politične komentarje razumela tudi moralne in pastoralne opazke (Kzp IX 1613/1933).

V politično občutljivem okolju so bile nevarne tudi posredne kritike oblasti. Leta 1931 je tako razprava (v Partličevi gostilni v Zgornjem Dupleku) o članku v časniku *Neues Wiener Journal*, ki je poročal o domnevni poneverbi predsednika vlade Petra Živkovića, prerasla v sodni postopek. Med sogovorniki sta bila tudi župnik An-

ton Lajnčič iz Zibike pri Šmarju in hoški župan Herman Glasser. Obtožnica je bila vložena le proti Glasserju, a je bil oproščen, saj pričanje železničarja Budje ni bilo dovolj zanesljivo. Kljub temu pa primer kaže, da so lahko do kazenskega postopka hitro privedli tudi zasebni pogovori ob kozarcu vina – če so seveda oblasti ocenile, da spodkopavajo zaupanje v državne voditelje (Kzp 3187/1931).

Ti sodni postopki kažejo, da so duhovniki v svojih izjavah pogosto izražali versko in narodno identiteto, kar je oblast dojemala kot politično nevarno. Izražanje dvoma v kraljevo avtoriteto, jugoslovanski unitarizem ali legitimnost oblasti je bilo vse razumljeno kot neposredna grožnja – še posebej, kadar je prihajalo s prižnice ali iz ust cerkvenih oseb, ki so v skupnosti uživale zaupanje in spoštovanje.

3. Incidenti in neposreden odpor

Poleg kritičnih izjav so nekateri duhovniki in cerkveni sodelavci odpor do državnih predstavnikov izražali tudi neposredno. Kaplan Andrej Klobasa iz Kapele je tako javno zaničeval sodnika, zbiral pisne pritožbe proti njemu in pozival ljudi, naj poslušajo, kako se vede. Zaradi vztrajnega in ponavljajočega se ravnanja je bil obsojen na dva meseca zapora s trdim ležiščem. Primer razkriva, da so duhovniki svoj moralni kapital pogosto uporabljali za spodbujanje odpora proti uradnim osebam, kar je oblast razumela kot spodkopavanje pravne avtoritete (Vr VIII 1359/1924).

Manjši incidenti so bili povezani s pisnimi intervencijami ali neposlušnostjo oblasti. Upokojeni župnik Jožef Klekl je generalu Rudolfu Maistru pisal, da ga je sodnik obsodil po krivici, a je zadeva zastala, ker Maister pisma ni predal naprej (Kzp VII 90/1933). Župnik Ivan Zadravec pa je iz hiše nagnal uradnika, ki je preverjal zavarovanje njegove kuharice, zaradi česar je bil kaznovan z denarno kaznijo (Vr VII 775/1924). Čeprav so bili ti incidenti manjši in brez večjih posledic, so dodatno potrjevali napeto razmerje med duhovščino in predstavniki državne oblasti.

Skupno vsem tem primerom je, da so duhovniki in cerkveni uslužbenci v očeh oblasti prestopili mejo med verskim delovanjem in politično provokacijo. Njihove izjave in geste zato niso bile obravnavane kot individualni prekrški, temveč kot kolektivno nevarne, saj so prihajale od oseb z moralno in družbeno avtoriteto. S tem so duhovniki med izobraženci v mariborskem okrožju, ki so se sicer neposrednih kritik oblasti običajno znali vzdržati, predstavljali specifično izjemo.

4. Anton Korošec med podporo in kritiko: duhovnik v politiki pred sodiščem

Zgornji primeri ponazarjajo, da so se duhovniki in cerkveni sodelavci pogosto znašli v položaju, kjer je meja med pastoralno avtoriteto in politično provokacijo postala predmet sodne obravnave. Vendar pa se nadzor oblasti ni ustavil le pri kritiki kralja, državnih praznikov ali posameznih sodnikov. Posebno pozornost so namenjali

tudi odnosu do dr. Antona Korošca – najvidnejšega slovenskega politika in hkrati duhovnika, čigar položaj je bil v očeh oblasti izjemno občutljiv.

V sodnih spisih mariborskega okrožja se tako pojavljata dve plati istega vprašanja. Na eni strani imamo primere, kjer so bili duhovniki kazensko preganjani, ker so Korošču v času njegovih napetih odnosov z beograjsko vlado javno izražali podporo. Njihova lojalnost voditelju Slovenske ljudske stranke je bila razumljena kot politična provokacija in kot potencialna nevarnost za enotnost države. Na drugi strani pa srečamo številne zadeve, kjer so se pred sodiščem znašli državljani, ki so Korošca kritizirali – pogosto prav v njegovi vlogi duhovnika v politiki. Takšne kritike so bile razumljene kot žalitev in bogokletna satira, saj so napadale simbolno figuro, ki je združevala tako cerkveno kot politično moč.

Tako sodni spisi ne razkrivajo le represije nad posamezniki, ampak predvsem politično občutljivost okoli osebnosti Antona Korošca. V očeh oblasti in javnosti ni bil zgolj politik, temveč predvsem duhovnik v politiki – zato so bile tako pohvale kot kritike njegove osebe razumljene kot politično subverzivne in so kot takšne postale predmet sodnega nadzora.

4.1 Podpora dr. Antonu Korošču kot politična provokacija

Sodni spisi iz mariborskega okrožja kažejo, da je podpora dr. Antonu Korošču v tridesetih letih pogosto vodila v kazenske postopke. Čeprav je bil Korošec ena osrednjih političnih osebnosti slovenskega prostora in dolgoletni predsednik Slovenske ljudske stranke, so bile njegove napete vezi z režimom v Beogradu razlog, da so oblasti na vsakršno izraženo simpatijo do njega gledale zadržano in sumničavo. Posebej problematična je bila podpora, ki je prihajala iz cerkvenih krogov, saj je dodatno potrjevala trdno vez med klerom in katoliško politiko (Rahten 2022; Ratej 2022).

Primer, ki nazorno pokaže prepletenost Cerkve in politike, je ovadba proti dekanu Francu Gomilšku iz Krčevine pri Ptuju. Gomilšek je namreč sodeloval pri organizaciji zbiranja podpisov, ki so bili uradno predstavljeni kot čestitka dr. Korošču ob 60. rojstnem dnevu. Vendar so preiskave pokazale, da je šlo za politično bolj obremenjeno pobudo, saj so nekateri podpisniki izjavili, da so podpise razumeli kot podporo Koroščevi vrnitvi na oblast – in celo kot zagovarjanje odcepitve Slovenije ali vrnitve pod Avstrijo. Čeprav obtožnica proti Gomilšku ni bila vložena, primer razkriva, kako so bile tudi simbolične in na videz nedolžne pobude razumljene kot nevarne politične geste, če so bile povezane s Koroščem (Kzp 785/1932).

Še bolj neposreden primer političnega angažmaja iz cerkvenih krogov predstavlja čevljar Ivan Habjanič iz Noršincev, ki je po atentatu na kralja Aleksandra izjavil, da bo oblast odslej v rokah »klerikalne vlade« in da bi bil Korošec najboljši »kralj za Slovence«. Habjanič je ob tem zagovarjal tudi obnovo Orlov in oblikovanje vlade, ki bi bila v rokah škofov. Zaradi tovrstnih izjav je bil obsojen na zaporno kazen – sodstvo je namreč v njegovih besedah videlo neposreden znak politične nelojalnosti in prizadevanja za cerkveno oblast. Čeprav Habjanič ni bil duhovnik, temveč obrtnik, je bila njegova argumentacija izrazito klerikalna in je odražala širši

diskurz, ki ga je v tistem času spodbujal del katoliškega tabora (Kzp V 1344/1934).

V podporo Korošču so nastopali tudi posamezni cerkveni uslužbenci, kot je bil organist Ivan Brecl iz Krčevine. Ta je v gostilni v Ranci zaničeval Sokole in jih odklanjal kot nasprotno gibanje, ob tem pa Korošca povzdigoval kot pravega predstavnika slovenstva. Zaradi svojih izjav je bil denarno kaznovan, kar kaže, da so bile lahko predmet sodnega nadzora tudi opazke v vsakdanjem pogovoru – če so bile politično usmerjene (Kzp VI 966/1933).

Zanimiv je tudi primer Velenjčana Rafaela Cokana. 19-letni vajenec v drevesnici, zaposlen v Kamnici pri Mariboru, je bil obdolžen zaradi pisma o razmerah v državi s kritično vsebino, ki ga je poslal ženi Micki Cokan, kuharici v javni kuhinji v Sušku pri Ilirski Bistrici. V pismu je izrazil podporo Korošču in pozival k spremembam v državi; kritičen je bil do omejevanja prosvetnega življenja v državi. Sprašuje jo, kako je v šoli in če imajo vrt – da bi ji lahko iz vrtnarije poslal kakšno vrtnico, da jo posadi. Potem pa nadaljuje:

> »Pa še sledeče ti moram sporočiti. Da so raspostili prosveto v Ljubljani in Mariboru. Kakor tudi vsa prosvetna društva. Tudi v Št. Ilju so zaprli dvorano in ne smejo nobene igre več prirediti. Kakor tudi tu na Kamnici. Ravno v nedeljo smo mislili igrati eno igro pa so ravno včeraj nam prepovedali. Smo že prej agitirali za to igro. Pa po vsej Jugoslaviji bojda tako delajo. Bog se nas usmili. Kamniški g. župnik so bili včeraj ravno pri nas in so rekli, da bodo še cerkve pričeli zapirati. Tako daleč pa menda ja ne bo prišlo. Pa če bo pa bomo Katoličani ostali zvesti Bogu. Saj je rekel Bog Svetemu Petru. Peter ti si skala in na to skalo bom jaz zidal cerkev in peklenska vrata jo ne bodo premagala. In zato se ne smemo kaj hudega bati. In saj molimo: zgodi se tvoja volja /…/ Živel naš g. dr. Anton Korošec.« (Kzp X 334/1933)

Orožniki so pismo prestregli, Cokan je na zaslišanju priznal, da je bil pri pisanju nepremišljen, »trdno prepričan, da pismo ne bo prišlo v roke kakemu nepoklicanemu… jaz pa sem v svoji mladostni neizkušenosti verjel govoricam, da je dr. Korošec mučenik.« Postopek je bil kasneje umaknjen (Kzp X 334/1933).

4.2 Korošec kot duhovnik v politiki – kritike in satira pred sodiščem

Čeprav je bil Anton Korošec od dvajsetih let naprej eden najvplivnejših slovenskih politikov, ga ljudje niso dojemali le kot državnika, temveč tudi kot duhovnika. Prav ta dvojna identiteta je povzročala, da so kritike na njegov račun iz politične pogosto prehajale v versko sfero in bile zato v očeh oblasti še toliko bolj občutljive.[3] Sodni spisi iz leta 1936 kažejo, da so bile oblasti pripravljene ukrepati tudi proti posameznikom z družbenega roba, kadar so njihove izjave zadevale Korošca kot simbol cerkveno-političnega vpliva.

Prvi primer je krošnjar Jakob Propust, ki je v vinjenem stanju v gostilni pri Juršincih napadal oblast, klel bana in kralja, nato pa se lotil tudi Korošca. Izjavil je, da

[3] Za več o tem glej Maver in Friš 2018.

kot duhovnik nima kaj iskati v politiki, in ga posmehljivo obrekoval, da je »poročen z neko rusko babo«. Čeprav gre očitno za provokativen izpad v gostilniškem okolju, so ga orožniki aretirali, saj je kritika duhovnika v politiki pomenila žalitev enega najvplivnejših slovenskih ministrov in hkrati simbolni napad na vez med Cerkvijo in državo (Kzp VII 898/1936).

Drugi primer predstavlja berač Anton Marucelj s Fale, ki je istega leta grozil, da bo »falsko graščino spremenil v prah«, obenem pa zahteval odstranitev Korošca iz vlade. Čeprav je bil njegov položaj družbeno marginalen in je bila izjava bolj plod osebnega nezadovoljstva kot političnega načrtovanja, je bila vseeno predmet kazenskega pregona. Oblasti so ga obravnavale ne le kot berača in motilca javnega reda, temveč kot posameznika, ki napada simbol državne politike (Kzp VI 930/1936).

Najbolj izrazit primer prepletanja religiozne satire in politične kritike pa predstavlja rokopis z naslovom *Nova veroizpoved,* ki ga je posedoval čevljar Edvard Perklič. V njem je bila oblikovana parodija na krščansko veroizpoved, v kateri je Korošec upodobljen kot božanstvo korupcije in utelešenje propadle Jugoslavije. Besedilo je združevalo bogokletno ironijo in politično kritiko:

> »Verujem v vsemogočnega Korošca, stvarnika Jugoslavije, spočetega v Rimu, rojenega v Prlekiji, ki je trpel v semenišču ter nato šel v Beograd, ker sedi na desnici boginje korupcije…« (Kzp X 1241/1936)

Čeprav avtorstvo ni bilo potrjeno, je že samo posedovanje takšnega teksta zadostovalo za ovadbo. S tem se kaže, kako občutljivo je sodstvo reagiralo na satirično povezavo med verskimi in političnimi simboli (Kzp X 1241/1936).

Vsi ti primeri kažejo, da Korošec v očeh ljudi ni bil ločen od svoje duhovniške identitete. Kritika njegove politike je pogosto nastopala v obliki obtožb proti »duhovniku v politiki« ali pa bogokletne satire, ki je izzivala tako cerkveno kot tudi državno avtoriteto. Prav zato so oblasti kritike Korošca obravnavale kot politično subverzivne in jih preganjale, četudi so prihajale od posameznikov brez prave politične teže. Korošec je bil tako v mariborskih sodnih spisih več kot le politik – bil je simbolna figura, katere podoba duhovnika v vladi je slovensko družbo polarizirala in sprožala odzive, ki so se lahko končali tudi pred sodiščem.

Korošec pa ni bil edino področje, kjer se je lomila meja med vero, politiko in državo. Podobne napetosti so se odvijale tudi v mladinskih in športnih društvih, ki so prerasla svoje prvotne kulturno-telovadne okvire in postala prizorišča ideoloških spopadov. Najizraziteje se je ta razkol kazal v rivalstvu med sokolskimi društvi in katoliškimi Orli, kjer je vsakdanja telovadba dobila pomen politične deklaracije in družbenega opredeljevanja.

5. Sokoli in Orli kot prizorišče političnih obračunov

V obdobju med obema vojnama so mladinske organizacije na Slovenskem prerasle

okvire športnega in kulturnega udejstvovanja in postale orodje politične mobilizacije. Najizrazitejši razkol je potekal med liberalno in državno podprto sokolsko organizacijo ter katoliškimi Orli, ki so v slovenskem prostoru predstavljali alternativo uradni ideologiji Kraljevine Jugoslavije.

Sokoli so bili v očeh oblasti simbol jugoslovanske enotnosti, lojalnosti kralju in državnemu redu. Zato so bili pogosti sodni postopki proti tistim, ki so Sokole kritizirali ali jih posmehljivo omalovaževali, saj je oblast takšne napade razumela kot neposredno ogrožanje državne ideologije. Orli so bili s svojim poudarjanjem katoliške vere, slovenske narodne identitete in moralne vzgoje umeščeni v nasprotni tabor. Po njihovi prepovedi leta 1929 so se sodne oblasti usmerile predvsem v kazenski pregon posameznikov, ki so ohranjali vezi z orlovskim gibanjem ali izražali simpatije do njegovega programa (Pavlin 2014; Zec 2015; Troch 2019; Gangl 1931).

Sodni spisi mariborskega okrožja razkrivajo, da so se konflikti med Sokoli in Orli pogosto odvijali tudi na ravni vsakdanjih izjav, lokalnih dogodkov in osebnih sporov. Oblast je v takšnih primerih nastopala kot razsodnik, pri čemer so bili postopki proti kritikam sokolstva bistveno strožji, medtem ko so bili simpatizerji Orlov obravnavani kot subverzivni elementi in politični nasprotniki režima. Posebno vlogo so v teh sporih imeli duhovniki, ki so se kot idejni voditelji in podporniki mladinskih organizacij pogosto znašli v samem središču sodnih postopkov.

5.1 Sokoli kot simbol državne lojalnosti in duhovščina kot njihov kritik

Sokolsko gibanje je nastalo v 60. letih 19. stoletja na Češkem kot telovadno in kulturno društvo, ki je telesno vzgojo povezovalo z narodno-političnim prebujenjem. Cilj ni bil zgolj krepitev telesa, temveč tudi oblikovanje trdnega značaja, domoljubja in zavesti o pripadnosti narodu. Ideja se je hitro razširila po slovanskem svetu in leta 1863 je bilo v Ljubljani ustanovljeno prvo slovensko sokolsko društvo. Sprva je bilo usmerjeno zlasti v narodno prebujanje znotraj habsburške monarhije, a se je v naslednjih desetletjih razvilo v gibanje, ki je s telovadbo, javnimi nastopi in simboliko krepilo narodno zavest in skupinsko disciplino (Balikić Newman in Pojar 2023; Nolte 1993; Jandásek 1932; Evans, Weston in Cornwall 2007; Pavlin in Čustonja 2018).

Po prvi svetovni vojni in razpadu Avstro-Ogrske so se slovenski, hrvaški in srbski sokoli združili v Jugoslovansko sokolsko zvezo, ki je v novi Kraljevini SHS dobila posebno politično vlogo. Sprva je bila še vedno društvo, a z močno naklonjenostjo centralistični politiki beograjskega dvora. Z uvedbo šestojanuarske diktature leta 1929 je kralj Aleksander I. gibanje dokončno postavil v središče državne simbolike: Sokoli so tako postali njegov osebni projekt in orodje za utrjevanje enotne jugoslovanske identitete. Telovadni nastopi, množični zleti in parade so dobili pomen državnih proslav, na katerih se je manifestirala lojalnost monarhiji, hkrati pa so Sokoli s svojo organizacijsko mrežo segali globoko v lokalne skupnosti.

Takšna politična in simbolna vloga je sprožala tudi odpor, zlasti pri katoliški duhovščini. Katoliški Orli, ustanovljeni leta 1906 kot konkurenčno telovadno društvo, so v sokolstvu videli sekularno, liberalno in včasih protiklerikalno gibanje, ki je

spodkopavalo cerkveno avtoriteto. Duhovniki so v pridigah in pri verouku vernike pogosto opozarjali, naj se Sokolom ne pridružujejo, kar je oblast razumela kot napad na državno idejo in simbol kraljeve enotnosti. Tovrstne izjave so pogosto privedle do sodnih postopkov proti duhovnikom, pri čemer se verski spor ni presojal kot notranje (tj. cerkveno) vprašanje, temveč kot politični prekršek.

Med leti 1914 in 1940 je v mariborski sodni pristojnosti potekalo vsaj 45 kazenskih postopkov, ki so obravnavali kritične, posmehljive, žaljive ali posredno subverzivne izjave zoper sokolsko organizacijo. Ti postopki razkrivajo pomemben uvid v ideološko funkcijo Sokola v obdobju Kraljevine SHS in pozneje Jugoslavije, pa tudi v odnos med državo, Cerkvijo in posamezniki, ki so se v vsakdanjem govoru ali v okviru religioznih nastopov od sokolske ideologije distancirali. Večinoma gre za posamezne izjave ali simbolna dejanja, ki so bila obravnavana kot kazniva po členih o žalitvi, rušenju javnega reda ali ščuvanju, pri čemer so bili obdolženci pogosto duhovniki, gostilničarji, obrtniki in kmetje. Pomembno je, da so bila ta dejanja razumljena kot napad ne le na sokolsko društvo kot telovadno organizacijo, temveč na simbolno utelešenje državne enotnosti in lojalnosti do režima. V nadaljevanju so predstavljeni posamezni primeri, pri katerih so v ospredju duhovniki in verski spori med katoliško Cerkvijo in sokolskim gibanjem. To je bil dolgoleten, globoko zakoreninjen konflikt, ki je presegal posamezne incidente, saj je bil prežet z ideološkimi, kulturnimi in organizacijskimi nasprotji. Sokoli so predstavljali sekularno, liberalno usmeritev in utelešali centralistično jugoslovansko državno idejo, medtem ko je katoliška duhovščina zagovarjala versko avtonomijo, krepitev narodne identitete ter opozarjala na nevarnost moralnega in verskega razkroja.

Ti spopadi so bili še posebej izraziti na podeželju, saj so se dogajali v majhnih skupnostih, kjer so imeli duhovniki na javno mnenje in družbeno življenje močan vpliv. Vsaka izjava, ki je Sokole povezovala z brezboštvom, moralnim propadom ali protikrščanskimi prepričanji, je lahko služila kot podlaga za kazenski pregon po zakonodaji, namenjeni zaščiti javnega reda in državne ideologije.

Obtožbe se pogosto nanašajo na pridige, verouk ali zasebne pogovore, kjer so duhovniki – včasih pa tudi laični verniki – Sokole odkrito označevali za ‚brezbožne‘, ‚protikrščanske‘ ali ‚moralno kvarne‘. Taka retorika je izhajala iz zavestnega nasprotovanja liberalnemu in centralističnemu značaju sokolstva, ki ga je Cerkev dojemala kot grožnjo svoji avtoriteti in verskemu življenju skupnosti.

Za državo pa so bile te izjave nevarne iz drugega razloga – oblasti so jih razumele kot neposreden napad na simbol jugoslovanske enotnosti in lojalnosti kraljevi oblasti. Tako je prišlo do stanja, ko je verska kritika postala politično dejanje, vredno sodnega pregona. To pojasnjuje tudi, zakaj so spisi o Sokolih – v primerjavi z Orjuno – v precejšnji meri podeželski: konflikt je bil namreč v temelju kulturno-verski, a je v pravnem okviru dobil izrazito politično dimenzijo.

5.1.1 ‚Črvive fige‘ in izključitev iz Marijinih družb

Na božični večer leta 1930 je v cerkvi v Cerkvenjaku odmevala pridiga, ki je kmalu postala predmet kazenskega pregona. Župnik Franc Škof je staršem svetoval,

naj otroke pošiljajo k večernicam, »ne pa k Sokolom«, ki jih je slikovito označil za »črvive fige« in »nekristjane«. Njegove besede so bile jasen odmev klerikalnega odpora do gibanja, ki ga je Cerkev dojemala kot brezbožno in politično nevarno.

Spor se je še poglobil naslednje leto, ko je na shodu Marijinih družb župnik iz članstva izključil dekleta, ki so bila pri Sokolih, in to z utemeljitvijo, da so njihove kopalne obleke za katoličanke neprimerne. Dogodek je med verniki povzročil precejšnje razburjenje, nekaj udeležencev pa se je odločilo za prijavo župnikovih besed in dejanj oblastem.

Proces, ki je sledil, ni bil osredotočen zgolj na vprašanje oblačil ali družbenih navad, ampak je nosil močno politično sporočilo. Duhovnikove pridige in organizacijske ukrepe so oblasti namreč razumele kot sistematičen poskus spodkopavanja ugleda Sokolov, ki so bili v očeh režima nosilci jugoslovanske državne ideologije. Sodba mu je naložila pogojno denarno kazen v višini 1800 dinarjev, s preizkusno dobo dveh let – opozorilo, a ne najostrejša sankcija, morda tudi zaradi njegovega položaja v skupnosti.

Primer nazorno kaže, kako so se verski in politični spori prepletali na ravni vsakdanjega življenja: cerkvena prižnica je postala prostor ideološkega boja, cerkvene organizacije pa polje, kjer so se lomila kopja med tradicijo in državno lojalnostjo (Kzp V/3620/1931).

5.1.2 Vztrajni nasprotnik Sokolov v Apačah

Kaplan Jožef Kranjc, rojen leta 1876 v Radislavcih, se je v sodnih spisih pojavil že leta 1932, ko je v Voličini pri verouku in pogovorih z mladimi svaril, naj se ne udeležijo sokolske prireditve s tamburaškim zborom, saj jim bodo »vzeli vero«. Sokolskemu pozdravu »zdravo« je nasprotoval z besedami, da je to »pozdrav za hlapce«, in zahteval uporabo pozdrava »hvaljen Jezus«. Zaradi ovadbe staroste Milana Goriška je bil obsojen na en mesec zapora in 500 dinarjev kazni (Kzp V/1399/1932).

Tri leta pozneje se je znova znašel pred sodiščem, tokrat zaradi izjav na avtobusu iz Gornje Radgone proti Apačam. Po pričevanju navzočih je trdil, da so se v Jugoslaviji zbirali podpisi za Hitlerja in Habsburžane, za kar naj bi bili krivi »naši Sokoli« in minister Kramer, rekoč: »Naši Sokoli so nas tako daleč spravili.« Njegove besede so slišali učiteljica Milica Zamuda, rečni mojster Franc Smrekar in uradnik Simčič. Kranjc je zanikal, da bi omenjal Sokole, učiteljica je izjavila, da je bil vinjen in da ni jasno slišala, medtem ko je bil Smrekar, s katerim Kranjc ni bil v dobrih odnosih, glavna priča. Zaradi nejasnih pričevanj in osebnih zamer je bil župnik oproščen (Kzp VII/722/1935).

Oba primera kažeta na Kranjčevo dosledno in večletno nasprotovanje Sokolom, ki se ni omejevalo le na verske ali simbolne vidike, temveč je vključevalo tudi politične obtožbe v času, ko so bile omembe Hitlerja in Habsburžanov posebej občutljive. Hkrati pa ponazarjata, kako so na izid sodnih postopkov vplivali osebni odnosi in spori med posamezniki.

5.1.3 Poslanica banske uprave proti pastirskemu pismu

Pregon duhovnikov zaradi nasprotovanja Sokolom se zaostri po svečnici leta 1933. Kraljevska banska uprava Dravske banovine je namreč 4. februarja 1933 izdala okrožnico, naslovljeno na ravnateljstva meščanskih in učiteljskih šol, ravnateljstva srednjih šol ter na mestne, okrajne in krajevne šolske nadzornike (Kzp VII 1349/33). Povod zanjo je bilo pastirsko pismo škofovske konference v Zagrebu, izdano 17. novembra 1932 in brano v večini slovenskih župnij 8. januarja 1933. V pastirskem pismu so škofje ostro nastopili proti sokolstvu in njegovemu ustanovitelju dr. Miroslavu Tyršu, kar je banska uprava označila kot napad, poln neresničnih očitkov. Ti naj bi bili ovrženi z uradno okrožnico, izdano v imenu državnih oblasti.

V okrožnici je banska uprava poudarila, da je Savez Soko Kraljevine Jugoslavije ustanovljen z zakonom z dne 5. decembra 1929 in da ta zakon določa njegovo nalogo – telesno in moralno vzgojo državljanov ter vzpostavljanje viteške organizacije, ki povezuje državljane kraljevine. Sokolstvo naj bi bilo po zakonu odprto vsem državljanom, tako tudi učencem narodnih, meščanskih, srednjih in učiteljskih šol, njegovo delovanje pa da temelji na spoštovanju državnih zakonov, reda in discipline. Banska uprava je v nadaljevanju zapisala, da morajo šolstvo, učitelji in dijaki v sokolskih vrstah dejavno sodelovati ter spoštovati vse veljavne odredbe, ki zadevajo sokolsko delo. Organizacija Sokol Kraljevine Jugoslavije je bila opisana kot gibanje, ki s trdnim in nesebičnim delom jugoslovanski narod dviga v moralnem in telesnem pogledu, širi bratstvo in slogo ter utrjuje narodno in državljansko zavest. Sokolstvo naj bi ne poznalo sovraštva in delitev, ampak učilo narodno edinost, spoštovanje verskega prepričanja vsakega posameznika ter gojilo vse, kar je dobrega in plemenitega. Okrožnica je šolstvu naložila, naj sokolsko dejavnost podpira, mladino pa spodbuja k vključevanju v društva, saj da Sokolstvo vzgaja v duhu jugoslovanskega narodnega in viteškega ideala. Ob koncu je banska uprava navedla še besede kralja Aleksandra I. na praznovanju sokolskega leta v Beogradu leta 1930 – da naj bo »Sokol Kraljevine Jugoslavije zdrav vzgojevalec mladine, boronik bratstva in ljubezni, bojevnik velike jugoslovanske misli in nosilec viteškega ter nacionalnega duha« (Kzp VII 1349/33). Okrožnica, ki jo je podpisal ban dr. (Drago) Marušič, je bila poslana šolskim oblastem z navodilom, naj se prebere učiteljskemu zboru in po potrebi tudi razloži učencem v vseh šolah. A vsi duhovniki banski poslanici niso sledili, temveč so ostali zvesti opozorilom iz škofovskega pastirskega pisma.

5.1.4 »Prišli bodo s krampi nad cerkev«

V Črni je po banski poslanici kaplan Adolf Adamič med veroukom denimo otroke svaril, da bodo Sokoli »prišli s krampi nad cerkev«, s čimer je želel ponazoriti njihovo domnevno brezbožnost in sovražnost do Cerkve. Napetosti je stopnjeval tudi izven učilnice: po cerkveni slovesnosti v Podpeci je pozval k petju pesmi »Slovenec sem« in ob tem dodal, da »se s Srbi ne da živeti«, kar je pomenilo neposredno zavračanje jugoslovanske državne skupnosti. Take izjave so oblasti razumele kot odkrito nasprotovanje tako sokolski ideologiji kot samemu temelju državne enotnosti.

Sodni senat mu je naložil denarno kazen v višini 500 dinarjev, kar je bilo glede na politično občutljivo vsebino njegovih besed razmeroma blago – verjetno zaradi njegovega duhovniškega statusa. Primer razkriva, kako sta se klerikalni odpor in protidržavna retorika prepletala ter kako je oblast duhovnikovo avtoriteto razumela kot posebej nevarno, saj so njegove besede imele vpliv na mlajše generacije (Kzp XII/861/1933; Kzp VII/1433/1933).

5.1.5 Žalitev Sokolov z verskimi in etničnimi opazkami na svatbi

V istem času leta 1933 je na Velki med svatbo v gostilni Antona Jaušnika prišlo do incidenta, pri katerem je organist Maks Kramberger Sokole javno žalil. V družbi je članom Sokola rekel: »Vi Sokoli ste protestanti, najboljše je, da greste gori k župniku in se daste prepisati iz katoliške v protestantsko knjigo oz. da prestopite k protestantom ali k judom. Če ste katoličani, pokažite mi vaša pravila.« Takšne besede, izrečene v zaprtem lokalnem okolju, kjer je bil organist pomembna in vplivna osebnost, so dobile politično razsežnost. Sokolski član Štefan Weingerl je zaradi teh izjav podal ovadbo, sodišče pa jih je prepoznalo kot napad na Sokole in posledično na jugoslovansko ideologijo, tako da je bil Kramberger zaradi povzročitve »nesporazumljenja zoper državno ustanovo Sokola kraljevine Jugoslavije« obsojen na plačilo 1000 dinarjev Državnega kaznilnega sklada. Višina kazni odraža resnost žalitev, še posebej zaradi vključitve verskih obtožb, ki so dodatno zaostrovale odnose med klerikalnimi in sokolskimi krogi na podeželju. (Kzp V/519/1933)

5.1.6 Verske obsodbe Sokolov pri spovedi

Prav tako leta 1933 je na Studencih kapucin Viktor Šivavec, znan kot pater Viktorin, rojen leta 1896 v Strmcu pri Krškem, med velikonočno spovedjo učencu dejal, da so Sokoli »antikristi« in »antislovenci«. Po navedbah ovadbe mu je odvezo podelil le s težavo; besede so bile razumljene kot neposreden napad na sokolsko organizacijo in njeno idejno zaledje. Primer je bil občutljiv tudi zato, ker so bile izjave izrečene v okviru spovedi, na katero se je Šivavec v obrambo skliceval, navajajoč načelo molčečnosti. Sprva je bil oproščen, a je tožilstvo doseglo ponovno sojenje. V ponovljenem postopku je bil obsojen na sedem dni zapora in 420 dinarjev denarne kazni, pogojno za eno leto. Primer razkriva, kako so tudi zasebni in zaupni zakramenti lahko postali prizorišče politično obravnavanih izjav, in ponazarja ostrino spora med katoliško Cerkvijo in sokolskim gibanjem na Studencih (Kzp VII/977/1933).

V Slovenski Bistrici pa je zaradi svojega odkritega nasprotovanja Sokolom tarča kazenskega pregona postal župnik Ivan Šolinc. Tudi pri njem je bil povod za kazenski pregon neupoštevanje poslanice banske uprave, ki se je odzivala na pastirsko pismo, ki je opozarjalo, da sokolske dejavnosti učence odvračajo od obiskovanja maše. A župnik Šolinc poslanici banske uprave ni nameraval slediti, ampak je ostal zvest pastirskemu pismu, ki ga je s prižnice prebral nekaj tednov prej. Sokolom je še naprej očital škodljiv vpliv na mladino in njihovo neskladnost s katoliškimi vrednotami. Učenec, ki je bil pri njem pri spovedi aprila 1933, je denimo pričal, da je spovednika vprašal, ali je biti Sokol greh, ta pa mu je odgovoril: »Sokoli so antikri-

sti in antislovenci. Sokol Kramer nas prodaja v Beograd Srbom. Če hočeš odvezo, moraš odstopiti od Sokola.« Ker je učenec odklonil in rekel, da bo šel po odvezo k drugemu spovedniku, mu jo je Šolinc vendarle dal, a z opozorilom, naj dobro pazi, da ga Sokoli ne bodo zapeljali. Drug učenec je pričal, da je zaradi sokolskega tečaja zamudil k maši, pri čemer se je župniku prišel posebej opravičit, ta pa ga je vseeno vpisal v knjigo manjkajočih z vprašanjem »Ali te bo Sokol zveličal?«. Oblasti so njegovo ravnanje razumele kot poskus spodkopavanja ugleda organizacije, ki je bila v očeh režima simbol jugoslovanske enotnosti in državne lojalnosti. Sodišče mu je naložilo globo 1500 dinarjev, vendar pogojno za dve leti, kar nakazuje, da je bil vpliv njegove besede v lokalni skupnosti prepoznan, a da so bile hkrati upoštevane olajševalne okoliščine njegovega duhovniškega položaja (Kzp VII/1349/1933).

5.1.7 Incident na veselici v Šentilju

Septembra 1935 je šentiljsko dvorišče osnovne šole postalo prizorišče napetega obračuna med sokolskim in cerkvenim taborom. Med veselico, ki jo je priredila sokolska četa, se je okrog polnoči pojavila skupina cerkvenih pevcev, ki jo je vodil kaplan Anton Raušel. Vzklikali so »Živela svoboda!« in prekinili program, s čimer so hitro pritegnili pozornost zbranih.

Ko se je banovinski zdravnik dr. Sentočnik skušal z Raušlom rokovati, je kaplan to ostro odklonil: »Barabam jaz roke ne dam,« nato pa Sokole označil za »smrkavce, lažnivce, hinavce«. Incident je še dodatno podžgalo, da sta Raušel in organist Avgust Rakuša vztrajno zavračala nadaljnje sodelovanje, hkrati pa naj bi s svojimi pripombami in vedenjem namenoma povzročala zmedo na prireditvi.

Oblasti so v takšnih izpadih videle načrtno spodkopavanje ugleda Sokolov, ki so bili uradni simbol jugoslovanske enotnosti, ter grožnjo javnemu redu. Sprva je bilo osumljenih kar 24 oseb, a se je kazenski pregon na koncu osredotočil zgolj na Raušla in Rakušo. Zaradi pomanjkanja zanesljivih dokazov in ker pri dogodku ni prišlo do hujših posledic, se je postopek končal brez obsodbe (Kzp X/1126/1935).

Sodni primeri iz mariborskega sodnega okrožja torej jasno razkrivajo, da so bili Sokoli v očeh oblasti nedotakljiv simbol jugoslovanske državne ideologije, vsaka kritika njihovega delovanja pa razumljena kot politična provokacija. Besede duhovnikov in cerkvenih sodelavcev – od pridig in spovedi do izjav na javnih prireditvah in celo v zasebnih pogovorih – so pogosto presegale okvire verskega nagovora in bile zato obravnavane kot neposredni napadi na temelje državne enotnosti.

Obravnavani sodni postopki kažejo, da so bile kazni razmeroma nizke – od denarnih glob in pogojnih kazni do kratkih zapornih sankcij. Toda tudi tam, kjer so se postopki končali brez obsodbe, je že sam sodni pregon deloval kot opozorilo in kot mehanizem nadzora nad duhovščino. Oblast je s tem jasno sporočala, da bo ugled Sokolov kot državotvorne organizacije strogo varovala in da bo vsako odkrito nasprotovanje klerikalnega tabora obravnavano kot politično sporno dejanje.

Skupna značilnost vseh zadev je, da besede duhovščine niso bile razumljene kot osebna mnenja, temveč kot sporočila z močno moralno in družbeno težo ter vplivom na mlajše generacije in širšo skupnost. V tem smislu sodni spisi pomenljivo odražajo, kako se je konflikt med katoliško Cerkvijo in državno ideologijo Kraljevine Jugoslavije odvijal tudi na ravni lokalnih sporov, kjer so bili tudi duhovniki ena od tarč represivnega aparata.

Toda zgodba se s tem ne zaključi. Če so bili Sokoli varovani kot državno lojalno gibanje, je bil njihov ideološki antipod – katoliški Orli – obravnavan kot nevarna opozicija. Medtem ko je oblast kritike sokolstva kazensko preganjala, pa je podpornike Orlov zasledovala in obravnavala kot subverzivne elemente. V nadaljevanju zato osvetljujemo sodne spise, ki razkrivajo, kako je podpora prepovedani orlovski organizaciji – posebej v podeželskih skupnostih, kjer je bila vez s Cerkvijo najmočnejša – služila kot povod za kazenske postopke in orodje nadzora nad klerikalnim taborom.

5.2 Duhovščina in prepovedani Orli: kazenski pregon cerkvene mladine

Če so Sokoli v Kraljevini Jugoslaviji pomenili uradno zaščiten in državno podprt steber jugoslovanske enotnosti, so bili njihovi glavni ideološki nasprotniki – katoliški Orli – globoko zakoreninjeni v župnijah in katoliškem družbenem življenju. Orli so svojo identiteto gradili na povezovanju telesne vadbe z versko vzgojo in krščansko moralo, njihovo delovanje pa je bilo tesno povezano z rimskokatoliško Cerkvijo in posameznimi duhovniki, ki so v organizaciji prevzemali vodilne vloge.[4]

Po uvedbi šestojanuarske diktature leta 1929 so bili Orli razpuščeni in označeni kot politično nezaželeni. Za oblast so predstavljali nevarno konkurenco Sokolom, ki so po tem letu postali edina dovoljena mladinska telovadna organizacija in hkrati simbol jugoslovanske enotnosti. Prepoved je na podeželju, kjer so Orli delovali v župnijskih strukturah, pomenila neposreden poseg v družbeno tkivo. Duhovniki so se nenadoma znašli v vlogi nadzorovanih oseb – vsaka njihova beseda, simbolna gesta ali podpora mladini, ki je želela ohranjati orlovsko tradicijo, pa je lahko sprožila sodni postopek.

Sodni spisi iz mariborskega okrožja v letih 1930–1934 ponazarjajo, da so oblasti naklonjenost Orlom dojemale kot politično provokacijo. Kaplan Mirko Geratič je bil leta 1930 obtožen, da je osnovnošolce nagovarjal k izstopu iz sokolske čete, pri čemer naj bi Sokole označil za »brezverce« in »boljševike« – čeprav je bil na koncu zaradi pomanjkanja dokazov oproščen (Kzp/1477/1930). Tudi organist Janko Rakuša iz Sv. Marjete ob Pesnici se je leta 1933 znašel pred sodiščem zaradi obtožbe, da je na orgle zaigral orlovsko himno. Sam je sicer trdil, da je šlo za Wagnerjevo skladbo, toda oblasti so v tem videle politično provokacijo. Ker pa dokazov za naklep ni bilo dovolj, je bil oproščen (Kzp VI/106/1933).

Dijak mariborske klasične gimnazije Ivan Krajnc (rojen leta 1914 v Šmarjah pri Jelšah) je bil obtožen razpečevanja letaka z naslovom „Mladina mladini“. Besedi-

[4] Več o tem Grašič in Matjašič (2006).

lo je vsebovalo ideološki poziv mladim, naj ostanejo zvesti katoliški veri in krščanski vzgoji in da naj zavračajo »brezbožne« vplive v mladinskih društvih. Ovadbo je podal njegov mlajši sostanovalec, ki je letak našel in ga izročil oblastem, kar kaže na ozračje medsebojnega nadzora tudi v zasebnih prostorih. Krajnc je posest letaka priznal, a zanikal, da bi ga sam razpečeval. Postopek je bil ustavljen, najverjetneje zaradi njegove mladosti in ocene, da dejanje ni imelo resne politične teže (Kzp X/1203/1933).

Še bolj zgovoren je primer že omenjenega čevljarja Ivana Habjaniča iz Noršincev, ki je po atentatu na kralja Aleksandra izjavil, da bi morala oblast preiti »v roke cerkvenih oseb« in da je čas za ponovno ustanovitev Orlov. Zaradi teh izjav je bil obsojen na 75 dni zapora, kar potrjuje, da so bile povezave med Cerkvijo, orlovsko ideologijo in politično kritiko za režim posebej nevarne (Kzp V/1344/1934).

Pregled teh primerov kaže, da Orli po letu 1929 niso izginili, temveč so kot simbol in kot ideja, ki je bila v lokalnih skupnostih tesno vezana na Cerkev in njene predstavnike, preživeli. Oblasti so bile zato pozorne na vsakršne oblike simbolne ali praktične podpore, še posebej kadar so izhajale iz župnijskega okolja. Duhovniki in cerkveni sodelavci so tako postali ključni akterji v konfliktu, v katerem je bila naklonjenost Orlom razumljena kot izraz politične nelojalnosti in protidržavne drže.

5.3 Sklepna primerjava: duhovščina med Sokolom in Orlom

Sodni spisi mariborskega okrožja iz tridesetih let razkrivajo dve različni, a povezani poti, po katerih so se duhovniki znašli pred sodiščem. V primeru Sokola je bil pregon usmerjen predvsem proti klerikom, ki so si drznili organizacijo, njene člane ali njeno idejno ozadje javno kritizirati. Ker so bili Sokoli uradni simbol jugoslovanske enotnosti in državne lojalnosti, je bila žalitev njihovega ugleda razumljena kot napad na same temelje državne ideologije. Duhovnikova beseda – bodisi na prižnici, pri spovedi ali pa celo v zasebnem pogovoru – je v očeh oblasti pridobila politično težo, ki jo je bilo treba nadzorovati in sankcionirati.

Pri Orlih je bila slika obrnjena. Ker so bili po letu 1929 prepovedani, je vsak znak naklonjenosti njihovi ideologiji veljal za protidržavno dejanje. Pregon ni bil usmerjen v diskreditacijo nasprotnikov, temveč v utišanje tistih, ki so z orlovskim gibanjem hoteli ohranjati vez – največkrat prav v cerkvenih krogih, kjer so Orli imeli svoje zaledje. Če so bile kritike Sokolov obravnavane kot kaznivo spodkopavanje državnega simbola, pa je bila podpora Orlom prepoznana kot vztrajanje pri prepovedani, klerikalno obarvani opoziciji.

V obeh primerih je bila skupna točka duhovščina. Njihov vpliv na vernike in mladino je oblast razumela kot nevarno politično orožje, ki bi lahko spodkopalo jugoslovansko enotnost. Zato so bili duhovniki – bolj kot drugi izobraženci – redno tarča sodnih postopkov: bodisi zaradi kritik Sokolov bodisi zaradi simpatij do Orlov. V sodnih spisih se tako zrcali osnovna napetost tega časa: spopad med državno ureditvijo in cerkvenim pravom, med državno ideologijo in cerkveno avtoriteto, ki je v vsakdanjih konfliktih dobil zelo konkretno, pravno obliko.

Sodni postopki, povezani z Orli, razkrivajo, kako globoko je bila katoliška mladina vpeta v spopad med klerikalnim in državnim taborom. Konflikt med Sokoli in Orli pa ni bil zgolj političen, temveč je odpiral tudi širša vprašanja verske pripadnosti in državne lojalnosti. Podpora Orlom je bila v očeh oblasti nevarna prav zato, ker je bila tesno povezana z duhovščino in katoliško vero, kar je dodatno krepilo vtis, da gre za ideološko nasprotovanje temeljem jugoslovanske državne ureditve.

Toda verska vprašanja se niso kazala samo v obliki prepovedanih mladinskih organizacij. V času, ko vera in država nista bili ločeni, je verska pripadnost sama po sebi pomenila politično stališče. Zato so se sodni postopki pogosto vrteli okoli bogokletja, verskih žalitev ali sporov med različnimi verskimi skupnostmi. Prav ti primeri, ki so segali od napetosti med katoličani in protestanti do kritik pravoslavne vere in pregona Jehovovih prič, tvorijo osrednje jedro naslednjega poglavja o verskih sporih in pregonih v mariborskem sodnem okrožju.

6. Verski spori in pregoni v mariborskem sodnem okrožju

Z oblikovanjem Kraljevine SHS in kasneje Kraljevine Jugoslavije je verska slika v SV Sloveniji postala bistveno bolj pestra kot prej. Združitev s Kraljevino Srbijo, priključitev Prekmurja in priseljevanje javnih uslužbencev iz južnih delov države na Štajersko so prinesli večjo prisotnost pravoslavne vere, ki sta ji pripadala tudi kralj in kraljica. Do tedaj povsem katoliški prostor se je moral prilagoditi sobivanju s protestantsko in pravoslavno skupnostjo ter z manjšimi verskimi gibanji, kot so Jehovove priče.

Ta sprememba pa ni bila občutljiva zgolj demografsko, temveč tudi politično in kulturno. Izjave, ki so omalovaževale pravoslavno vero ali katoliško Cerkev, še posebej če so se dotikale monarha, njegovih političnih zaveznikov ali cerkvenih dostojanstvenikov, so bile pogosto obravnavane kot napad na samo državno ureditev. V sodnih spisih mariborskega okrožja najdemo več primerov, kjer so bili obdolženci preganjani zaradi bogokletja, verske nestrpnosti ali širjenja prepovedane verske literature. Ti primeri razkrivajo, kako tesno sta bili v tem obdobju prepleteni verska pripadnost in lojalnost državi.

6.1 Bogokletje in žalitve katoliškega klera

Leta 1925 je v Mariboru odmeval primer brata in sestre, Friderika in Ljudmile Weitzl, ki sta bila obtožena bogoskrunstva. Po jutranji maši sta 14-letnik in 17-letnica hodila za duhovnikom, ki se je vračal v župnišče, in se pri tem smejala. Župnik, ki je menil, da sta se posmehovala njemu osebno in svetosti njegovega poslanstva, ju je ovadil. Brat in sestra sta trdila, da sta se smejala nekomu, ki se je na trg pripeljal z monociklom, in da duhovnik sploh ni bil predmet njunih šal. Mlada Mariborčana sta bila po posredovanju nadrejenega duhovnika oproščena, saj je bila ovadba umaknjena (Vr X 994/25).

Poseben odmev je istega leta imel tudi primer hlapca Ignaca Cvetka iz Tišine. Ta se je med procesijo s pokopališča proti cerkvi peljal z vozom, na katerem je imel sodčke piva. Namesto da bi počakal, da verniki odidejo mimo, je z vozom zapeljal kar skozi procesijo – leže na sodčkih, s cigareto v ustih – in se vedel nedostojno. S tem je po oceni oblasti žalil čustva vernikov in cerkveno prireditev, zato ga je župnik ovadil. Sodišče mu je izreklo tri tedne strogega zapora s težkimi pogoji: dvakrat tedensko trdo ležišče, dva dneva posta in en dan samice (Vr VIII 782/25).

Primera ponazarjata, da v Kraljevini SHS/Jugoslaviji nelojalnost ni bila razumljena samo kot politična, temveč tudi kot verska kategorija. Država je z inkriminacijo bogoskrunstva kazensko varovala ne le avtoriteto posvetnih oblasti, temveč tudi svetost vere in položaj Cerkve, ki je bila z državnim redom tesno prepletena. Posledično so bila dejanja, kot so smeh za duhovnikom ali neprimerno vedenje med procesijo, razumljena kot spodkopavanje širšega družbenega in moralnega reda. Stroga kazen za hlapca Ignaca Cvetka razkriva, da je bila tudi verska nelojalnost pojmovana kot politična nevarnost, ki jo je bilo treba zatreti s podobno odločnostjo kot neposredno kritiko kralja ali države.

6.2 Katoliško–protestantski spori

V Prekmurju, kjer so živeli številni protestanti, so se po priključitvi območja Kraljevini SHS pojavile napetosti glede verskih pravic. Leta 1926 je prišlo do spora v Šalovcih, ko so katoličani dobili nov zvon. Gerent občine je poskrbel, da ga je prišel blagoslovit katoliški duhovnik Jožef Klekl. To je razjezilo večinsko protestantske občane, ki so menili, da bi moral zvon blagosloviti tudi pastor. Dodatno je bil res povabljen še protestantski duhovnik iz Hodoša, a spor se s tem ni končal.

Na občinskem sestanku so protestantski odborniki, med njimi tudi Aleksander (Šandor) Herceg, 60-letni občinski odbornik in posestnik, gerenta verbalno napadli: »Kaj si ti tem šmrklavim popom pustil zvon blagosloviti? Tvojega papinskega boga, šamlavega, baklovega, hitni cigan.« V spisu je obsežno opisana tudi razdelitev štirih majhnih zvonov v občini, od katerih naj bi trije pripadali protestantom, eden pa katoličanom, a načeloma vendar vsi vsem. Gerenta Štefanca je zadeva tako razjezila, da je vložil ovadbo. Herceg je bil obsojen na 300 dinarjev denarne kazni (Vr VIII 748/26).

Primer iz Šalovcev kaže, da so verske napetosti v Prekmurju po priključitvi območja Kraljevini SHS hitro dobile tudi politično razsežnost. Zvon kot simbol skupnosti in verske pripadnosti je postal predmet spora, v katerem so se prepletale verske identitete, občinski interesi in vprašanje lojalnosti državi. Obsodba Aleksandra Hercega razkriva, da je oblast z varovanjem katoliškega obreda posredno podpirala prevladujočo vero in s tem tudi politično usmeritev, kar je bilo dojeto kot zanemarjanje pravic luteranske skupnosti. Tudi v tem primeru se potrjuje, da je bila nelojalnost Bogu, Cerkvi ali verskim simbolom razumljena kot oblika politične nelojalnosti, ki jo je država preganjala podobno kot neposredno kritiko kralja in režima.

6.3 Odnos do pravoslavne vere

Z nastankom Kraljevine SHS je pravoslavna vera postala del verskega življenja na Štajerskem. Nekateri katoličani so jo sprejemali s pridržkom, kar se je pogosto kazalo v žaljivih izjavah.

Poleti 1926 je v gostilni v Bučkovcih Neža Kolmanič, nepismena vdova iz Sv. Trojice, po dveh kozarcih vina izjavila:

> »Scheiss der Hund auf den König und die Königing. Kralj od nas živi, a ne mi od njega… Aleksander si med nas ne upa, ker je druge vere, Franc Jožef pa je prišel.«

Izjava, da si kralj »ne upa med nas, ker je druge vere«, se je neposredno nanašala na pravoslavno vero kralja Aleksandra. Ko so prišli orožniki, se je Kolmaničeva odhoda branila in jih žalila z besedami »biriči«. Zaradi predhodnega zdravljenja v umobolnici Feldbach je bila oproščena (Vr VIII 783/26).

V začetku leta 1939 je v Pesserlovi gostilni na Ptuju prišlo do incidenta po pravoslavnem božičnem sprevodu. Na Ptuju rojeni fotograf Maks Kores je učitelju Mirku Majcnu dejal: »Tudi vi spadate k tem kumanatim Turkom. V par mesecih pride Hitler.« Izraz ‚kumanati Turki' je bil za pravoslavce žaljiv in povezan s prepričanjem, da so v tradicionalno katoliškem okolju tujci. Kores je bil znan po posmehu jugoslovanski vojski in naklonjenosti nacizmu. Obsojen je bil na osem mesecev zapora, a je pobegnil v Avstrijo (Kzp VII 384/39).

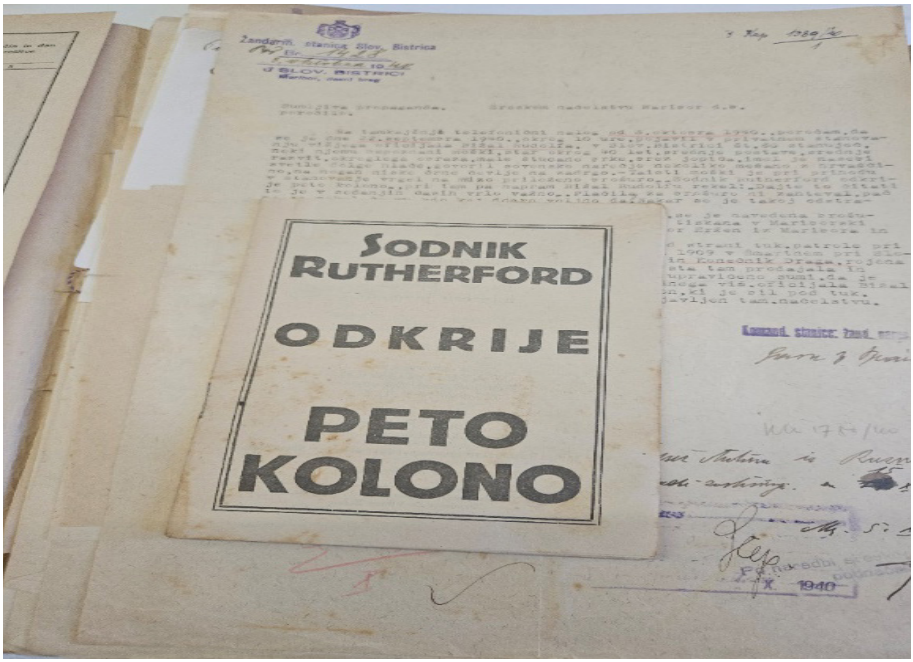
Primer Neže Kolmanič ponazarja, kako je bila pravoslavna vera kralja Aleksandra za del katoliškega prebivalstva na Štajerskem element tujosti in nezaupanja. Zato je kritika kralja zaradi njegove verske pripadnosti pomenila več kot osebni izpad – šlo je za izraz politične nelojalnosti, ki je v verski razliki našla dodatno oporo. V primeru Maksa Koresa pa je skoraj petnajst let pozneje ista tema dobila povsem drugačen okvir: žalitev pravoslavcev se prepleta s simpatijami do nacistične Nemčije in pričakovanjem njenega prihoda. Oba primera kažeta, da odnos do pravoslavja ni bil zgolj versko vprašanje, temveč predvsem politični simbol, skozi katerega so se artikulirali odpor do jugoslovanske države, srbske prisotnosti in same monarhije.

6.4 Jehovove priče in prepovedana verska literatura

Jehovove priče so se v času Kraljevine Jugoslavije večkrat znašle v navzkrižju z oblastmi. Njihova verska doktrina je zahtevala dosledno nevtralnost v političnih zadevah, zavračanje vojaške službe in prisege ter kritiko vseh oblik politične in cerkvene oblasti. Takšna stališča so bila v obdobju, ko sta vera in država delovali tesno povezano, razumljena kot neposredna grožnja državnemu redu.

V mariborskem sodnem okrožju sta leta 1940 izstopali dve zadevi, povezani s širjenjem jehovske literature, vezani na pisateljsko in govorniško dejavnost takratnega voditelja Jehovovih prič Josepha Franklina Rutherforda.

Prva in najbolj odmevna je bila zadeva Rudolfa Kaleja, ki je poleti 1940 prevedel angleško brošuro *Judge Rutherford Uncovers Fifth Column* (*Sodnik Rutherford raz-*



Slika 1: *Sporna brošura, spis Anton Papež, vir: PAM, foto JH.*

kriva peto kolono) v slovenščino. Delo, ki je izšlo istega leta v ZDA, je ostro kritiziralo Rimskokatoliško Cerkev in jo obtoževalo sodelovanja s fašističnimi režimi v Evropi, zlasti z Mussolinijevo Italijo in Hitlerjevo Nemčijo. Rutherford je v svoji bojeviti retoriki trdil, da Cerkev deluje kot »peta kolona« – skrita notranja sila, ki podpira totalitarne režime in iz ozadja spodkopava resnično svobodo vesti. Brošura je vojno zavračala kot nezdružljivo s krščanskimi načeli in pozivala k popolnemu nevpletanju v politične spore.

Kale je prevod opravil julija 1940 in pri Ljudski tiskarni v Mariboru naročil tisk 5000 izvodov, ki jih je nato razposlal somišljenikom po Dravski banovini. Sam je ob zaslišanju priznal, da gre za »realno kritiko RKC«, proti kateri se je po njegovem mnenju treba boriti. Pojasnil je, da izraz ‚peta kolona' pomeni tiste, ki iz ozadja in zahrbtno podpirajo sovražnika in tako državo vodijo v pogubo. Oblasti so brošuro označile za grožnjo nacionalni varnosti in enotnosti, saj je neposredno napadala Cerkev, ki je bila pomemben steber režima. Obenem so brošuro tudi uradno prepovedale (Kzp 1086/40).

V postopku je bil zaslišan tudi Viktor Eržen, novinar in predstavnik tiskarne, ki je zanikal kakršnokoli odgovornost, saj naj v tiskarni naročil ne bi vsebinsko preverjali, ampak so vso odgovornost nosili naročniki. Sodba je bila izdana 2. aprila 1941: Kale je bil obsojen na 600 dinarjev denarne kazni, pogojno za eno leto (Kzp 1086/40).

Druga zadeva iz istega leta je zadevala Antona Papeža, prodajalca jehovske literature iz Razvanja, ki je ponujal brošuro *Sodnik Rutherford*. Gre za delo, ki je v

milejši obliki prav tako izražalo Rutherfordove poglede na Cerkev in državo, poudarjalo bližino božjega kraljestva in nujnost odklanjanja sodelovanja v državnih institucijah, vključno z vojsko. Papeža je ovadil stanovalec, h kateremu je prišel brošuro prodajat na dom; ovadbo je podal na žandarski postaji v Slovenski Bistrici. Kljub ovadbi obtožnice niso vložili (Kzp 1389/40).

Obe zadevi sta pokazali, kako občutljivo je bilo vprašanje verske propagande v času, ko so oblasti vse publikacije z versko ali politično vsebino strogo nadzirale. Jehovove priče so s svojo neomajno kritiko državnih in cerkvenih institucij izzvale dvom v lojalnost državi, kar je v obdobju naraščajoče politične napetosti tik pred drugo svetovno vojno pogosto vodilo v sodne postopke, tudi če so se ti končali brez obsodbe.

Verske zadeve v mariborskem sodnem okrožju med obema vojnama razkrivajo, kako neločljivo so bile povezane vera, politika in nacionalna identiteta. Spor med katoličani in protestanti, nezaupanje do pravoslavcev, pregon Jehovovih prič in kaznovanje bogokletja kažejo na občutljivost oblasti za vsakršno poseganje v versko sfero, ki je bila hkrati del državne ideologije.

7. Sklep – duhovščina kot politično nelojalni element v očeh države

Raziskava sodnih spisov mariborskega okrožja potrjuje začetno tezo: duhovščina je bila v obdobju med obema vojnama v očeh oblasti pogosto razumljena kot politično nelojalna. Medtem ko so se drugi izobraženci pri političnih komentarjih večinoma znali zadržati in so pazili na zakonske omejitve svobode govora, so duhovniki katehizmu in moralnemu nauku pogosto dajali prednost pred državnim pravnim redom. Prav zato so se pred sodišči znašli pogosteje kot druge skupine intelektualcev.

Obravnavani primeri razkrivajo, da duhovniki niso bili obtoženi zaradi vere, temveč zaradi političnih konotacij svojih besed in dejanj. Kritike kralja in jugoslovanskega unitarizma so bile razumljene kot neposredna nelojalnost. Podpora dr. Antonu Korošču, še posebej v času, ko je imel napete odnose z režimom v Beogradu, je bila obravnavana kot politično sumljiva, četudi je izhajala iz njegove karizme kot duhovnika in simbola katoliškega tabora. Tudi simbolne geste v prid Orlom so bile obravnavane kot provokacije, čeprav so bile pogosto omejene na lokalne verske skupnosti. Obenem so bili duhovniki in njihovi sodelavci (organisti, kaplani, pevci) med glavnimi akterji sporov s Sokoli, ki so kot zaščitena državna organizacija predstavljali ideološko nasprotje katoliškemu taboru.

Verski spori – od bogokletja do žalitev pravoslavne vere in pregona Jehovovih prič – dodatno razkrivajo, da je bila verska pripadnost neločljivo povezana z državno lojalnostjo. Katoličtvo je v tem kontekstu nosilo dvojno breme: bilo je del narodne identitete Slovencev, toda obenem je bilo razumljeno kot ovira jugoslovanskemu unitarizmu.

Sodna praksa je bila ambivalentna. Včasih so bile izrečene stroge zaporne kazni, v drugih primerih mile denarne globe ali pogojne sodbe, ponekod pa so bili postopki celo ustavljeni. To kaže na pragmatično ravnanje medvojne oblasti, ki je želela duhovščino nadzorovati, a hkrati ni smela povzročiti odkritega konflikta z množičnim katoliškim prebivalstvom.

Cerkvene prižnice, župnijska dvorišča in celo gostilne so bili torej prostori, kjer so se v mariborskem okrožju oblikovali in širili izrazi politične nelojalnosti. Duhovščina je s svojo moralno avtoriteto in družbenim vplivom presegla okvir verske službe in postala eden ključnih dejavnikov političnega odpora – pogosto neorganiziranega, a za državo dovolj motečega, da je sprožila kazenski pregon. Čeprav oblasti duhovščine nikoli niso uspele povsem utišati, so sodni spisi jasen kazalec, da je bila ta družbena skupina v tridesetih letih razumljena kot politično problematičen in potencialno nevaren element.

Kratici

Kzp – Kazenski spis Okrožnega sodišča Maribor, zadeva Kzp.
Vr – Kazenski spis Okrožnega sodišča Maribor, zadeva Vr.

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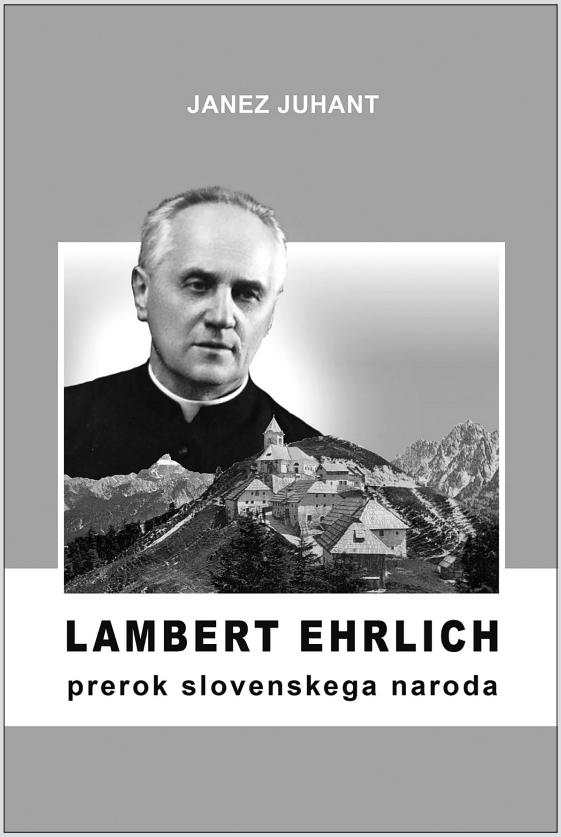

Janez Juhant

Lambert Ehrlich, prerok slovenskega naroda

Knjiga je celovit prikaz osebnosti Lamberta Ehrlicha (1878–1942) ter njegovega vsestransko bogatega delovanja v Cerkvi in družbi na Koroškem in v Sloveniji. Deloval je kot duhovnik, profesor, veroslovec, misijonar, socialni in narodno- politični delavec. Odlikujejo ga izjemna sposobnost, treznost, preudarnost in človeška bližina pri presoji problemov ter zmožnost vključevanja različnih ljudi pri iskanju najprimernejših rešitev za narod in Cerkev.

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The Presence of Dominican Missionaries in Vietnam from the 16th to the 18th Centuries

Prisotnost dominikanskih misijonarjev v Vietnamu med 16. in 18. stoletjem

Abstract: The article focuses on research to clarify the missionary activities of Dominican missionaries in Vietnam, from the first contact period (1550–1628) to the period of return to Vietnam and the gradual establishment of their position in the Diocese of Eastern Tonkin (1676–1796). During that process, the Dominican Order also achieved many remarkable results in training indigenous missionaries and conquering the faith of the Vietnamese, contributing with other missionary forces to introduce and develop Christianity in Vietnamese society during the 16th, 17th, and 18th centuries. The research on this issue was carried out based on exploiting original materials recorded by Dominican missionaries and other missionary forces and currently archived at the Congregation for the Sacred Congregation for the Propagation of the Faith. In addition, the academic achievements of Vietnamese and international scholars directly or indirectly related to the article's content also become one of two essential reference sources. The article's author combines two main research methods of Historical Science (historical and logical) with other research methods such as analysis, synthesis, statistics, comparison, etc. The article will significantly contribute to the study of the history of the introduction and development of Christianity in Vietnam, as well as the role of the Dominican Order in this process during the 16th, 17th, and 18th centuries.

Keywords: Dominican Order, Vietnam, Eastern Tonkin, missionary, diocese

Povzetek: Prispevek se posveča raziskavi, ki razjasnjuje misijonsko delovanje dominikanskih misijonarjev v Vietnamu – od obdobja prvih stikov (1550–1628) do obdobja vrnitve v Vietnam in postopnega utrjevanja njihovega položaja v škofiji Vzhodni Tonkin (1676–1796). V tem procesu je dominikanski red dosegel tudi številne izjemne rezultate pri usposabljanju domačih misijonarjev in spreobračanju Vietnamcev, s čimer je skupaj z drugimi misijonarskimi močmi prispeval k uvedbi in razvoju krščanstva v vietnamski družbi od 16. do 18. stoletja. Raziskava je bila izvedena na podlagi izvirnih besedil, ki so jih napisali dominikanski in drugi misijonarji in jih trenutno hrani Kongregacija za širjenje vere. Še

eden od bistvenih referenčnih virov so akademski dosežki vietnamskih in mednarodnih znanstvenikov, ki so neposredno ali posredno povezani z vsebino prispevka. Avtor dve glavni raziskovalni metodi zgodovinske znanosti (zgodovinsko in logično) povezuje z drugimi raziskovalnimi metodami, kot so analiza, sinteza, statistika, primerjava itd. Prispevek bo pomembno prispeval k študiju zgodovine uvajanja in razvoja krščanstva v Vietnamu ter vloge dominikanskega reda v tem procesu v 16., 17. in 18. stoletju.

Ključne besede: dominikanski red, Vietnam, Vzhodni Tonkin, misijonar, škofija

1. Introduction

Since the 16th century, the maritime route through the Cape of Good Hope, connecting Europe with the Far East, has been established.[1] This was also the time that marked the beginning of the breakout in commercial and missionary activities of Western countries in this region. Among them, Portugal and Spain are the two pioneer countries. For the Portuguese, along with the process of establishing commercial firms over a large geographical area from South Asia to Northeast Asia, to expand and strengthen their influence through conquering the faith of the people of Asian countries, they successively established dioceses in Goa (1534) (Neill 2004, 117; Portugal Conselho Ultramarino 1867, 455), Malacca (1558) (Portugal Conselho Ultramarino 1867, 455; Associação Maritima e Colonial 1843, 314) and Macao (1576) (De Moidrey 1914, 8). On the Spanish side, they approached the Philippines by force to compete with Portugal's commercial and missionary privileges in the Far East and established the Diocese of Manila in 1579 (Villarroel 2005, 78; Teixeira 2004, 27). Thus, by the 16th century, missionary centers had emerged in various locations in the Far East. This was where missionaries from different religious orders (Dominican Order, Franciscan Order, The Society of Jesus) frequented and operated under the patronage of two countries, Portugal and Spain.

Meanwhile, in Vietnam, the situation of dismemberment and division resulting from the power struggle between the Mac family in Thang Long (Northern Dynasty) and the Le family in Thanh Hoa (Southern Dynasty) in the 16th century (Chapuis 1995, 113–119; Taylor 2013, 224–257), as well as the Trinh-Nguyen conflict during the 17th and 18th centuries (Anh Thuan 2022, 22–37), led these monarchies to repeatedly call for or clearly express their desire to implication Western missionaries to come and carry on missionary work (Du Caillaud 1915, 17–18; 20–21, 30; 36–38; Bernard 1935, 397–399). Because they believed that the presence of missionaries in the area they governed was the most reliable guarantee

[1] This research was written as a result of the ministerial-level research project: "Quá trình du nhập văn hoá phương Tây vào Việt Nam và Nhật Bản thế kỉ XVI–XVIII [The process of introducing Western culture into Vietnam and Japan in the 16th–18th centuries]" (research project number: B2024.DNA.15), carried out from funding sources issued by Bộ Giáo dục và Đào tạo Việt Nam [The Ministry of Education and Training of Vietnam].

for Western merchant ships to visit regularly (Hồng 1959, 22) and trade goods, especially weapons, thereby helping them to strengthen their economic and military power in confrontations with political opponents. This created an extremely favorable premise for missionaries from different religious orders of Christianity, including the Dominican order, to be present in Vietnam and spread Christianity among the Vietnamese in the 16th, 17th, and 18th centuries.

2. Dominican Order and Vietnam: Contacts from the Late 16th Century to the Early 17th Century

Since the 16th century, along with the process of promoting trade and the expansion of Portugal and Spain in the Far East, dioceses receiving patronage from these two countries were established in Goa (1534), Malacca (1558), Macao (1576), and Manila (1579). That was the organizational premise for religious orders of Christianity, in general, and the Dominican order, in particular, preaching the Gospel in many countries in this region. Among them, Vietnam was no exception.

No.	Time	Quantity	Name of the Missionary	Patronage Country	Area
1	1550	01	Gaspar da Cruz	Portugal	Southern Vietnam
2	1586	02	Luis Fonséca		Central Vietnam
			Grégoire de la Motte		
3	1588	02	Juan Maldonat	Spain	Southern Vietnam
			Pedro de la Bastida		
4	1596	03	Alonso Jimenéz		Central Vietnam
			Diego Aduarte		
			Juan Bautista Deza		
5	1599	02	Juan Maldonado		Southern Vietnam
			Pedro de Bastida		
6	1603	03	Inigo de Santa Maria		Southern Vietnam
			Jerónimo de Belén		
			Alonso Collar		
7	1628	05	Bautista de Morales and four other missionaries		Southern Vietnam

Table 1: *Missionaries of the Dominican Order came to Vietnam during the period 1550–1628. (Phát Huồn 1965, 44; Louvet 1885, 226; Hồng 1959, 39; Gispert 1928, 13; Bá Cần 2008, 27; Du Caillaud 1915, 169–170; 176; 191; 198–199; Aduarte 1963, 189–195; 211–219; 726–728; 732–737; Loureiro 2005, 193–222; Đức Sinh 1975, 90–98)*

From the statistical table, it can be seen that, during the 78 years (1550-–728), missionaries of the Dominican Order went via different lands in the territory of present-day Vietnam seven times. Like that, on average, they come once every 11 years. However, it is worth mentioning that this does not happen regularly, frequently, or continuously. Even at times, it was interrupted for quite a long time. For example, if we count from the time Gaspar da Cruz[2] – the first missionary of the

[2] Gaspar da Cruz was born around 1520 and was a Portuguese missionary of the Dominican Order. In 1548, he set out for India to preach. In 1550, he set foot in the southern region of present-day Vietnam

Dominican Order, arrived in Can Cao (Ha Tien, in present-day Southern Vietnam) in 1550, it was 36 years later (1586) that the following two missionaries of this religious order, Luis Fonséca, and Grégoire de la Motte, were present in the Central region of Vietnam. The above situation continued in 1604–1627, when, for 23 years, no historical documents recorded the presence of missionaries of the Dominican Order in Vietnam. Meanwhile, with 18 missionaries of the Dominican Order who set foot in Vietnam during the period 1550–1628, this is not a very impressive number. 1628 is recorded as the year with the most missionaries of the Dominican Order coming to Vietnam, but this number was at most five people. The other times it ranged from two (1586, 1588, 1599) to three people (1596, 1603). There was even a time when only one missionary came to preach (1550).

Regarding the patronage country, in the period 1550–1586, three missionaries of the Dominican Order came to Vietnam, Gaspar da Cruz, Luis Fonséca, and Grégoire de la Motte, all originated from and were under the management of the Malacca diocese – a missionary center founded and sponsored by Portugal. However, from 1588 onwards, in the context of the declining position of the Portuguese in Southeast Asia (Đức Sinh 1975, 61), Portuguese Dominican missionaries were gradually replaced by Spanish Dominican missionaries sent by the Diocese of Manila.

Regarding the area of operation, at the end of the 16th century, Northern Vietnam was the area where missionaries of the Franciscan Order frequently visited to preach the Gospel (Du Caillaud 1915, 55; Hồng 1959, 33; Gispert 1928, 14–15; Bonifacy 1930, 8). On the contrary, the missionaries of the Dominican Order mainly operate in the Central and Southern regions of Vietnam nowadays. Specifically, during the period 1550–1628, missionaries of the Dominican Order passed through the Southern region five times and went to the Central region twice. If the Southern region of Vietnam nowadays has many opportunities to welcome missionaries of the Dominican Order, it was because the monarchical governments in Chenla [真臘: Cambodia] from the late 16th century to the early 17th century continuously contacted the Spanish and called on missionaries from the Philippines to come to this country to operate. They wanted to enlist the help of the Spanish to resolve internal conflicts and contradictions in this country, consolidate power, and fight against foreign aggression (Đức Sinh 1975, 90; 94). At that time, the fastest and most convenient way for missionaries to travel from Manila to Cambodia was to follow merchant ships of Spanish merchants or diplomatic corps of this country up the Cuu Long River (the name of the Mekong River flowing through the southern region of Vietnam). That has made the footsteps of the missionaries of this religious order many times leave their mark many times on the Southern region of Vietnam nowadays. Meanwhile, preaching the Gospel in Central Vietnam, an area that began to have a large Vietnamese population at the end of the 16th century, was also within the goals of missionaries of the Dominican Order. That explained their presence in this land in 1586 and 1596.

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before arriving at Lampaccao – a small island in Guangzhou [廣州] Bay in 1556. He probably returned to Europe in 1565 and died in Setúbal in 1570 of the epidemic diseases (Russell Wood 1998, 92; Borao 2009, 2–3; Bá Cần 2008, 26).

So, how did the activities of Dominican missionaries in different areas of Vietnam occur from the late 16th century to the early 17th century? During this period, the missionaries of the Dominican Order did not achieve any success in preaching the Gospel to the Vietnamese in present-day Southern Vietnam. Although, since the first half of the 17th century, Vietnamese have settled and lived in this area (Quang Ngọc 2017, 77–96), at that time, the goal of Dominican missionaries was to operate in the territory of present-day Cambodia at the call of the monarchical governments of this country. Therefore, they only passed through the southern region of Vietnam without stopping to preach there.

Meanwhile, during the contacts to evangelize the Vietnamese in Central Vietnam at the end of the 16th century, there were times when the Dominican missionaries established good relations with the Vietnamese authorities[3]. However, in the end, the work of "cultivating" the "seeds" of Christianity in Central Vietnam by this religious order missionaries still did not achieve positive results. This was because, at that time, the missionary activities of the Dominican missionaries were not well organized. The number of missionaries of this religious order sent to Vietnam by the dioceses of Goa, Malacca, or Manila during 1550–1628 was not too large. Missionary activity was also not maintained continuously. Besides, at that time, the Dominican missionaries did not put the goal of conquering the faith of the Vietnamese first. Still, they only focused on spreading the Gospel to the people of Cambodia. In addition, Christtopho Borri – a missionary of the Society of Jesus who operated in Vietnam from 1618 to 1621, also pointed to another reason. In the work Relation de la nouvelle mission des pères de la compagnie de Jésus au royaume de la Cochin-Chine, he said that from the end of the 16th century to the beginning of the 17th century, Dominican missionaries from the dioceses of Goa, Malaca or Manila came to Vietnam on the merchant ships or the ships of diplomatic delegations of Portuguese and Spanish as chaplains. Their primary purpose is to take care of the spiritual life (celebrating mass, conferring sacraments, etc.) for merchants or officers and soldiers of these two countries during their stay in Vietnam, usually about three to four months. Because the Dominican Order's chaplains had no other responsibilities than serving the Portuguese or Spanish, they were not very interested in evangelizing the natives. Therefore, they also have not yet realized the urgency and importance of learning and understanding the language and culture of the natives to bring the light of the Gospel to the Vietnamese. The solution of using indigenous interpreters to preach the Gospel to the Vietnamese was once used by some Dominican missionaries, but it was also ineffective (Borri 1931, 337). Even so, the presence and initial contacts between the missionaries of this religious order and the Vietnamese from the second

[3] On June 24, 1596, three missionaries, Alonso Jimenéz, Diego Aduarte, and Juan Bautista Deza, arrived at the Cachan estuary (Danang city). After more than two months in Cachan, on August 28 of the same year, one of these three missionaries, Diego Aduarte, arrived at the capital city of Sinoa (present-day Hue city) to establish relations with the Nguyen Lord government. Here, he was warmly welcomed by the viceroy - son of Lord Nguyen Hoang. The viceroy of Cochichina gave Diego Aduarte many gifts, warmly invited him to stay in the capital, Sinoa, and promised to build him a chapel (Du Caillaud 1915, 169–170; 176; 191; 198–199).

half of the 16th century to the first half of the 17th century laid a solid foundation for the development of the evangelizing activity of the Dominican Order in Vietnam in the later period.

3. The Dominican Order Returned to Vietnam and Developed a Missionary Career from 1676 to the End of the 18th Century

After some contacts but did not achieve ideal missionary results in 1550-1628, historical materials did not record any further presence of Dominican missionaries in Vietnam until before 1676. Meanwhile, in the first half of the 17th century, with the thorough and creative application of the missionary approach of "adaptation to indigenous culture" (Anh Thuan and Van Sang 2020, 412), missionaries of the Society of Jesus achieved excellent results in spreading the Gospel in Cochinchina and Tonkin (Vietnam). On that basis, realizing the need to build a tight organizational structure to manage missionary work in these areas effectively, Alexandre de Rhodes – a French missionary of the Society of Jesus – mobilized the Holy See to establish dioceses in Vietnam. On September 9, 1659, Pope Alexander VII issued the Super Cathedram decree, establishing the dioceses of Tonkin and Cochinchina, and appointed François Pallu[4] and Lambert de la Motte[5] – two missionaries of the Society of Foreign Missions of Paris, as bishops (Hoster, Kuhlmann and Wesolowski 2017, 255; Benedetto 2008, 494). Thus, although the missionaries of the Society of Jesus were the force that laid the foundation for the introduction of Christianity to Vietnam during the first half of the 17th century, from 1659 onwards, the management of missionary work in this country was assigned to the missionaries of the Society of Foreign Missions of Paris. After that, the rapid development of Christianity in Tonkin (Launay 1927, 93–94; 143–144; 147–149) continued to pose urgent requirements for the organization and management of this diocese. Faced with that situation, in 1679, the Holy See approved the division of the Tonkin diocese into two new dioceses: Eastern Tonkin (Diocese of Hai Phong, Diocese of Bui Chu, Diocese of Thai Binh, Diocese of Bac Ninh, and Diocese of Lang Son nowadays) and Western Tonkin (Archdiocese of Ha Noi, Diocese

[4] François Pallu (1626–1684) was a French missionary from the Society of Foreign Missions of Paris who greatly influenced Christianity in China and Vietnam during the second half of the 17th century. In 1658, he was appointed by the Holy See as Vicar apostolic of Tonkin, managing missionary work in Tonkin (Vietnam), Laos, and five provinces in the Southwest of China. In 1680, when the Diocese of Fujian [福建] (the Diocese of Fuzhou [福州] nowadays) was established, he was appointed by the Holy See as Apostolic Administrator, managing the missionary work of nine provinces and islands in Southern China. On October 29, 1684, he died in Fujian [福建], China (Lach and Van Kley 1993, 231; 262; De Moidrey 1914, 71–72; Baudiment 2006, 532).

[5] Lambert de la Motte was a missionary of the Society of Foreign Missions of Paris. He was born on January 16, 1624 in Lisieux, France. In 1655, he was ordained a priest. On July 29, 1658, he was appointed Titular Bishop of Berytus and Vicar Apostolic of Cochinchina. During his management of missionary activities in Cochinchina, he only visited this missionary area twice (the first time from September 1671 to March 1672 and the second time from July 1675 to May 1676), and most of the remaining time, he worked in Ayutthaya and died here in 1679 (Gauchat 1935, 114).

Time	Quantity	Name of the missionary	Position	Nationality	Missionary organization	Missionary area
1676	02	Juan de Santa Cruz	Bishop (1716–1721)	Spanish	Diocese of Manila	Eastern Tonkin
		Juan de Arjona	Priest			
1677	01	Dionisio Morales				
1681	01	Raymundo Lezoli	Bishop (1698–1706)	Italian	The Sacred Congregation for the Propagation of the Faith	
1693	02	Antonio Beriain	Priest	Spanish	Diocese of Manila	
		Tomas Gorrichategu				
1696	02	Pedro de Santa Teresa (Bustamanta)				
		Francisco Lopez				
1701	02	Tomas Sestri	Coadjutor Bishop (1718), Bishop (1721–1737)	Italian	The Sacred Congregation for the Propagation of the Faith	
		Bartolome Subuquillo	Priest	Spanish	Diocese of Manila	
1715	02	Eleuterio Guelda				
		Juan Ventura Diaz				
1718	02	José Valerio				
		Alonso Gomez de Santo Tomas				
1719	02	Juan Verea				
		Juan Pozuelo				
1732	02	Pedro Ponsgrau				
		Mateo Alonso Liciania				
1735	02	Francisco Gil de Federich				
		Luis Espinosa				
1738	01	Juan Maldonado				
1751	02	Santiago Hernandez	Bishop (1757-1777)			
		Emmanuel Martin	Priest			
1755	02	Manuel Esteban				
		Beneto Llobressols				
1759	01	Domingo Pujol				
1763	05	Vicente Ausina				
		Manuel Obélar	Bishop (1779–1789)			
		José Benito	Priest			
		Pedro Diez Agnado				
		Feliciano Alonso	Bishop (1790–1799)			
1770	04	José Lavilla	Priest			
		Jacinto Castaneda				
		Domingo de San Vicente				
		Francisco Costes				
1790	04	Ignacio Delgado				
		Domingo Henares				
		Joaquin Gatillepa				
		Mateo Vidal				
1796	03	Juan Barranco				
		Jose Amandi				
		Vicente Bombin				

Table 2: *The missionaries of the Dominican Order operated in Vietnam from 1676 to 1796. (Gispert 1928, 80–81; 84; 126; 134; 734–735; Launay 1927, 204; 213–214; Marillier 1995a, 109; 112; 115–119; Marillier 1995b, 159; 165; 169)*

of Hung Hoa, Diocese of Phat Diem, Diocese of Thanh Hoa, and Diocese of Vinh nowadays) (Launay 1927, 221–222), under the management of two missionaries, François Deydier[6] and Jacques de Bourges[7], both of the Society of Foreign Missions of Paris. At that time, facing a severe shortage of missionary human resources as well as fierce disputes with Portuguese Jesuit missionaries, these two bishops thought of inviting missionaries from other religious orders, including the Dominican Order, to Vietnam in general and Tonkin in particular, to strengthen forces and promote missionary work in this area. That explains the return of Dominican missionaries to Vietnam at the end of the 17th century.

From the above statistical table, it can be known that, during the 120 years (1676–1796), Dominican missionaries came to Vietnam 19 times to preach the Gospel. Like that, on average, they come once every six years. This figure is a significant decrease compared to 1550-1628 (an average of more than 11 years). Although the number of times Dominican missionaries came to Vietnam to evangelize from 1676 to 1796 (19 times) was 2.7 times more than the period of 1550–1628 (seven times), that does not mean that this work was carried out more regularly and continuously than before. If we count from the time the Dominican missionaries returned to Vietnam in 1676 until the end of the 18th century, the interruption in sending missionaries of this religious order to the Eastern Tonkin region to spread the Gospel, with a period of more than ten years, appeared three times (1720–1731: 12 years, 1739–1750: 12 years, 1771–1789: 19 years). In the materials of the Dominican missionaries, there is no direct mention of the cause of this situation. However, from the records of the ups and downs in the missionary situation in Vietnam in the above periods, it can be known that the drastic implementation of the policy of banning Christianity by the indigenous government at that time (Gispert 1928, 172; 179; 192–195; 197–200; 209–229; 260–265; 266–285; Montézon et al. 1858, 293–312; 313–318; 403–404; Nouvelles Lettres Édifiantes des missions de la Chine et des Indes Orientales 1821, 141; 251–252; 272–273; 317–320; 337–338; Launay 1925, 240; Nouvelles Lettres Édifiantes des missions de la Chine et des Indes Orientales 1823b, 1–66) became one of the major obstacles preventing Dominican missionaries from penetrating the interior of Vietnam. Furthermore, in the 18th century, Dominican missionaries under the

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[6] François Deydier was a missionary of the Society of Foreign Missions of Paris. He was born on September 28, 1634 in Toulon, France. In November 1660, he was ordained a priest. In August 1662, he went to Siam with Bishop Lambert de la Motte. Here, he began to learn Vietnamese, and on June 22, 1666, he left Siam to work in Tonkin. On November 25, 1678, he was appointed by the Holy See as Titular Bishop of Ascalon and Vicar Apostolic of Eastern Tonkin. He held this position until his death on July 1, 1693 (Bá Cẩn 2008, 373-374; Ritzler and Sefrin 1952, 100).

[7] Jacques de Bourges was a priest of the Society of Foreign Missions of Paris. He was born in 1630 in Paris. In 1662, he went to Siam with Bishop Lambert de la Motte. However, in 1663, he returned to Europe. In 1669, he returned to Siam with three missionaries (initially, there were six missionaries; however, during the journey from Europe to Siam, three died on the way). Also, this year, he accompanied the inspection delegation of the Tonkin diocese led by Bishop Lambert de la Motte and began his missionary work in this area. On November 25, 1679, he was appointed Titular Bishop of Auzia and Vicar Apostolic of Western Tonkin. He took on the task of managing missionary work in the Diocese of Western Tonkin until 1712, when he was expelled. He returned to Siam and died there on August 9, 1714 (Launay 1927, 80-83; Ritzler and Sefrin 1952, 106).

administration of the Diocese of Manila established and expanded missionary activities in many different countries and territories in the Far East, including Vietnam. Therefore, at specific times, a shortage of missionary human resources to send to these places was inevitable.

Regarding the missionary area, from 1676 to 1697, when came to Tonkin to spread the Gospel at the invitation of the bishops of the Society of Foreign Missions of Paris, who governed the dioceses of Eastern Tonkin and Western Tonkin at that time, the Dominican missionaries mainly operated in locations belonging to the diocese of Eastern Tonkin, designated by these bishops (Gispert 1928, 84). In 1698, with the Holy See's decision to appoint Dominican missionary Raymundo Lezoli as Bishop of the Diocese of Eastern Tonkin (Bá Cần 2008, 442; Gispert 1928, 134), this diocese officially came under the administration of the Dominican Order. Therefore, from 1698 onwards, all missionaries of this religious order came here to carry out pastoral work, which is also completely understandable.

Regarding the number of missionaries, nationality, and patronage organizations, 42 Dominican missionaries were operating in Vietnam during the period 1676–1796. Among them, 40 Spanish priests were sent by the Diocese of Manila, accounting for an overwhelming proportion (95.24%) compared to two Italian priests under the Sacred Congregation for the Propagation of the Faith (4.76%). That shows the superiority and dominance of the Spanish Dominican Order over missionary work in Eastern Tonkin (Vietnam) during this period. Even so, until 1757 – the time when the Spanish Dominican missionary Santiago Hernandez[8] was appointed by the Holy See as bishop of the Diocese of Eastern Tonkin, opening the period of the Spanish Dominicans' monopoly on missionary work in this area, the Holy See had twice assigned the management of missionary work in this diocese to the Italian Dominican missionary Raymundo Lezoli[9] in the period 1698–1706 and Tomas Sestri[10] from 1721 to 1737. During the period 1737–1757, the position of bishop of the Diocese of Eastern Tonkin even slipped out of the hands of Dominican missionaries, whether of Italian or Spanish nationality and was given by the Holy See to missionary Hilario a Jesu Costa[11] of the Order of Saint Augusti-

[8] Santiago Hernandez was a Spanish Dominican missionary, born in 1723 in Melgar del Arriba. In 1757, he was appointed by the Holy See as Titular Bishop of Hierocaesarea and Vicar Apostolic of Eastern Tonkin. He served as the administrator of this diocese for 21 years and died on February 6, 1777 (Ritzler and Sefrin 1958, 235; 455; Gispert 1928, 285–286).

[9] Raimondo Lezzoli was an Italian Dominican missionary born in 1655 in Milan. In 1698, he was appointed by the Holy See as Titular Bishop of Olena and Vicar Apostolic of Eastern Tonkin. He took on the task of governing this diocese for 11 years and died in Luc Thuy (Nam Dinh province) in the diocese of Eastern Tonkin on January 18, 1706 (Ritzler and Sefrin 1952, 295; Gispert 1928, 137).

[10] Tomas Sestri was an Italian Dominican missionary born in 1664 in Sestri Ponente, Italy. In 1692, he was ordained a priest. In 1716, he was appointed by the Holy See as Titular Bishop of Nyssa and Coadjutor Vicar Apostolic of Eastern Tonkin. In 1721, he officially became the Vicar Apostolic of Eastern Tonkin. He took on governing this diocese for 17 years and died in Luc Thuy (Nam Dinh province) in the diocese of Eastern Tonkin in August 1737 (Ritzler and Sefrin 1952, 295; Gispert 1928, 200).

[11] Hilario a Jesu Costa was an Italian Order of Saint Augustine missionary, born in 1696 in Pessinetto. The Holy See appointed him as Titular Bishop of Corycus and Coadjutor Vicar Apostolic of Eastern Tonkin in 1735. In 1737, he officially became Vicar Apostolic of Eastern Tonkin. He took on governing this diocese for 18 years and died in the diocese of Eastern Tonkin on March 31, 1754 (Ritzler and Sefrin 1958, 184; 455).

ne. So, what is the reason for explaining this situation? In fact, from the end of the 17th century to the beginning of the 18th century, the Holy See realized the problem of a "national mission" (Launay 1923, 522–523) taking place in the Far East in general and Vietnam in particular. Accordingly, "that meant that each religious order received a great deal of support in many ways, especially financial matters from a Western country (either Portugal, France, or Spain), and in return, they had to carry out missionary work under the direction and for the interests of that country" (Anh Thuan 2021a, 376; Anh Thuan 2021b, 65). Therefore, to prevent the French intention to monopolize missionary work in Tonkin (Vietnam)[12], the Holy See appointed a Dominican missionary as the Diocese of Eastern Tonkin bishop to replace the French missionaries of the Society of Foreign Missions of Paris. Even so, the Holy See still feared that the intention to monopolize the missionary work in Eastern Tonkin (Vietnam) from the French would shift to the Spanish shortly. So, although the Spanish Dominican missionaries of the Diocese of Manila, most notably Juan de Santa Cruz[13], had been present in Eastern Tonkin since 1676. However, when appointing the bishop of this diocese in 1698, the Holy See chose an Italian Dominican priest (Raymundo Lezoli). The Holy See's hesitation in entrusting the Diocese of Eastern Tonkin to Spanish Dominican missionaries continued after that, leading to the appointment of another Italian Dominican missionary (Tomas Sestri) as bishop of this mission area from 1721 to 1737. In particular, from 1737 to 1757, because it did not want to give exclusive leadership of the missionary work to Dominican missionaries of Italian or Spanish nationality, the Holy See decided to appoint the Italian priest Hilario Costa of the Order of Saint Augustine as bishop of the Diocese of Eastern Tonkin. The appointment of Italian bishops of the Dominican Order or the Order of Saint Augustine to govern the Eastern Tonkin missionary area – where Spanish Dominican priests had devoted much effort to exploring and building - caused the conflict between them and the Italian bishops to become more intense, especially when Bishop Hilario Costa managed the missionary work in this diocese (1737–1754) (Gispert 1928, 189–191; 200; *Marillier* 1995a, 106; 108; 126–127; 166; Bá Cần 2008, 454; 462–465, 468–473). The above situation only really ended in 1757, when the Holy See decided to hand over Eastern Tonkin to the Spanish Dominican missionaries for long-term management by appointing Spanish priest Santiago Hernandez of this religious order as bishop, and at the same time ordered the priests of the Order of Saint Augustine to leave this missionary area (Gispert 1928, 251–255). From then on, the Spanish Dominican missionaries completely controlled the missionary work in Eastern Tonkin.

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[12] The French have carried out a canvass to have a missionary of the Society of Foreign Missions of Paris continue to be appointed as bishop of the Eastern Tonkin diocese or to request that Eastern Tonkin and Western Tonkin be placed under the management of a single missionary of this missionary organization (Bá Cần 2008, 442).

[13] Juan de Santa Cruz was a Spanish Dominican missionary born in San Martín de Valvení in 1645. In 1666, he joined the Dominican Order. In 1716, he was appointed Titular Bishop of Hemeria and Vicar Apostolic of Eastern Tonkin. He took on the task of governing this diocese for six years and died in Trung Linh (Nam Dinh province) of the Diocese of Eastern Tonkin on August 14, 1721 (Ritzler and Sefrin 1952, 221; Gispert 1928, 163; 165; 171).

Like the missionaries of the Society of Foreign Missions of Paris, when they returned to Tonkin (Vietnam) to spread the Gospel in the second half of the 17th century, Dominican missionaries recognized the importance of indigenous missionary forces. They were the ones who would take care of the spiritual and religious life of the parishioners and carry out other pastoral work during the absence of Dominican missionaries in the Eastern Tonkin region. Dominican missionaries also clearly saw the advantages of the indigenous missionary force, as they not only did not encounter language barriers but also had a deep understanding of the indigenous people's culture, customs, and habits (Anh Thuan 2021c, 116). Therefore, while preaching the Gospel in Eastern Tonkin, Dominican missionaries also paid much attention to the training of Vietnamese priests.

Year of Ordination to the Priesthood	Quantity	Name of the Vietnamese Priest	Place of Ordination to the Priesthood
1739	02	Pie Tháp (Thạp)	Diocese of Eastern Tonkin
		Dominique Minh	
1742	02	Michel Huynh	
		Joseph Đĩnh	
1745	01	Joseph Chiêu	
1746	01	Nicolas Diển	
1748	02	Anrê Khôi	
		Paulus Huyên	Diocese of Manila
1750	02	Luca Hoa	Diocese of Eastern Tonkin
		Inhatio Nhuận	
1754	02	Vicente Liêm	Diocese of Manila
		Juan Huy de los Santos	
1757	03	Tomas Chấn	Diocese of Macao
		Augustin Y	
		Miguel de Santo Domingo	
1758	01	Tomas Hoàng (Huân)	
1759	04	Domingo Doá	
		P. Fr. Domingo Điêng	
		Domingo Lai	
		Pablo Lương (Thụ)	
1765	03	Juan Khoan	Diocese of Eastern Tonkin
		Nicolas Liên	
		Pablo Tri	
1777	01	Tomas Chén	
1778	03	José Vinh	
		Micae Thiên	
		Pedro Thuyên	
1784	03	José Trạch	
		Nicolás Uyển	
		Pedro Phương	
1792	03	Tomas Sen	
		Domingo Lương de San Pedro	
		Domingo Trinh	
1793	01	Luis Nhường	
1794	01	Cosma Ất	
1795	01	Domingo Thanh	
1796	01	Domingo Diêng	

Table 3: *Vietnamese priests of the Dominican Order operated in the diocese of Eastern Tonkin during the period 1739–1796. (Marillier 1995a, 65–67; 1995b, 108; 115; 123; 127; 142; 165; 168; Gispert 1928, 740–741; Bá Cần 2008, 458; 475)*

From comparing and collating many different sources of materials, it can be seen that the training activities of indigenous priests of the Society of Jesus (Marillier 1995a, 55; 57–58) or the Society of Foreign Missions of Paris (Anh Thuan 2021c, 120–122) in different missionary areas in Vietnam were carried out from the end of the 17th century. On the contrary, for Dominican priests in Eastern Tonkin, this work officially started in the first half of the 18th century (1739). However, this does not mean that the results of training indigenous priests by Dominican missionaries are utterly inferior to those of other missionary forces. From 1719 to 1795, Dominican missionaries conducted 19 times priestly ordinations for 37 Vietnamese. Thus, the results achieved by the Dominican missionaries in Eastern Tonkin in training indigenous missionaries were nearly twice as many as those of the Society of Foreign Missions of Paris in Cochinchina (19 people in the period 1668–1796) (Anh Thuan 2021c, 120–121), 1.4 times as many as the number of indigenous priests trained by the Society of Jesus in the period 1684–1766 (26 people) (Montézon et al. 1858, 303–304; *Marillier* 1995a, 46–49; 51; 57–58; 60–61; 1995b, 37; 115; 131; 133; 136; 139; 142; 151; 166; Nouvelles Lettres Édifiantes des Missions de la Chine et des Indes Orientales 1821, 160), and only less than the results of training indigenous priests of the Society of Foreign Missions of Paris in Tonkin (95 people in the period 1668–1766) (Anh Thuan 2021c, 121–124). In particular, with 19 times priestly ordinations for indigenous catechists over 56 years (1739–1795) (an average of about three years/time), it can be seen that this work was carried out quite regularly by Dominican missionaries in Eastern Tonkin and rarely interrupted for an extended period. There are many reasons for the positive results above. Firstly, after taking over the Diocese of Eastern Tonkin, the Dominican missionaries paid great attention to building and maintaining the activities of seminaries in several locations in this missionary area, such as Kien Lao, Trung Linh, Luc Thuy, etc. (Hữu Trọng 1959, 249–251). These seminaries provided a rich source of seminarians. On that basis, Dominican missionaries will select outstanding people to be ordained priests. Secondly, the ordination of priests for natives could only be done by bishops. During the period 1739-1795, the almost continuous presence of the bishops of the Diocese of Eastern Tonkin in this missionary area (Hilario Costa: 1737–1757, Santiago Hernandez: 1763–1777, Manuel Obellar[14]: 1779-1789; Feliciano Alonso[15]: 1790–1799) despite the difficulties and dangers brought about by the baning Christianity policy of the Vietnamese monarchy authorities (Gispert 1928, 172; 179; 192–195; 197–200; 209–229; 260–265; 266–285; Montézon et al. 1858, 293–312; 313–318; 403–404; *Nouvelles Lettres Édifiantes des Missions de la Chine et des Indes Orientales* 1821, 141; 251–252;

[14] Manuel Obellar was a Spanish Dominican missionary born in Donado in 1734. In 1758, he joined the Dominican Order. In 1778, he was appointed Titular Bishop of Ruspae and Vicar Apostolic of Eastern Tonkin. He took on governing this diocese for 12 years and died in the Diocese of Eastern Tonkin on September 7, 1789 (Ritzler and Sefrin 1958, 361; 455).

[15] Feliciano Alonso was a Spanish Dominican missionary born in Soto de Valdeón in 1732. In 1790, he was appointed Titular Bishop of Fesseë and Vicar Apostolic of Eastern Tonkin. He took on governing this diocese for 10 years and died in the Diocese of Eastern Tonkin on February 2, 1789 (Ritzler and Sefrin 1958, 215; 455).

272–273; 317–320; 337–338; Launay 1925, 240; *Nouvelles Lettres Édifiantes des Missions de la Chine et des Indes Orientales* 1823a, 262–282; *Nouvelles Lettres Édifiantes des Missions de la Chine et des Indes Orientales* 1823b, 1–66), created proactivity in training the indigenous missionary forces of the Dominican missionaries. This explains why the number of Vietnamese priests ordained in the Diocese of Eastern Tonkin was much higher (26/37: 70.3%) than the number of indigenous seminarians and catechists ordained in Manila (3/37: 8.1%) or Macao (8/37: 21.6%). In the 18th century, the Dominican missionaries in Eastern Tonkin sent Vietnamese seminarians and catechists abroad to receive priestly ordination as a temporary measure. It was only carried out by the missionaries of this religious order in the period 1754–1763, when priest Santiago Hernandez, although ordained bishop of the Diocese of Eastern Tonkin by the Holy See in 1757, was not able to come to take over the management of this missionary area until 1763 (Bá Cần 2008, 474). Even so, this temporary measure also contributed to strengthening the Vietnamese priest force of the Dominican Order in Eastern Tonkin at that time.

Regarding the results of missionary work from 1676 until the end of the 18th century, despite facing many difficulties and challenges from the policy of banning Christianity by the Vietnamese monarchy, as well as internal conflicts in the Dominican Order between Italian Bishops and Spanish missionaries, in general, the evangelization work of this religious order in the Eastern Tonkin region still achieved remarkable results. Until now, scholars have not found any original material or academic work that comprehensively, specifically, and continuously mentions the missionary results of Dominican missionaries in Eastern Tonkin in this period. However, through collecting and pairing somewhat fragmented content in some materials recorded by missionaries or archived by missionary organizations, researchers of Vietnamese Christianity history can still partly visualize the "missionary picture" of Dominican missionaries in the Eastern Tonkin region. Through several letters written from 1699 to 1705 by missionary Raymundo Lezoli, Bishop of the Diocese of Eastern Tonkin, currently archived at the Sacred Congregation for the Propagation of the Faith, it can be known that during this period, Dominican priests operating in this missionary area baptized 18,461 adults and 7,443 children. At the same time, 259,641 parishioners received the sacrament of reconciliation, and 10,048 people received the sacrament of confirmation from these missionaries of the religious order (Archivio della Congregazione per la Propagazione della Fede 1701–1704, f. 245, f. 264, f. 268; Archivio della Congregazione per la Propagazione della Fede 1705–1711, f. 95, f. 114, f. 118). During the years 1711–1719, although the Diocese of Eastern Tonkin faced a situation of having no bishop for a long time (1706–1721) along with the negative impacts of the decree banning Christianity issued in 1712 by the Tonkin government (Gispert 1928, 155), overcoming the above difficulties with many different measures, the Dominican missionaries operating in Eastern Tonkin at that time still baptized 7,007 adults and 11,650 children. They also performed the sacrament of reconciliation for 292,796 parishioners (Archivio della Congregazione per la Propagazione della Fede

1714–1725, f. 566, f. 571; Gispert 1928, 156; 159–160; 163; 166). In a letter sent to the Dominican Order Superior in Manila in 1777, missionary Feliciano Alonso, Bishop of the Diocese of Eastern Tonkin from 1790 to 1799, also said that at that time, the Dominican missionaries still maintained their stable management of over 74,930 parishioners in 40 residences in the Eastern Tonkin region (Gispert 1928, 287). In particular, by the late 18th century, the content of Dominican Order materials in Manila still showed great promise for missionary activity in the Eastern Tonkin region as the number of parishioners increased almost indefinitely (Gispert 1928, 304). Thus, although not yet complete, the above figures have partly demonstrated the constant efforts and endeavors in the missionary activities of Dominican missionaries in the Eastern Tonkin region in the 17th and 18th centuries.

4. Conclusion

The 16th, 17th, and 18th centuries were an entirely eventful period of missionary activity in Vietnam, with the participation of Western missionaries from many different missionary forces. From that process, researchers can easily recognize the "national mission" trend when "the Jesuit missionaries tried to protect and maintain Portugal's missionary prerogative. In contrast, the Society of Foreign Missions of Paris tried to establish leadership rights and France's influence on this country's missionary work. Meanwhile, Mendicant Orders backed by Spain also pursued similar goals." (Anh Thuan 2021a, 376) As part of the Mendicant Orders, the Dominican Order, of course, also cannot be outside the influence of this trend.

Although being one of the missionary forces present in different areas of present-day Vietnam since the mid-16th century, until the early 17th century, the evangelization activities of Dominican missionaries in this country had not yet achieved many results. There are many reasons to explain the above situation. The shortage of missionary human resources led to dioceses under the Portuguese (Goa, Malaca) or Spanish (Manila) could not continuously send large numbers of Dominican missionaries to Vietnam. Moreover, at that time, Dominican missionaries were still not interested in conquering the faith of the Vietnamese. Therefore, the study of the culture and language of this ethnicity has fallen into oblivion for a long time. That made the Dominican Order – One of the first Christian religious orders to have the opportunity to bring the light of the Gospel to the Vietnamese in the period 1550–1628, but when they returned to this country in 1676, they became "latecomers" compared to the Portuguese The Society of Jesus and the Society of Foreign Missions of Paris.

Furthermore, from the second half of the 17th century to the end of the 18th century, Dominican missionaries also had to face challenges from the policy of banning Christianity by the monarchical governments in Vietnam as well as conflicts taking place in Eastern Tonkin at that time, between the Italian bishops (Dominican Order or the Order of Saint Augustine), who the Holy See assigned to

manage this missionary area, and the Spanish Dominican missionaries, the force that had outstanding contributions in building this diocese. The above problems have more or less negatively affected the missionary activities of the Dominican Order. However, with constant efforts, these religious order missionaries still created positive changes in missionary activities in Vietnam. By the end of the 18th century, after nearly a century of being assigned by the Holy See to manage the Diocese of Eastern Tonkin (1698), Dominican missionaries had succeeded in attracting many Vietnamese to believe in Christianity and trained indigenous missionary forces. During that process, the Spanish missionaries also gradually affirmed their influence on the Dominican Order missionary work in Vietnam in general and the Eastern Tonkin region at that time and until the beginning of the 20th century.

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Alenka Arko

I temi antropologici della Costituzione pastorale «Guadium et spes» nel contesto della teologia post-conciliare: *In memoriam* del prof. Ciril Sorč

The Anthropological Themes of the "Gaudium et Spes" Constitution in the Context of Post-Conciliar Theology: In Memoriam *of Prof. Ciril Sorč*

Antropološke teme pastoralne konstitucije „Gaudium et spes" v kontekstu pokoncilske teologije: in memoriam *prof. Cirilu Sorču*

Riassunto: La Costituzione pastorale «Gaudium et spes», pubblicata esattamente 60 anni fa, rappresenta certamente un passo decisivo nella formazione del trattato chiamato antropologia teologica, che a tutt'oggi manca di una fisionomia definitiva, essendo ancora teso tra due dimensioni inseparabili e integrate: una sostanziale, ontologica e una esistenziale, che colloca la persona umana nel contesto della storia della salvezza. Il contributo del documento conciliare, che vuole essere soprattutto uno strumento pastorale della Chiesa, è prezioso sia per i temi che delinea sia per il linguaggio che adopera. Al centro stanno la nozione di uomo creato ad immagine di Dio e chiamato alla comunione con Lui e con i fratelli e il suo rapporto con il creato. Il Concilio propone Cristo, vero uomo, il nuovo Adamo, come punto di riferimento per ogni riflessione antropologica. Nonostante questi importanti passi, si tratta solo dell'*incipit* di una rinnovata riflessione antropologica, che in seguito svilupperà *in primis* la concezione dell'uomo come essere relazionale alla luce della vocazione alla filiazione divina, del suo carattere viatore, della reciprocità e della comunione tra le persone, e consequenzialmente la concezione del posto giusto dell'uomo in un mondo in cui tutte le cose create sono interconnesse.

Parole chiavi: antropologia teologica, Concilio Vaticano II, «Gaudium et spes», *imago Dei*, filiazione, *homo viator*, comunione, ecologia

Abstract: The Pastoral Constitution "Gaudium et spes", published exactly 60 years ago, certainly represents a decisive step in the formation of a treatise called the-

ological anthropology, which still does not have a definitive physiognomy and is still torn between two inseparable and complementary dimensions: substantial, ontological, and existential, which places humanity in the context of salvation history. The contribution of the conciliar document, which was intended primarily as a pastoral tool for the Church, is valuable both for the themes it outlines and for the language it uses. At its heart is the concept of man, created in the image of God and called to communion with God and with his brothers and sisters, and his relationship with creation. The Council proposes Christ, the true man, the new Adam, as the reference point for the entire anthropological reflection. Despite these important steps, however, this is only the beginning of the understanding of man as a relational being in the light of his vocation to sonship and his viatoric character, of mutuality and communion among people, and of man's proper place in creation, where everything is closely interconnected.

Keywords: theological anthropology, Second Vatican Council, "Gaudium et spes", *imago Dei* in man, adoptive sonship, *homo viator*, communion, ecology

Povzetek: Pastoralna konstitucija „Gaudium et spes", ki je bila objavljena pred natanko 60 leti, zagotovo predstavlja odločilen korak pri oblikovanju traktata, imenovanega teološka antropologija, ki še danes nima dokončne fiziognomije in je še vedno razpet med dvema neločljivima in obenem dopolnjujočima se razsežnostma: substancialno, ontološko in pa eksistencialno, ki človeka kot osebo postavlja v kontekst zgodovine odrešenja. Prispevek koncilskega dokumenta, ki naj bi bil predvsem pastoralno orodje Cerkve, je dragocen tako zaradi tem, ki jih začrta, kot zaradi jezika, ki ga uporablja. V središču je pojem človeka, ustvarjenega po Božji podobi in poklicanega začrta v občestvo z Bogom ter z brati in sestrami, in njegov odnos do stvarstva. Koncil predlaga Kristusa, pravega človeka, novega Adama, za oporno točko celotnega antropološkega razmišljanja. Kljub tem pomembnim korakom pa gre šele za začetek dojemanja človeka kot odnosnega bitja – v luči njegove poklicanosti k posinovljenju, resničnosti bitja na poti, vzajemnosti in občestva med ljudmi ter ustreznega mesta človeka v stvarstvu, kjer je vse ustvarjeno med seboj tesno povezano.

Ključne besede: teološka antropologija, drugi vatikanski koncil, Gaudium et spes, Božja podoba v človeku, posinovljenje, *homo viator*, občestvo, ekologija

1. Introduzione

Il 7 dicembre 2025 ricorreranno 60 anni dall'approvazione della Costituzione pastorale «Gaudium et spes», il documento conciliare più importante per l'antropologia teologica[1]. Prima del Concilio non esisteva un trattato dedicato specificamente all'antropologia. La neoscolastica aveva ridotto le questioni riguardanti l'uomo a natura e grazia, separate, senza un legame interiore l'una con l'altra, e al peccato

[1] Il presente articolo è stato preparato nell'ambito del progetto di ricerca «P6-0262», cofinanziato dall'Agenzia pubblica per il lavoro di ricerca e innovazione della Repubblica di Slovenia (ARIS).

originale come causa della drammaticità dell'esistenza umana. Dalla scolastica barocca derivava anche la questione del fine soprannaturale dell'uomo, che sfociava nella domanda spinosa sulla possibilità della creazione dell'uomo nello stato di natura pura[2]. Con il *ressourcement* invece la teologia viene ripensata alla luce della storia della salvezza con importanti contributi di molti teologi, tra i quali spiccano H. de Lubac e K. Rahner. Il primo tentativo di giungere a una sintesi più articolata e complessiva della questione antropologica, infatti, è rappresentato dalla voce «Anthropologie, theologische A.», pubblicata da Rahner nel *Lexikon für Theologie und Kirche* 1, 2 (1957, 618–627) pressoché alla vigilia del Concilio.

Il rinnovo della teologia animato dalla riscoperta della Bibbia e dei Padri della Chiesa ha portato al centro dell'interesse il tema dell'uomo creato ad immagine di Dio. Si tratta della categoria antropologica pivotale patristica, benché non spiegata in modo unilaterale. Possiamo persino dire che ogni Padre la sviluppa in modo personale, come si evince dalle opere dedicate ai singoli autori e alla loro antropologia uscite proprio prima, durante l'assise conciliare o poco dopo[3]. Ciò nonostante, presso tutti i Padri troviamo un tratto fondamentale comune – il vettore cristologico. Detto in altro modo, Gen 1,26 viene interpretato dai primi autori cristiani in modo tipologico a partire da Col 1,15: esiste un'unica immagine di Dio invisibile, Cristo, mentre gli uomini sono creati a sua immagine[4]. Alcuni autori del IV e inizio del V secolo, che senza rinnegare il fondamento cristologico lo «allargano» e interpretano in senso trinitario, rappresentano l'eccezione: l'uomo è creato ad immagine della Trinità (cfr. Gregorio di Nissa e Agostino d'Ippona).

«Gaudium et spes» è un documento non previsto prima del Concilio. Fu concepito in una situazione di sconcerto per gli scarsi risultati che emergevano nella

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[2] H. de Lubac già dagli anni '30 esplorava la questione in una serie di pubblicazioni: nel 1934 pubblicò «Remarques sur l'histoire du mot 'surnaturel'». *NRT* 61:225–249; 350–370; nel 1946 *Surnaturel: Études historiques*. Parigi: Aubier; nel 1949 «Le mystère du surnaturel». *RSR* 36:80–121 e nel 1965 i libri: *Augustinisme et théologie moderne*. Parigi: Aubier e *Le mystère du surnaturel*. Parigi: Aubier. Per la comprensione del pensiero dell'autore è importante anche l'opera del 1992: *Mémoire sur l'occasion de mes écrits. Namur: Culture et Vérité*. La sua tesi principale è che non esista nessuna contrapposizione tra natura e soprannatura, perché la comunione con Dio è il fine che l'essere umano desidera naturalmente. «Il paradosso umano è di essere creati con una sproporzione tra le nostre possibilità e la destinazione divina inscritta nella nostra stessa natura. La risoluzione di questa stessa proporzione non consiste nel restringere il desiderio umano limitandolo all'umanamente possibile, né tantomeno nel naturalizzare la destinazione soprannaturale, ma piuttosto nel situare il desiderio naturale di vedere Dio all'interno del disegno creatore e salvifico di Dio Trinità, che liberamente vuole colmare la sproporzione in una prospettiva di alleanza o unione interpersonale che mobilita sia la libertà divina che quella umana». (Bretschart 2022, 224)

[3] Menzioniamo solo alcuni: Leys, R. 1951. *L'image de Dieu chez Saint Grégoire de Nysse: Esquisse d'une doctrine*. Bruxelles, Parigi: Desclée de Brouwer; Bernard, R. 1952. *L'image de Dieu d'apres saint Athanase*. Parigi: Aubier; Ladner, G. B. 1954. «St. Augustin's Conception of the Reformation of Man to the Image of God». In: *Augustinus Magister*. 867–878; Parigi: Études augustiniennes. Crouzel, H. 1956. *Théologie de l'image de Dieu chez Origène*. Parigi: Aubier; Burghardt, W. J. 1957. *The image of God in man according to Cyril of Alexandria*. New York: Woodstock College Press; Otto, S. 1959. «Mensch als Bild Gottes bei Tertullian». *Münchener Theologische Zeitscrift* 10:272–282; Roldanus, J. 1968. *Le Christ et l'homme dans la théologie d'Athanase d'Alexandrie: Études sur la conjunction de sa conception de l'homme avec la christologie*. Leiden: Brill; Orbe, A. 1969. *Antropología di San Ireneo*. Madrid: BAC.

[4] Cfr. R. Cantalamessa, «Cristo Immagine di Dio. Le tradizioni patristiche su Colossesi 1,15». *Rivista di storia e letteratura religiosa* 16, nr. 2:181–212; 16, nr. 3:345–380. L'autore in questo articolo affronta dettagliatamente l'argomento.

stesura della costituzione sulla Chiesa, un «debito» del magistero che si protraeva ancora dal concilio di Trento. Il preludio della costituzione pastorale fu l'intervento del card. Suenens alla fine della prima sessione (4 dicembre 1962), che propose la suddivisione del documento «De Ecclesiae» in due: uno che trattasse la Chiesa *ad intra* (futura «Lumen gentium») e l'altro *ad extra* e cioè la Chiesa in dialogo col mondo (futura «Gaudium et spes»). Ciò portò all'elaborazione dello Schema XVII, intitolato «De Ecclesiae principiis et actione ad bonum societatis promovendum». Nella sua elaborazione furono impegnati i grandi teologi del Concilio: Daniélou, Congar, Philips e Garrone tra i francofoni e Rahner, Ratzinger, Semmelroth tra i tedeschi. Tutti quanti dovevano far fronte sia alla mentalità tradizionale, neoscolastica[5] sia alle esigenze della maggioranza dei padri conciliari di scrivere un documento prevalentemente pastorale, rispondente alle esigenze pratiche, concrete, senza addentrarsi nelle questioni dottrinali, dogmatiche.

La Costituzione è un *collage* scritto da molte mani durante una gestazione del testo lunga e travagliata, rimasto poco armonizzato anche per la mancanza del tempo[6]. In aula fu discusso due volte: il 20 ottobre 1964 (testo di Zurigo del febbraio 1964) e il 21 settembre 1965 (testo di Ariccia, inverno 1965, noto come Schema XIII). Dopo la prima discussione, tra le molte osservazioni per il nostro argomento le principali furono le seguenti: chiarire ancora il nesso tra fine naturale e soprannaturale dell'uomo, sviluppare la teologia del peccato e della croce contro un eccessivo ottimismo antropologico dello schema (Scanziani 2020, 44). Si discutevano, insomma, argomenti di estrema importanza nei trattati *De Deo creante et elevante, De peccato originali, De Gratia, De Virtutibus*. Il clima attorno alla futura Costituzione pastorale prima del secondo dibattito conciliare nell'autunno 1965 fu tutt'altro che pacifico e favorevole alla proposta. Nella discussione ci furono 160 interventi orali, a cui si aggiunsero 470 pagine di quelli scritti. Il testo corretto e integrato fu distribuito nella prima metà di novembre e votato il 17 novembre. Il risultato: 2447 *vota iuxta modum* con circa 20.000 proposte e 220 pagine di emendamenti (Turbanti 2000, 737). Il tempo rimasto per le integrazioni fu pertanto veramente ristretto: tre settimane. La Costituzione fu approvata come ultimo atto del Concilio in clima di contrasti, tensioni e titubanze, l'ultimo giorno dell'assise.

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[5] I teologi del Concilio non rigettano la scolastica e il tomismo, ma piuttosto sottolineano la necessità di ritornare al pensiero genuino di san Tommaso. Ne è testimone Y. Congar: «Esiste un San Tommaso fissato in un insieme di tesi prese materialmente /…/ Da circa quarant'anni, lo studio storico di san Tommaso ci ha fatto meglio comprendere, al di là delle tesi scolastiche prive di freschezza, la potentissima originalità di san Tommaso. /…/ Tali opere ci restituiscono la reazione originaria di san Tommaso, le sue percezioni veramente creative, più profonde e più aperte, più accoglienti verso i punti di vista moderni, di quanto il tomismo dei comtmentatori e dei manuali classici ci facesse sospettare. È questo San Tommaso che dobbiamo frequentare e alla cui scuola dobbiamo metterci». (1967, 54)

[6] Sulla storia del testo vedi: Scanziani 2020, 15–60. 95–98 con ampia bibliografia. Uno studio approfondito della genesi del documento è offerto dal testo di Pesch, Otto. H. 1993. *Das Zweite Vatikanische Konzil. Vorgeschichte - Verlauf - Ergebnisse - Nachgeschichte*. Würzburg: Echter e Turbanti, G. 2000. *Un concilio per il mondo moderno. La redazione della costituzione pastorale* Gaudium et spes *del Vaticano II.* Bologna: Il Mulino.

2. L'antropologia della «Gaudium et spes»

Secondo Ladaria (1992, 26), «Gaudium et spes» ci offre «una valida sintesi di antropologia», anche se dobbiamo riconoscere un forte debito pagato alla teologia manualistica, sostanzialmente deduttiva. Scola (2000, 94–95) denuncia la giustapposizione di due modelli, il tradizionale e il nuovo. Nella prima parte (*Proemio* e parte introduttiva) troviamo un'antropologia più dinamica, attenta alla persona storicamente situata, mentre le parti successive manifestano un taglio statico, astorico.

Il Concilio senza dubbio mette l'uomo al centro della Costituzione pastorale, anche se il tema non appare nel titolo del documento. Il tema antropologico viene annunciato già nel *Proemio* che riporta tre accenti: il carattere personale dell'uomo (essere relazionale), la sua vocazione divina (rapporto con Dio) e la fratellanza (dimensione sociale):

> «E' l'uomo, dunque, ma l'uomo considerato nella sua unità e nella sua totalità, corpo e anima, l'uomo cuore e coscienza, pensiero e volontà, che sarà il cardine di tutta la nostra esposizione. Pertanto, il santo Concilio, proclamando la grandezza somma della vocazione dell'uomo e la presenza in lui di un germe divino, offre all'umanità la cooperazione sincera della Chiesa, al fine d'instaurare quella fraternità universale che corrisponda a tale vocazione». (GS 3)

Oltre questi snodi antropologici, che cercheremo di analizzare in seguito, è importante il fatto che la Costituzione rifiuti l'uso della terminologia scolastica in favore di quella biblico-patristica. Del resto, l'impostazione dell'antropologia nella «Gaudium et spes» è del tutto classica: il peccato è visto persino nella prospettiva amartiocentrica (GS 13), i singoli elementi sono giustapposti, come ad esempio i costitutivi dell'umano – anima e corpo (GS 14), l'intelligenza (GS 15) e la libertà (GS 17), la coscienza viene inserita tra i termini antropologici (GS 16). La ragione risiede non solo nella sensibilità della maggioranza dei padri conciliari, ma anche nell'obiettivo del documento che è prettamente pastorale. Ciò rappresenta, inoltre, il motivo per cui gli altri argomenti dogmatici sono mescolati con quelli della teologia morale e della dottrina sociale della Chiesa.

2.1 L'importanza della relazionalità

Dopo il *Proemio*, il capitolo 1 è dedicato alle questioni strettamente antropologiche: GS 12–22. GS 12 chiaramente pone l'uomo come centro e criterio dell'universo: «tutto quanto esiste sulla terra deve essere riferito all'uomo, come a suo centro e il suo vertice». Quest'uomo così grande, ma anche enigmatico è persona, essere relazionale, creato ad immagine di Dio. Possiamo dire che questa affermazione sia il contributo conciliare più consistente per l'antropologia teologica insieme alla prospettiva cristologica di GS 22. Come essere creato ad immagine di Dio, l'uomo è in una particolare relazione con il Creatore, è capace di dialogare con Lui, porsi davanti a Lui come di fronte a un Tu:

> «Il suo ruolo nell'universo è quello di essere il luogotenente di Dio, il suo 'più stretto' collaboratore. In tal senso, l'essere dell'uomo in quanto crea-

to, è sì un essere fragile, dipendente, ma nello stesso tempo, grazie alla relazione fondativa con Dio, egli partecipa della stessa grandezza del Suo Creatore. L'uomo non è così una realtà circoscritta a una dimensione immanente e orizzontale, ma è un essere aperto al trascendente e quindi verticalmente rivolto al quanto lo supera». (Ancona 2020, 167)

Il rapporto con Dio è anche il fondamento delle relazioni con gli uomini, *in primis* tra maschio e femmina (GS 12; 47–52), con i simili nella società (GS 23–32), e con il creato, specialmente mediante l'attività dell'uomo nel mondo, mediante il lavoro (GS 33–39). La realizzazione della relazionalità umana in tutte le sue dimensioni porta sia alla pienezza della individualità sia all'edificazione della società, nonché al giusto rapporto con l'universo. La teologia post-conciliare raccoglierà tutte queste dimensioni della relazionalità sotto la categoria «immagine di Dio»[7]. Anche se questo snodo fu presente fin dagli inizi della redazione del documento conciliare e rappresenta la presa di distanza da un approccio metafisico, verso una direzione biblico-patristica, il testo della «Gaudium et spes» tuttavia non ci offre una visione così larga della categoria «immagine di Dio». I commentatori sottolineano la costante oscillazione tra il significato veterotestamentario dell'immagine (Gen 1,26-28) e quello neotestamentario, cristologico presente nell'epistolario paolino e il suo ampliamento patristico[8]. In ogni modo l'uso della categoria conferma la ricerca coraggiosa di un nuovo modello di antropologia teologica che anche dopo il Concilio non fu unanimemente recepito, soprattutto perché spesso sospettato di platonismo o ancor più perché risultava vago, poco concreto e definito, come del resto è ancora.

2.2 Il vettore cristologico

La relazionalità dell'uomo, mediante la cui attuazione la persona raggiunge la pienezza, non è un dato creaturale, ma è una vocazione divina. La scelta del tema della vocazione divina dell'uomo nella Costituzione fu strategica e fondamentale per superare la divisione tra i due ordini separati e profondamente impressi nella mentalità dei padri conciliari: naturale e soprannaturale. La categoria «vocazione» esprime la verità per cui la fine dell'uomo – la comunione con Dio – sia un dono completamene gratuito e ricevuto senza qualsiasi merito o condizione previa, già prima della creazione; allo stesso modo attesta pure che egli è inserito in Cristo nella creazione e non soltanto dopo la caduta o in seguito all'opera redentrice del Figlio di Dio. I commentatori del testo oggi sono unanimi nel sostenere che il Concilio, pur tracciando questa prospettiva, non sia riuscito a svilupparla[9], sebbene

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[7] Un buon esempio è il documento della Commissione teologica internazionale «Comunione e servizio: La persona umana creata a immagine di Dio» (2004).

[8] Sembra che lo sguardo patristico prevalga, anche se la Costituzione raccoglie solo alcuni elementi della dottrina patristica. Degli autori cristiani antichi nel primo capitolo della GS vengono citati solo Agostino (*Confess*. I,1) e Tertulliano (*De carnis resurr*. 6). Ciò sorprende, visto che negli altri documenti conciliari i Padri della Chiesa sono molto più presenti. Bisogna sottolineare anche il fatto che il discorso teologico della GS inizia con Adamo e non con Cristo.

[9] L'argomento cristologico in tutte le parti della Costituzione funge piuttosto da appendice (Ladaria 1987, 942). Colombo (1970, 491) è estremamente acuto e critico nell'affermare che di conseguenza la Costituzione «nonostante la positiva esclusione della teologia dei due ordini, ripropone, senza superarla,

abbia aperto la strada a tale visone soprattutto attraverso la riscoperta del fondamento cristologico dell'antropologia (Brambilla 2007, 101), espresso in GS 22.

GS 22 spesso è considerato l'apice dell'antropologia conciliare ed è senza dubbio il paragrafo della Costituzione maggiormente recepito. Joseph Ratzinger (2012, 857), pochi anni dopo il Concilio, scrisse che esso rappresenta il primo testo magisteriale che propone la questione antropologica in una visione cristocentrica:

> «mediante Cristo, introduce l'uomo nel discorso su Dio, scoprendo la più profonda unità della teologia. Il testo della nostra costituzione, che in genere è teologicamente piuttosto riservato, raggiunge qui una notevole altezza e indica il cammino per l'indirizzo del pensiero teologico nella nostra situazione».

Il testo è infatti una sintesi di tutti i paragrafi precedenti a partire da GS 12: tutto ciò che è stato detto sull'uomo e la sua vocazione trova la luce giusta proprio qui. Cristo, fattosi carne, rivela all'uomo la sua vocazione in pienezza. Dio ha sempre pensato l'uomo e l'universo in relazione a suo Figlio. Il criterio dell'interpretazione dell'umano non è una dottrina, un sistema delle idee, ma una persona:

> «Si è passati dal Cristo *perfecte Homo* della tradizione calcedonese (e poi tradizionale in teologia) al Cristo *Homo perfectus,* proprio come sviluppo della medesima tradizione calcedonese, ma in senso più dinamico. Qui, in *Gaudium et spes*, l'antropologia da *teologica,* con la prevalenza della visione dell'*homo imago Dei,* si sviluppa decisamente in *antropologia cristologica*». (Ciola 2012, 60–61)

Il testo sottolinea l'importanza dell'incarnazione, che rende l'uomo figlio adottivo di Dio e lo colloca in una condizione salvifica, il valore redentivo della Pasqua di Cristo, in cui trova risposta anche l'enigma della morte. Con la menzione della circolarità tra Cristo e lo Spirito, in seguito, il testo per lo meno abbozza la prospettiva pneumatologico-trinitaria. È lo Spirito infatti che conforma l'uomo a Cristo, nuovo Adamo, e lo rende partecipe della vita stessa di Dio, che trova il compimento escatologico nella resurrezione. L'azione dello Spirito ha una dimensione universale, in quanto rende possibile il compimento della vocazione filiale non solo ai cristiani, ma anche ad ogni uomo (Ancona 2020, 206–208).

Si è provato quindi a superare il classico cristocentrismo occidentale, ma uno sviluppo più coraggioso si vedrà solo nei decenni dopo il Concilio.

> «Pur dichiarando Cristo come il criterio base, la sua esecuzione lo colloca ancora in seconda battuta /…/ L'analisi dell'umano è già stata compiuta a partire da altri riferimenti e il legame con la parte precedente e con la cristologia è piuttosto estrinseco. Oltretutto, la comprensione del nesso cristologia-antropologia rivela una notevole incertezza, poiché non arriva a fondarlo fin dalle origini nel momento della creazione». (Scanziani 2020, 75)

La carenza cristologica si può notare anche nello sviluppo della dimensione sociale dell'uomo (cap. 2), in cui la sua indole comunitaria è solo «perfezionata e

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l'antropologia dei manuali. Nella marcia di avvicinamento al principio cristocentrico lascia il suo progetto in mezzo al guado».

compiuta dall'opera di Gesù Cristo» (GS 32.2). Sembra che la solidarietà umana prescinda da Cristo oppure che lo preceda. Lo possiamo osservare anche per quanto attiene all'attività dell'uomo nel mondo (cap. 3).

3. La riflessione antropologica dopo il Concilio

Che cosa è successo dopo il Concilio? Come la teologia ha sviluppato i temi proposti? Quali svolte dogmatiche possiamo osservare? Direi soprattutto quattro: la visione dell'uomo come immagine filiale di Dio, il carattere dinamico, storico della identità umana, che si sta modellando nella cooperazione o meno con l'amore di Dio – *homo viator*, l'allargamento del tema della natura sociale e comunitaria in relazione alla teologia trinitaria e la questione cosmologica nel dialogo con la scienza e di fronte alla crisi ecologica.

3.1 L'uomo immagine filiale di Dio

Se l'uomo è creato ad immagine di Cristo e se la pienezza della sua vita sta nel conformarsi a Lui, il compimento dell'esistenza non solo cristiana, ma anche umana, è nella filiazione. Dio crea gli esseri umani per adottarli a figli. Si tratta della predestinazione, previa e indipendente da ogni decisione umana (cfr. Ef 1,4-5). La teologia post-conciliare ha ampiamente sviluppato questa lettura patristica della teologia paolina, che troviamo magistralmente esposta già presso Ireneo di Lione (*Adv. haer*. III, 19). La scelta della categoria della filiazione come quella centrale è motivata dal fatto che ciò che di più profondo Cristo rivela del suo essere è che Egli è l'unigenito Figlio di Dio. È questo il titolo cristologico neotestamentario per eccellenza, perché esprime meglio la sua persona nell'unica relazione col Padre e necessariamente include anche la dimensione pneumatologica, perché l'uomo solo mediante il dono dello Spirito può diventare l'immagine filiale di Dio, figlio nel Figlio, dato che per natura il Figlio di Dio è solo Cristo. Le creature non potranno mai superare la propria condizione creaturale per entrare nella vita divina e tanto meno raggiungere questo scopo con le proprie forze. (Ladaria 2009, 45–46; 54–71)

Nonostante la chiarezza dogmatica sulla questione della filiazione, si profila un'altra domanda che esprime sia la mancanza di rigore nella riflessione sia il tentativo di fare dei salti nella comprensione dello svolgimento dell'economia della salvezza: la concezione di Cristo, Figlio di Dio, primogenito di ogni creatura (cfr. Col 1,15), presuppone anche una filiazione creaturale, quindi non è risultato dell'inserimento dell'uomo in Cristo dopo la Pasqua? Recentemente Christof Betschart (2022) ha proposto una risposta affermativa, in base ai testi biblici, all'insegnamento del Concilio e alla spiritualità carmelitana. L'Antico[10] e il Nuovo

[10] In Gen 5,1-3 essere creati ad immagine di Dio significa, metaforicamente parlando, essere generati come figli di Dio. La stessa idea troviamo in Deutero Isaia (Is 45,12). In altri brani veterotestamentari il rapporto Padre-figlio si dispiega tra Dio e il re d'Israele (cfr. 2 Sam 7,14) oppure tra Dio e il suo popolo. Ma ci sono anche testi che chiamano Israele figlio primogenito di Dio, lasciando presupporre una filiazione universale, inclusiva (cfr. Es 4,22; Ger 31,9; Sir 17,18; 36,17). Una tale filiazione è affermata anche nel

testamento[11] infatti a prima vista favoriscono una risposta affermativa, l'uomo e ogni creatura già fin dalla creazione sono costituiti come figli, ma una analisi più dettagliata mostra che si tratta piuttosto di una metafora: la creazione nella Bibbia spesso viene concepita come generazione. La creazione nel tempo, tuttavia, non può essere comparata alla generazione del Figlio «prima di tutti i secoli». Il Credo niceo-costantinopolitano, infatti, è chiarissimo, quanto alla generazione di Cristo nella vita della Trinità immanente: «generato, non creato». (DH 125) Ci sono due modi diversi di giungere all'esistenza filiale: la generazione, che si riferisce solo al Figlio di Dio, e la creazione degli umani, che ha luogo nell'economia della salvezza.

E non solo, anche dopo l'incarnazione del Figlio, che nella vita intradivina è *Unigenito*, la relazione filiale della creatura con Dio Padre è essenzialmente diversa da quella del Verbo incarnato. Il Figlio, diventato creatura, in tutto simile a noi, è vero Dio e vero uomo. In Lui la natura divina e quella umana sono unite ipostaticamente nella persona divina di Cristo, Figlio unigenito. Noi uomini siamo solo umani e possiamo diventare figli solo se veniamo inseriti per grazia nella sua relazione filiale, dopo la sua Pasqua, quando Egli diventa «il *Primo*genito tra quelli che risorgono dai morti» (Col 1,18), cioè quelli che gli appartengono per grazia e che liberamente scelgono di essere i figli di Dio, i figli nel Figlio e per mezzo del Figlio. Questa prospettiva è molto chiara nell'epistolario paolino (Bianchini 2017, 9–14; Peppard 2011, 92–110). La filiazione degli uomini è dunque l'espressione della ri-creazione dell'uomo, della vita rinnovata per grazia. Certo, il fatto di essere creati in Cristo, per mezzo di Cristo e in vista di Cristo (cfr. Col 1,16) presuppone un'impronta filiale nelle creature e specialmente nell'uomo fin all'inizio, ma si tratta solo di un fondamento per la filiazione, una possibilità offerta di diventare figli che si realizza a condizione di una scelta personale, libera (Brambilla 2007, 166–171; 201–207). Infatti, anche senza la caduta, senza la rinuncia al rapporto con Dio, l'uomo per realizzare la propria vocazione avrebbe dovuto liberamente scegliere la filiazione.

3.2 L'uomo – essere libero e in cammino

Il tema della libertà (non ridotta al libero arbitrio, ma in quanto realtà portante della persona in relazione fondativa con Dio), tracciato soprattutto in GS 17, presuppone la necessità di guardare alla categoria dell'immagine non più solamente nei termini di una proprietà ontologica, irremovibile e indistruttibile, come spesso si afferma, ma anche e soprattutto protesa al divenire, all'approfondimento della relazionalità. D. J. Hall (1998), in un famoso saggio, chiama la visione classica dell'immagine «so-

documento «Che cosa è l'uomo» della Pontificia Commissione Biblica (nn. 10 e 348) e da Jeremias (1966).

[11] Alcuni testi neotestamentari fanno intuire che tutti gli uomini sono figli di Dio, non solo i cristiani. L'apostolo Paolo, ad esempio, nel suo discorso all'Aeropago (At 17,28), afferma che tutti siamo la stirpe (*genos*) di Dio, cioè suoi figli. Nella profezia di Caifa – secondo cui Gesù deve morire non solo per la nazione, cioè Israele, ma anche «per riunire insieme i figli di Dio che erano dispersi» (Gv 11,52) – appare la stessa idea. Gesù non è quindi venuto per rendere gli uomini figli di Dio, ma per ristabilirli in questa dignità. Anche 1 Cor 8,6 sembra sostenere la stessa idea: «per noi c'è un solo Dio, il Padre, dal quale tutto proviene e noi siamo per lui».

stanzialista», rigettandola a favore di quella relazionale e funzionale[12]. I problemi più grandi della spiegazione «ontologica» sono senza dubbio in primo luogo una concezione statica della persona, legata spesso al dualismo corpo-anima, perché nella prospettiva occidentale a partire da sant'Agostino l'immagine viene impressa solo nell'anima, in secondo luogo un antropocentrismo sbagliato (Visala 2014, 101–120). La critica di Hall è sotto l'influsso della filosofia dialogica che unilateralmente rigetta l'ontologia e misconosce la verità secondo cui l'essere umano, prima di entrare in relazione, deve esistere e che l'esistenza è già relazionale in quanto la creatura «è», «esiste» soltanto perché in relazione con il Creatore. L'esistenza è sempre relazionale. Inoltre, senza le «proprietà» dell'immagine legate allo statuto ontologico della persona, quali la capacità di auto-comprendersi, di amare e di libertà, le relazioni sono semplicemente impossibili. Per queste ragioni non si può preferire la visione «relazionale» a scapito di quella «sostanziale». Sono importanti ambedue e testimoniano che l'uomo è veramente paradosso e mistero.

L'uomo ad immagine in prospettiva dinamica è un essere in cammino, *homo viator*, non certo di ritorno allo stato protologico, prelapsario, nel paradiso perduto, ma piuttosto indirizzato verso la pienezza della sua identità[13] resa definitiva nella morte. L'uomo fu creato come un «progetto» destinato ad essere sviluppato lungo la vita nel dialogo fecondo della sua libertà con le altre libertà: quella di Dio e quella degli altri uomini. Alla domanda perché l'uomo non sia stato creato già maturo, perché debba superare il cammino spesso tanto faticoso e intriso di sofferenza non causata unicamente dal peccato, ma dal cammino stesso, dalla fatica di dover liberamente modellare la propria identità nelle molteplici relazioni, la teologia risponde: perché in questo modo si rivela la grandezza dell'amore di Dio. Egli ci vuole co-autori del nostro destino finale.

Nel periodo successivo al Concilio fu pubblicata una serie di trattati di antropologia a partire dalla prospettiva della libertà[14]: non libertà come risultato dell'autoaffermazione dell'uomo, ma prima di tutto come dono e poi come compito, quindi come autodeterminazione. La libertà viene vista «come 'relazione' (prima donata e poi voluta)» (Brambilla 2007, 383). È donata come relazione alla propria origine che dischiude il cammino per l'esperienza della vita. In quanto donata «appare in prima battuta come promessa, è data /…/ perché sia scelta come compito per il proprio cammino /…/ da scegliere e per cui spendersi» (Brambilla 2007, 386). Una realtà a volte faticosa, persino troppo, ma l'unica capace di illuminare profondamente la realtà dell'uomo creato ad immagine di Dio.

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[12] Hall sviluppa il suo pensiero, riflettendo sul posto dell'uomo a partire dalla crisi ecologica e affermando che la funzione che Dio ha attribuito all'uomo è quella di amministratore del creato. Si rinviene uno sviluppo della sua riflessione ad esempio in: J. R. Middleton. 2005. *The Liberating Image. The* Imago Dei *in Genesis 1*. Grand Rapids/MI: Brazos Press. Vedi anche: O. H. Pesch, J.-M. Van Cagh (edd.). 2006. *L'homme, immage de Dieu. Donées bibliques, historique et théologiques*. Bruxelles: Académie internationale des Sciences religieuses.

[13] Questa visione dinamica dell'immagine viene sottolineata nel documento della Commissione Teologica Internazionale «Comunione e servizio: persona umana creata ad immagine di Dio» (2004), n. 24.

[14] Cfr. K. Rahner. 1968. «Teologia della libertà». in: *Nuovi Saggi.* Vol. I. 306–322. Roma: Paoline; 2009. *Il morire cristiano*. Brescia: Queriniana; O. H. Pesch. 1988. *Liberi per grazia: Antropologia teologica*. Brescia: Queriniana; I. Sanna. 1990. *Immagine di Dio e libertà umana.* Roma: Città Nuova; G. Greshacke. 2002. *Libertà donata: Introduzione nella dottrina della grazia*. Brescia: Queriniana.

3.3 Comunione e reciprocità

Il titolo del capitolo secondo della «Gaudium et spes» «La comunità degli uomini» (nn. 23–39) si concentra sulla comunione tra le persone. I commentatori della Costituzione riconoscono all'antropologia del testo «una costitutiva *dimensione comunionale*, considerata a partire dal suo fondamento cristologico» (Branccaio 2006, 12). I temi trattati però sono più morali, sociali e pastorali che dogmatici. Vediamo una sintesi degli argomenti di dottrina sociale della Chiesa, sviluppati da Leone XIII fino a Paolo VI. Nel quadro degli aspetti dogmatici, la dimensione comunionale si manifesta più sul piano soteriologico che ontologico e protologico. Pur sostenendo che lo spirito comunitario corrisponde alla natura creata dell'uomo e che egli deve cercare e coltivare la comunione attraverso l'amore, GS 24 non va oltre. C'è solo un accenno al fatto che, grazie alla propria natura, gli uomini comprendono che la loro vita è strettamente legata al mistero di Dio uno e trino e che la vita sociale è *simile* alla comunità intradivina.

Dopo il Concilio questa intuizione è stata approfondita soprattutto grazie alla riflessione trinitaria, che ha sottolineato le relazioni tra le persone nel Dio trino, piuttosto che l'unica sostanza ovvero l'essenza di Dio[15]. Ci si è soffermati sulla analogia relationis[16]. Nel centro viene posto il mistero dell'alterità che nella comunione conserva la distinzione. Il modello che 'approva' e 'verifica' questa visione è proprio l'Essere di Dio come Agape – come relazione reciproca e trinitaria di Padre, Figlio e Spirito Santo. In altri termini, la Trinità è principio di comunione nella differenza, «la Trinità dice un Dio che è ‹unus in pluribus›, un Dio non solitario ma in relazione, un Dio che è comunione» (Cozzi 2013, 786). Il fondamento teologico del carattere «sociale» della persona umana sta pertanto nel fatto che l'uomo è creato ad immagine della Trinità, che è comunità perfetta dove le tre Persone sono in reciproca ed eterna autodonazione[17].

A questo sviluppo è legato anche un ripensamento della nozione di persona, tanto in Dio, quanto nell'uomo. La teologia trinitaria non si focalizza più sulla persona come individualità sussistente e auto-cosciente (Tommaso d'Aquino, *S. Th.* I, q. 29, a 4), ma è attenta alla relazione reciproca e pericoretica. Ogni persona in Dio è fin dall'origine data in relazione alle altre e si dona completamente alle altre. Prendendo spunto da questa visione trinitaria, anche nell'antropologia si passa dal personalismo orizzontale, dal rapporto io-tu all'importanza dell'interpersonalità,

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[15] Scrive W. Kasper (1984, 214): «Assistiamo ad una rivoluzione nel modo d'intendere l'essere. La realtà ultima e suprema non è quella della sostanza bensì quella della relazione. Per Aristotele la relazione appartiene agli accidenti che vengono ad aggiungersi alla sostanza /.../. Ma se Dio stesso si manifesta come il Dio dell'alleanza e del dialogo, e il suo nome significa 'per noi' e 'con noi', la relazione non viene dopo la sostanza ma prima /.../. Il senso dell'essere non è quindi la sostanza in se stessa bensì l'amore che si comunica».

[16] Il primo ad usare il termine fu K. Barth (1947, 219).

[17] «La Trinità è assoluta unità, in quanto le tre divine Persone sono relazionalità pura. La trasparenza reciproca tra le Persone divine è piena e il legame dell'una con l'altra totale, perché costituiscono un'assoluta unità e unicità. /.../ le relazioni tra gli uomini lungo la storia non hanno che da trarre vantaggio dal riferimento a questo divino Modello. In particolare, alla luce del mistero rivelato della Trinità si comprende che la vera apertura non significa dispersione centrifuga, ma compenetrazione profonda. /.../ La rivelazione cristiana sull'unità del genere umano presuppone un'interpretazione metafisica dell'*humanum* in cui la relazionalità è elemento essenziale». (Benedetto XVI. *Caritas in veritate,* n. 54)

capace di prevenire una relazione egoistica tra i due e di aprirsi al terzo, indispensabile per l'autentica comunione. L'interpersonalità tra le persone umane è pertanto fondata sulla mediazione di Cristo, in virtù dell'unione ipostatica.

Il dogma di Calcedonia proclama in Cristo l'unità «senza separazione» e «senza confusione» tra la natura umana e divina in unica persona divina nella pericoresi teandrica dell'essere «uno in Cristo Gesù» in virtù dello Spirito Santo (Coda 2011, 560). L'interpresonalità tra le persone umane consiste nell'abitare l'uno nell'altro senza cancellare sé e senza cancellare l'altro, ovvero si riconosce il darsi dell'altro nel darsi a propria volta. «Il rapporto tra la dinamica trinitaria della vita delle Persone divine e il rapporto, in Cristo, delle e tra le persone create in questo modo non è più soltanto di analogia, ma di mutua interiorità, resa gratuitamente disponibile dall'incarnazione del Figlio di Dio e dal dono pasquale dello Spirito». (561)[18]

La conseguenza di tale concezione è che la comunione autentica, quella rivelata dalla Trinità è possibile solo a patto della dedizione, del dono, della kenosi assolutamente libera, altrimenti vita di qualsiasi comunità e della società è destinata a rimanere segnata da tensioni, divisioni, guerre che contraddicono la realizzazione del piano divino (cfr. Gv 17,21). Nella teologia cattolica il primo a dedicarsi all'argomento fu H. U. von Balthasar (1999, 301), convinto che ogni amore vero tra gli uomini può provenire soltanto dalla kenosi «del cuore paterno nella generazione del Figlio» in cui «sta già incluso ogni altro possibile dramma tra Dio e un mondo, dal momento che un mondo può avere il suo luogo soltanto all'interno della differenza del Padre e del Figlio, tenuta aperta e insieme superata dallo Spirito Santo». Le intuizioni di von Balthasar furono recepite sia dalla riproposta della cosiddetta ontologia trinitaria[19], sia da diversi teologi che prendono spunto dalla fenomenologia del dono (Repole 2019, 101-–156).

3.4 L'uomo e il cosmo

Abbiamo già sottolineato la visione antropocentrica della «Gaudium et spes»: tutto nel mondo è stato fatto per l'uomo – «centro e vertice» (GS 12), certo non per sfruttamento sfrenato e distruzione, ma affinché anche attraverso il rapporto con la natura l'uomo possa raggiungere la propria fine – Dio, «attuare la sua integrale vocazione» (GS 35) che comprende anche la salvezza del creato (cfr. Rom 8,19-21; 1 Cor 15,28). L'argomento dell'interdipendenza dell'uomo e del creato

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[18] Una tale concezione spiega perché l'uomo maturi come persona non solo nel suo rapporto con Cristo, ma anche nel rapporto con l'altro in Cristo. «In-Cristo il rapporto intersoggettivo si realizza nella logica pericoretica del dono di sé all'altro e dell'accoglimento in sé dell'altro nello spazio di novità/apertura dello Spirito Santo: secondo la dinamica pasquale di morte-resurrezione, e cioè di dono di sé che apre al pieno autopossesso di sé nella libertà della relazione all'A/altro». (Coda 2011, 562) Non si tratta semplicemente del rapporto «faccia a faccia» personalistico dei due, ma indefinitivamente aperto che non tocca solo il prossimo con cui direttamente mi incontro, ma ciascun uomo e anche le istituzioni e la società.

[19] Fu proprio per i 70 anni di H. U. von Balthasar che Klaus Hemmerle, considerato l'autore che riscoprì l'ontologia trinitaria, scrisse il suo *Thesen zu einer trinitarischen Ontologie* (1976). Oggi è in corso una viva ricerca in questo campo, che propone la rilettura di tutta la teologia come possibilità di ricuperare l'ontologia attraverso «la presa di coscienza del rapporto complesso fra la filosofia greca e la rivelazione ebraico-cristiana, lungo il corso della formazione della cultura occidentale». (Coda 2011, 557)

viene espresso da GS 36, che parla dell'autonomia dell'uomo ovvero del fatto che Dio ha affidato il creato all'essere umano, sottolineando che il potere dell'uomo tuttavia non è illimitato, assoluto, ma relativo. L'uomo non ha il diritto di sfruttare e distruggere la natura. Gli è lecito solo usare e sviluppare ciò che il Creatore ha posto nel creato come potenzialità affinché anche esso possa raggiungere la pienezza in Dio.

Si tratta di un elemento nuovo del magistero non legato direttamente alla questione antropologica, ma piuttosto alla preoccupazione degli scienziati di un rapporto troppo stretto tra attività umana e religione. Il punto che la Costituzione vuole sottolineare è che il mondo creato possiede un insieme

> «di leggi e valori che sono propri delle cose create e delle società, di fronte ai quali l'uomo può e deve assumere un atteggiamento positivo, mediante un graduale processo di scoperta, uso e ordinazione, perché essi rispondono non solo a un'istanza di carattere storico-culturale, ma anche teologica». (Ancona 2020, 258)

Su questa base la Costituzione invita in primo luogo all'attenzione e alla considerazione seria di questa realtà, in secondo luogo all'epistemologia rigorosa, propria di ogni scienza e settore del pensiero umano, e al rispetto delle norme morali, il cui fondamento ultimo è il valore dell'uomo creato ad immagine di Dio. Il creato non può essere staccato da Dio, perché «la creatura senza il Creatore svanisce». (GS 36)

Due anni dopo il Concilio, fu pubblicato l'ormai famoso articolo di Lynn White «The Historical Roots of Our Ecologic Crisis»[20], in cui egli punta il dito contro i cristiani e la loro interpretazione di Gen 1,28 ovvero il comando di Dio all'uomo di «dominare» la terra, e di conseguenza li considera responsabili della crisi ecologica[21], A distanza di 60 anni il suo scritto sembra più profetico che offensivo e ancora di più invita a ripensare e a non rigettare l'antropocentrismo cristiano, ma a distanziarsi solo da quello sbagliato. Papa Francesco ultimamente nella «Laudate Deum» (67) ha parlato di un «antropocentrismo situato», una espressione non comunemente compresa e recepita, ma che in fondo vuole sottolineare la molteplicità delle relazioni che l'uomo deve considerare e rispettare. Nonostante lo sviluppo dell'esegesi e della teologia biblica, infatti, insistiamo ancora troppo sull'errata interpretazione di Gen 1,28 in duplice senso: o insistendo sull'uomo «padrone» della terra o spogliandolo dalla sua dignità unica nell'universo, accomunando tutte le creature allo stesso livello. La prima visione fu almeno in parte consolidata nella svolta antropologica fondata sull'*ego* cartesiano, da cui proviene un «antropocentrismo assiologico», in cui il soggetto individuale è il criterio assoluto di ogni verità e bontà e che porta a un «antropocentrismo predatorio», che

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[20] (*Science*. NS. Vol. 155, No. 3767 (10 March 1967):1203–1207).

[21] Per una risposta da parte dei biblisti su quanto le tesi di White siano inconsistenti vedi: J. Barr. 1974. «Man and Nature. The Ecological Controversy and the Old Testament». in: *Ecology and Religion in History*. D. and E. Spring. New York: Harper & Row. E più recente: J. Blenkinsopp. 2004. Creation, the Body, and Care for a Damaged World. in: *Tresure old & new. Essays in the Theology of the Pentateuch*, 36–52. Grand Rapids, Michigan: W. B. Erdamans.

concede al creato solo il valore strumentale. Ora la «Gaudium et spes» rigetta decisamente tale antropocentrismo. Il suo, come del resto anche quello biblico, è un «antropocentrismo epistemologico» basato sul fatto che noi possiamo guardare al mondo solo attraverso la nostra esperienza, la nostra situazione sociale e culturale, attraverso il nostro sguardo possibilmente purificato dalla grazia o tanto più corretto quanto vissuto nella comunione con Dio e nella comprensione del suo piano di salvezza. Non abbiamo un'altra visuale. Il comando di «dominare e sottomettersi la terra» pertanto non dà via libera allo sfruttamento e alla distruzione, ma alla relazione con cui l'unico Signore (*Dominus*), di cui l'uomo e la donna sono immagine, si occupa di ogni singolo essere, ogni creatura. L'uomo è dunque chiamato a essere giardiniere, pastore, sacerdote del creato, colui che lo porta a Dio. L'usurpazione del potere ricevuto da Dio, pertanto, non provoca solo la distruzione della natura, ma anche la sua ribellione. Il cosmo non è passivo, non subisce supinamente la violenza e lo sfruttamento da parte dell'uomo, ma «risponde». Siamo sempre più testimoni e vittime di fenomeni climatici come tempeste, uragani, tornado, siccità... D'altro canto non condividiamo che tutte le creature abbiano lo stesso valore, perché solo l'uomo è stato creato ad immagine di Dio, solo lui chiamato a diventare figlio[22].

Oggi, senza sminuire la gravità della crisi ecologica alla quale il magistero pontificio ha dedicato vari interventi e interi documenti[23], potremmo considerare che non tutte le catastrofi ambientali di cui siamo testimoni sono conseguenza dell'agire umano. La vita sulla terra è segnata da sofferenza, dolore, estinzione, morte fin dall'inizio, e cioè da 3,7 miliardi di anni, mente l'uomo è apparso circa 200.000 anni fa. A chi attribuire quindi la responsabilità per la sofferenza, la corruzione e la morte, per un numero così elevato di vittime? A quel Dio che la Bibbia presenta come buono, generoso, amorevole verso ogni creatura? Sono domande scomode, almeno per quella teologia che crede di avere tutto sotto controllo, di intendere tutto, di possedere le risposte ascrivendo ogni sofferenza alla libertà creata. Sono questioni che oggi vengono affrontate da quella corrente teologica che viene definita *deep incarnation*.

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[22] Il documento della Commissione Teologica Internazionale «Comunione e servizio» (2004) dedica tutto un capitolo al posto dell'uomo nel creato (cfr. specialmente nn. 57–59), ma anche al posto del creato nel piano di Dio. «Nel disegno provvidenziale della creazione, il Dio uno e trino ha voluto non solo creare un posto per gli esseri umani nell'universo, ma anche, e in ultima analisi, riservare ad essi uno spazio nella sua stessa vita trinitaria». (n. 68) Dentro questo quadro la Commissione Teologica Internazionale apre la riflessione sulla connessione di tutte le creature e la responsabilità dell'uomo per la terra che i membri della stessa Commissione stanno investigando nel quinquennio in corso. Una spiegazione ancora più acuta e approfondita del posto della persona umana nell'universo secondo il piano di Dio emerge dal documento della Pontificia Commissione Biblica «Che cosa è l'uomo?» (2019).

[23] Giovanni Paolo II senza riserve dice che la crisi ecologica è conseguenza di un «errore antropologico». («Centesimus annus», n. 37) Anche Benedetto XVI, a più riprese, ha toccato la questione, parlando non solo del rapporto giusto con l'ambiente naturale, ma di una reciprocità del rapporto verso la natura e verso la sua stessa persona e quella del prossimo. («Caritas in veritate», n. 48) Papa Francesco a sua volta insistentemente illumina l'argomento della «ecologia integrale» e «conversione ecologica». Già in «Evangelii Gaudium» nn. 222–225 offre i principi con i quali considerare la questione, che viene sviluppata in «Laudato sì», «Querida Amazzonia» e «Laudate Deum».

Si tratta di una proposta per la prima volta espressa dal teologo luterano Niels Gregersen, il quale ha collegato la sofferenza del creato, la crudeltà dei processi evolutivi con l'incarnazione e la croce di Cristo. La morte fisica, biologica, in questa prospettiva, non può essere la conseguenza del peccato dell'uomo, perché esisteva già milioni di anni fa prima della comparsa dell'uomo. La morte è «uno dei modi con cui Dio crea qualcosa di nuovo nell'evoluzione» (Gregersen 2001, 198). L'autore si rende conto che questa visione non è affatto consolante per le creature che soffrono, per questo fa un altro passo teologico, cioè cristologico. Egli punta sulla teologia della croce, ribadendo che il vero carattere di Dio viene rivelato nella croce di Cristo. Se Egli è «l'Agnello immolato fin dalla fondazione del mondo» (Ap 13,8), allora l'auto-donazione di Dio, il suo amore kenotico caratterizzerà ogni sua azione, creazione inclusa. (Gregersen 2001, 203) Scrive l'autore:

> «In questo contesto, l'incarnazione di Dio in Cristo può essere compresa come una radicale o 'profonda' incarnazione, ovvero un'incarnazione nel tessuto biologico stesso dell'esistenza e nel sistema della natura. Compresa in questo senso, la morte di Cristo diviene un'icona della co-sofferenza redentrice di Dio con ogni forma di vita senziente così come con le vittime della competizione sociale. Dio patisce i costi dell'evoluzione, il prezzo incluso nel patimento della selezione naturale». (Gregersen 2001, 205)

In questo modo l'uomo nella sofferenza non è più solo, anzi possiamo fare un passo ulteriore. Se Gesù è fin dall'eternità la parte integrante dell'identità di Dio, Dio stesso è presente in mezzo alla sofferenza di tutte le creature, la sta trasformando, la redime. La redenzione delle creature non razionali non è certo consapevole, ma è reale perché Dio condivide le loro vite.

Nella teologia cattolica la proposta della *deep incarnation* viene seguita da Celia Dean-Drummond, biologa e teologa, che parte dalla teodrammatica di Hans Urs von Balthasar. Ella vede il carattere drammatico della croce coerente sia con il grande dramma del fenomeno evolutivo di cui parla la scienza sia con la visione teologica che presenta l'unione del Verbo con la condizione fragile, corruttibile e mortale della natura creata. Secondo la teologa britannica, il dramma della croce rivela il dramma dello svuotarsi del cuore del Padre nel generare il Figlio, un dramma che si perpetua nel dramma della creazione e redenzione (Dean-Drummond 2015, 200–201). L'altro noto rappresentante di questa corrente teologica fu Denis Edwards che, riflettendo sulle stesse domande di fondo, si rifece alla teologia di Ireneo, Atanasio e Karl Rahner[24].

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[24] Edwards è autore di diversi libri sull'argomento: *The God of Evolution: A Trinitarian Theology* (1999); *Jesus the Wisdom of God: An Ecological Theology* (2005); *Ecology at the Heart of Faith* (2006); *Partaking of God: Trinity, Evolution and Ecology* (2014); *Deep Incarnation: God's Redemptive Suffering with Creatures* (2019).

4. Conclusione

Siamo partiti da alcune grandi intuizioni antropologiche della Costituzione «Gaudium et spes» e abbiamo cercato di illuminare qualche sviluppo nella teologia post-conciliare senza pretesa di essere esaustivi. Gli autori che si sono occupati della teologia del Concilio tra novità, proposte, snodi teologici, liturgici, pastorali e altri, hanno osservato non di rado che la teologia ivi sviluppata è occidentale e solo occidentale: per un verso a causa dell'impossibilità di uno sviluppo indipendente delle teologie locali dovuta al regime rigido e obbligatorio di rimanere nei limiti delle categorie tomiste, per l'altro a causa delle scarse possibilità e risorse della ricerca su basi solide tanto umane, quanto materiali. Oggi si sente sempre di più la richiesta di dare voce alle teologie del cosiddetto «globo sud», perché come afferma la Commissione Teologica Internazionale nel documento «Teologia oggi» (2012):

> «La pienezza e la ricchezza di rivelazione sono troppo grandi per essere colte da una sola teologia e, poiché sono recepite in modi diversi dagli esseri umani, di fatto danno luogo a teologie molteplici. Nella sua diversità, tuttavia, la teologia è unita nel servizio all'unica verità di Dio. L'unità della teologia, quindi, non richiede uniformità, ma piuttosto un unico focalizzarsi sulla Parola di Dio e un'esplicazione delle sue innumerevoli ricchezze da parte di teologie in grado di parlare e comunicare tra loro». (n. 5)

Una sfida per niente facile, ma reale e attuale, una missione in un mondo sempre più globalizzato che impoverisce le coscienze e i cuori. Ma, se ci limitiamo all'antropologia, oggi dove si sente di più l'esigenza di ascolto e riflessione? Sicuramente è necessario da una parte il dialogo con la filosofia, ma anche con le religioni non-cristiane e la sapienza millenaria dei popoli della terra, dall'altra serve un dialogo coraggioso e proficuo con le scienze, soprattutto naturali, altrimenti la teologia sarà sempre più estranea alla vita della gente.

Oggi non meno che nel passato sono ancora aperte le domande sull'essere dell'uomo nella sua dimensione psico-fisica. Se nel XX secolo fu attuale il problema del rapporto tra mente e cervello, l'intelligenza artificiale oggi sposta l'attenzione sul rapporto tra mente, una categoria centrale che definisce l'umano fin dagli albori del pensiero filosofico, e macchine che possono essere capaci «di produrre risposte appropriate, cioè quelle che vengono associate all'intelletto umano, a prescindere dalla modalità con cui tali risposte vengono generate», ma escludono le emozioni, la creatività, il senso estetico, morale e religioso. («Antiqua et nova», n. 4)

E non solo. Siamo anche testimoni dell'incapacità di accettare la fragilità umana e quindi della volontà di rendere l'uomo immortale con l'aiuto della tecnica e della tecnologia, che pongono una serie di interrogativi sull'identità del corpo e della persona umana e sul suo vero valore, che utopicamente vuole essere legato a questa terra e a questa vita fisica, nonostante la scienza oggi affermi chiaramente l'inevitabilità della fine del pianeta Terra e del nostro cosmo, proponendo vari scenari non necessariamente dipendenti dalla crisi ecologica. La scienza dice chia-

ramente che il cosmo attuale non può rimanere in eterno, non ne è predisposto, tanto meno l'uomo, questa canna, la più fragile tra tutte (Pascal 2021, 347).

Il cristianesimo, appoggiandosi da una parte al concetto di uomo, ne ha sempre sostenuto la superiorità rispetto al mondo materiale, meccanico, dal momento che come essere trascendente sta dalla parte di Dio ed è per questo capace dei rapporti personali. Dall'altra ha insistito che ogni creatura, le persone e ogni realtà mondana hanno un inizio e una fine. Tutti e due sono misteriosi, ma non terrificanti, rivolti contro l'uomo, perché il punto di partenza e il punto di arrivo, come pure tutto ciò che è in mezzo, sono di Dio, che in Gesù Cristo, Alfa ed Omega, si è rivelato come Amore. La teologia è chiamata ad esplorare Dio Amore e alla sua luce la vocazione dell'uomo, Sua immagine, che è irrevocabile: Dio ha voluto assumere l'uomo nella vita trinitaria in Cristo e continua a fare tutto per realizzare questo suo piano inaudibile, nonostante le prognosi di autodistruzione dell'uomo e le scelte drammatiche di singoli e gruppi che ne sembrano compromettere la realizzazione. Il Padre ci raccoglierà nel Figlio in forza dello Spirito Santo, perché ci ha creati in Lui e per Lui, per la vita senza fine. Nel suo piano c'è spazio per tutti e tutto, di ogni tempo e di ogni luogo, per tutti i tratti individuali e culturali. In esso c'è misteriosamente spazio anche per il nostro distacco dall'Amore, ma pure la Via per superarlo. La teologia non potrà mai dire tutto su questa predestinazione meravigliosa. In ogni tempo, fino all'ultimo giorno, dovrà essere in ascolto della Parola che Dio pronuncia, offrire le ragioni della gioia e della speranza finché il cammino dell'umanità non raggiunga il compimento. In ogni tempo dovrà trovare l'ermeneutica capace di spiegare ai contemporanei il mistero di Dio di cui tutti facciamo parte. Oggi, senz'altro, è molto eloquente il fatto che ci scopriamo sempre più legati gli uni agli altri: «Tutto è connesso». («Laudato sì», 138) Si tratta di una verità fondata nel mistero di Dio e oggi resa manifesta sia per la tecnologia sia per i fenomeni come la recente pandemia. La teologia è chiamata a spiegare questa relazionalità fondamentale non come un dato sociologico o naturale, ma nella sua pregnanza teo-*logica*, come fonte di speranza, come grazia che ci custodisce e interpella e attende la risposta libera e grata.

Abreviazioni

GS – Concilio Vaticano II 1965 [Gaudium et spes].
DH – Denzinger e Hünermann 2010.

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The Church's Relationship with Modern Democracy and Religious Pluralism According to the Document of the International Theological Commission "Religious Freedom for the Good of All": A Theological Analysis and Foundation of the Document

Odnos Cerkve do sodobne demokracije in verskega pluralizma v skladu z dokumentom Mednarodne teološke komisije „Verska svoboda za dobro vseh": teološka analiza in temelji dokumenta

Abstract: This paper explores how contemporary Catholic theology, in reflecting on the relationship between the Church and politics, especially modern democracy, has remained faithful to the openness of the Council and Catholic doctrine towards the world and positive yet specific collaboration with state and political structures. It also examines whether new impulses and directives for the otherwise complex relationship between faith and politics emerge from it, given the changed circumstances of the modern world, especially the emphasis on contemporary democracy and increasingly prominent religious pluralism. For this purpose, the paper deals with the theological analysis of the document of the International Theological Commission, "Religious Freedom for the Good of All: Theological Approaches and Contemporary Challenges", which presents critical reflections on the relationship between the Church and politics, especially democracy, in the modern world. After a detailed presentation of the content of this document in the first part, the second part provides a theological analysis, pointing out the main theological principles for defining the relationship between the Church and politics, specifically the Church and contemporary democracy, according to this document. From this, some conclusions are drawn regarding the fruitful and socially relevant life of Christians in the modern world, especially within democratic systems, as suggested by contemporary theology.

Keywords: democracy, religious pluralism, religious freedom, International Theological Commission

Povzetek: Prispevek raziskuje, kako je sodobna katoliška teologija pri razmišljanju o odnosu med Cerkvijo in politiko – zlasti v sodobni demokraciji – ostala zvesta odprtosti koncila in katoliškega nauka do sveta ter obenem pozitivnemu, a specifičnemu sodelovanju z državnimi in političnimi strukturami. Proučuje tudi, ali iz tega izhajajo nove spodbude in smernice za sicer (glede na spremenjene razmere v sodobnem svetu zlasti ob poudarku na sodobni demokraciji in vse bolj izrazitem verskem pluralizmu) zapleten odnos med vero in politiko. V ta namen je v prispevku teološko analiziran dokument Mednarodne teološke komisije „Verska svoboda za dobro vseh: teološki pristopi in sodobni izzivi",ki prinaša kritične razmisleke o odnosu med Cerkvijo in politiko – zlasti demokracijo – v sodobnem svetu. Po podrobni predstavitvi vsebine tega dokumenta v prvem delu prispevka teološka analiza v drugem delu izpostavlja glavna teološka načela za opredelitev odnosa med Cerkvijo in politiko – zlasti Cerkvijo in sodobno demokracijo – v skladu s tem dokumentom. Iz tega izhajajo nekateri zaključki o plodnem in družbeno relevantnem življenju kristjanov v sodobnem svetu (zlasti v demokratičnih sistemih), ki jih ponuja sodobna teologija.

Ključne besede: demokracija, verski pluralizem, verska svoboda, Mednarodna teološka komisija

1. Introduction

At the Second Vatican Council, the Church strongly advocated for an open approach to the world and for cooperation with all societal actors committed to affirming human dignity and the value of the human person. In this context, the importance and necessity of dialogue between faith and politics – specifically, between the Church and various states and social systems – was affirmed. Approximately half a century later, the world is marked by significantly altered social and political circumstances, including the growing prominence of liberal and democratic political cultures, particularly characterized by pluralism and secularism. This raises the question of whether the Council's approach to the relationship between the Church and contemporary political systems has been sustained or whether new pathways are being explored to achieve its fundamental goals.

Since theology, particularly the fruitful and open collaboration between theology and the magisterium, played a pivotal role in the Second Vatican Council's reflections and the adoption of its significant and far-reaching decisions, this paper, in examining the modern relationship between the Church and politics, primarily turns to contemporary Catholic theology and its reflections on this subject. This approach presupposes theology's ongoing importance both in shaping internal Church positions and in guiding the Church's direct engagement with politics.

The study focuses on a highly significant document from the International Theological Commission, "Religious Freedom for the Good of All: Theological Approaches and Contemporary Challenges". The document affirms contemporary de-

mocracy as a guiding principle but offers critical reflections on pluralism and secularism. Moreover, it provides key directives for the stronger promotion of human rights and the common good within democratic political systems. The aim of this paper is to elucidate the theological underpinnings of the document and the foundations of its content. Additionally, it seeks to evaluate the extent to which contemporary Catholic theology, in its exploration of the relationship between the Church and politics, has remained faithful to the Council's guidelines. Finally, the paper examines the new insights and directives that this document proposes, rooted in theological principles, for addressing the complex interplay between faith and politics amid the changed circumstances of the modern world.

In the first part of this paper, it is very important to present the aforementioned document in detail and critically, and in the second part, a theological analysis follows that explores the validity of the document's foundation in the theological doctrine of the Church. This foundation is sought in the revelation and Christian doctrine, from which certain concrete conclusions can be drawn for a fruitful and socially relevant life for Christians in the modern world. At the very beginning of the paper, as an introduction to the topic, the main characteristics of democracy as a political system are briefly outlined, and the question of the Church's reasonable sensitivity to its development and advancement is raised.

2. Democracy – The Modern Ideal of Political Order

The very etymology of the word (Greek δημοκρατία) clearly defines democracy as the power of the people. The archetype of democracy as a form of social governance is considered to be ancient Greece, particularly Athens. However, democracy in the sense of the rule of the people became a programmatic political concept only in the 18th and 19th centuries. Today, the demand for democracy as a legitimate form of governance is widely accepted, and it is generally regarded as the ideal political system for communal life (Letto-Vanamo 2008, 649). The understanding of democracy in a given society depends on the fundamental social contract agreed upon by the majority, and on the interpretation of basic human freedoms that arise from that contract. Starting from the fundamental understanding of freedom as individual freedom, and accordingly, understanding the fundamental social contract as one that should protect the individual, democracy is understood as the rule of the majority within the framework of the rule of law that protects the rights of minorities and individuals. This distinguishes it from autocratic forms of governance, such as oligarchy and monarchy.

Democracy, therefore, is based on the principle that the sovereignty of governance belongs to the people, meaning that the people are the bearers of state power. In modern times, we can speak of plebiscitary or direct democracy, where the people directly decide on matters of communal life through referendums, and of intermediary or representative democracy, where elections determine who will hold direct power for a certain period. The fundamental distinctions within de-

mocratic systems are shaped by the different historical developments of certain societies and peoples, differing understandings of the human person and their defining characteristics, as well as diverse social and economic theories. Today, we speak of two main forms of democracy: liberal democracy and social democracy.

Although there are significant differences between them, both forms should, at their core, be founded on two principles: on the one hand, human freedom as a natural and inalienable right of the individual, aimed at organizing communal life in a way that preserves and supports this freedom, and on the other hand, the achievement of the common good for all people. When these values are distorted into extreme forms, we can speak of autonomy and individualism, which lean toward insensitivity to the social dimension, to others and to those who are different, and, on the other hand, of the emphasis on collectivism, which is susceptible to ideologies and leads to totalitarianism. Balancing these extremes or ensuring the rights of both the individual and the community is the task of the democratic state and its laws. These are also the conditions for internal and external peace and justice, essential for a tranquil life, which are likewise the concern of every state and its politics.

The Catholic Church has always been concerned with rights related to human dignity, human rights, and freedoms, particularly the freedom of conscience and freedom of religion. The Church clearly articulated its positions during the Second Vatican Council, especially in the Pastoral Constitution on the Church in the Modern World "Gaudium et Spes" (GS) and the Declaration on Religious Freedom "Dignitatis Humanae" (DH). From these documents, it is evident that the Church, although it does not explicitly mention political systems, values democracy as a kind of Christian virtue (even though Western liberal democracy cannot be directly derived from Christian roots). The Church has viewed democracy positively, as this form of governance has proven to offer the best possibilities for achieving a balance between protecting general justice and ensuring social protection for citizens. However, this does not mean that democracy is a perfect form of social organization. For democracy to function fully, it requires certain prerequisites: it demands active and free participation of citizens in political decision-making processes, as well as constant oversight of the government, and the free expression of opinions and positions on various matters of general importance.

Since a perfect form of social relations cannot be achieved, the Church and its theology remain vigilant regarding the realization of the proposed harmony, even when it comes to societies of established democracies or those that merely declare themselves as such. This vigilance and attentiveness of the Church is also evident in the document of the International Theological Commission (CTI)[1] on religious freedom.

[1] The official name of the commission is "Commissio Theologica Internationalis".

3. Origin and Content of the Document "Religious Freedom for the Good of All"

The CTI chose to address this topic, choosing it from among five proposed topics presented by Gerhard L. Müller, then Prefect of the Congregation for the Doctrine of the Faith. The members of the subcommission working on the drafting of the document were: J. Prades López, S.-Th. Bonino, K. Messan, L. Kpogo, M. M.McQueen, J. J. Park, B. Pottier, T. Rowland, P. Sequeri, Ž. Tanjić, and Ph. Vallin. The topic was discussed from 2014 to 2018, and the document was accepted by an absolute majority of all members. The then-president of the CTI, Cardinal L. F. Ladaria, after receiving a positive opinion from Pope Francis, approved the document and allowed its publication on March 21, 2019. The official text was published on the CTI website in Italian under the title "La libertà religiosa per il bene di tutti"[2].

The document primarily addresses the issue of religious freedom as one of the fundamental human rights and highlights the importance of its protection in the modern world. Theologians analyze the theological, ethical, and philosophical aspects of religious freedom and call for dialogue between religions and cultures in order to make progress in realizing religious freedom. In advocating for this, they also touch upon certain principles related to political and social systems, particularly those of modern democracy.

3.1 The Council as a Starting Point for Reflection

As the starting point for reflection in the first chapter, which is essentially a view of the current context, the conciliar "Declaration on Religious Freedom" (DH) is taken, with its position on religious freedom as an inalienable right of the individual, rooted in the dignity of the human person (DH, 2). The definition of the dignity of the human person is provided at the beginning of the most recent document by Pope Francis, "Dignitas Infinita": "Every human person possesses an infinite dignity, inalienably grounded in his or her very being, which prevails in and beyond every circumstance, state, or situation the person may ever encounter. This principle, which is fully recognizable even by reason alone, underlies the primacy of the human person and the protection of human rights." (Pope Francis 2024, no. 1).

The CTI document greatly values the Council's contribution to the understanding of the human person and their inalienable worth, calling this discourse prophetic. Also, it acknowledges the greatly changed social and political circumstances of the contemporary world. It holds that, in the new circumstances associated with a liberal, democratic, pluralistic, and secular political culture, the concept of human rights and civil liberties must be redefined. In doing so, it emphasizes that the humanistic values of coexistence, individual dignity, and dialogue are rooted in Christian principles that contributed to their formation (no. 1–3).

[2] For the purposes of this paper, in addition to the original Italian text, we also use the German translation, published in the collection of all documents issued by the CTI to date. (Hallensleben 2022, 822–868) Numbers in parentheses within this paper refer to the paragraph numbers as listed in the official document.

Theologians are concerned on one hand by fundamentalism and the radicalization of religions, with their specific reactions to the liberal conception of the modern state, and on the other by the alleged ideological neutrality of contemporary political culture, which seeks to avoid any ethical and religious inspiration, imposing their exclusion from the public sphere and participation in the shaping of democratic society (no. 4–5). The CTI calls on civil society to overcome prejudices stemming from an ideological view of religion, and it urges religions to express their vision of reality and coexistence, which inspires them, in a language understandable to humanistic reason (no. 7).

It positively assessed the Christian rejection of exploiting political power, as is the focus of evangelization on the positive valorization of the context of religious and civil freedom of conscience. The proclamation of universal freedom and the universality of transcendent truth belongs to the nature of faith; therefore, Christianity is open to any search for truth and goodness that the history of culture develops in the life of peoples (no. 8). Thus, in the political and social life of nations, the deep connection between religious life and humanistic culture is recognized, and it is necessary to freely seek the most appropriate forms of their interaction (no. 9). In light of the signs of the times, the CTI recognizes the need to seek means and ways to deepen the current understanding of Christian thought, interreligious dialogue, and engagement with all forces of civil society. This is important both for state policies and for the Church. The inseparability of religious freedom and human dignity thus becomes the criterion for every just policy. Likewise, the Church, as a community of believers living in multi-religious and multi-ethnic societies, must safeguard the freedom of every individual for its own sake and due to the nature of faith. It must also be able to proclaim the faith under radically changed global conditions (no. 10). The document is therefore a theological-hermeneutical reflection that seeks to renew attention to the reception of the DH declaration and present reasons for the anthropological and political integration of the personal and social demands of religious freedom (no. 12).

The second chapter summarizes the main emphases of the Declaration "Dignitatis Humanae" (DH). Since DH is, in some way, the result of a maturing process related to the Church's essence and its legally shaped relationship with the state, the CTI document first provides a brief overview and reflection on relevant Church teaching before the Council (no. 14–16), recognizing that the Church emphasized the importance of human dignity even before the Council. And at the Council itself, aside from the Dignitatis Humanae Declaration, this theme was also touched upon in the context of reflections on human freedom in the Pastoral Constitution "Gaudium et Spes", especially in no. 26, but also in no. 11–22. The document then outlines the central statements of the conciliar declaration (no. 17–21). The declaration begins with a statement on the right of every human person to religious freedom. "This right of the human person to religious freedom should be recognized in the legal order of society in such a way that it becomes a civil right." (DH, 2) The declaration then provides arguments for the claim that religious freedom is founded on the dignity of the human person, explaining their acceptance in the

light of divine revelation and their reception within the Church. It further examines the post-conciliar reception of the guidelines of the declaration (no. 22–26). It is noted that the principle of religious freedom is now indisputably defined in the modern world as a right of citizens and groups. However, there are still aspects that require further development and maturation, particularly concerning new threats to religious freedom that are taking on global proportions. Thus, the issue of religious freedom raises anthropological, political, and theological questions that are crucial for the common good and peace among nations, making it a foundation and source of political and social order in society. (no. 23–26)[3] It is emphasized that religious freedom is a fundamental right that every individual has the right to demand from the state, invoking their conscience and responsibility (no. 27–28).

3.2 Christian Anthropology and Fundamental Human Rights

The third chapter begins with Christian anthropology, which describes the human being as a relational being. From a Christian perspective, personality is always seen in conjunction with relationality as a fundamental characteristic of a spiritualized human being. Therefore, the dialogue surrounding the search for truth and the desire for communion is a responsibility of all in the process of realizing the rights of the human being, defined in this way (no. 29–30).

Fundamental human rights are grounded in the dignity of the human person, and among these is the right to religious freedom. The CTI advocates that there must be a general consensus on the criteria for realizing this right. Here, reference is made to the concept of the person as defined within the Christian theological tradition, which encompasses two aspects: one that points to the uniqueness of the person as a subject, and another that defines the person through their capacity to form relationships with others and be defined by those relationships. (no. 31–36). Through a summary of conciliar anthropology, the CTI once again illuminates the Christian criteria for recognizing the dignity of personality in every human being. Such human dignity is the foundation for building every human community (no. 37–39). This truth is communicated to the individual through the moral imperative of their conscience, on which the CTI here presents a concise Christian reflection. The right of a person to act in accordance with their conscience is then connected to human freedom. This freedom is integral to the definition and realization of personal human dignity. In line with this, the Church's teaching has always emphasized that freedom, grounded in the dignity of the human

[3] As an example of post-conciliar papal commitment to this topic, we cite the words of Pope John Paul II, who, in 1979 during the Third Latin American Episcopal Conference in Puebla, stated that human dignity represents a Gospel value that cannot be disregarded without gravely offending the Creator. This dignity is violated on an individual level when values such as freedom, the right to practice one's faith, physical and psychological integrity, the right to basic goods, and the right to life are not respected. It is also violated on a social and political level when individuals are unable to exercise their right to participation or are subjected to unjust and unlawful coercion or to physical or psychological torture… (III.1–2) When the Church is present in the defense or promotion of human dignity, it does so in accordance with its mission, which, while religious in nature and not social or political, cannot fail to consider the human person as a whole (II/1). (John Paul II., 1979)

person, is the foundation and source of all political and social order. This is an absolute and fundamental principle, in harmony with the principle recognized as a universal tenet of modern philosophy and politics: the human person must never be treated as a means, but always as an end (no. 40–42).

Following the emphasis on the right to religious freedom for every person, Chapter 4 elaborates on how this right also pertains to communities. Once again, the starting point is Christian anthropology and tradition, according to which the right to freedom, connected to the dignity of the human person, is realized in responsibility for the common good. In this sense, communities such as family, nation, and religion in some way precede the individual. In the context of the importance of community for the individual, the role of the state is also considered in terms of cultivating the private and subjective sphere. Its role is to ensure that existing differences are lived in a way that serves the common good (no. 43–44). In modern times, a profound crisis of institutions is evident, one that primarily affects the family and its humanizing role. The significant role of the state in safeguarding the family is emphasized. Religious communities are those that safeguard questions concerning the meaning of life, highlight the ethical and moral transcendence of the human person, protect individuals from nihilistic reduction to mere will and power, and guide them toward love as the pinnacle of human development (no. 45–46). The promise of salvation gives meaning to human life and prevents its reduction to individual and material needs. This is the broader social significance of religious communities. Belonging to such communities proves to be important for individuals and is, in fact, an essential part of their faith convictions. The safeguarded freedom of religion, a fundamental human right, cannot, therefore, be understood in an individualistic sense but as a freedom that flourishes through belonging to a community of believers. The state must adequately safeguard and guarantee this right. (no. 47–51)

Reflections on the social significance of freedom are further developed through considerations of the inclusion of social entities active in specific areas of civil society, which serve a mediating role between individual rights and state interests. In this context, the Catholic Church is highlighted for its contribution to the culture and ethics of public life, as well as its importance for the common good and the advancement of political humanism. In its governing function, the Church is not regarded as a competitor to the state. Once any possibility of reverting to theocratic symbiosis between Church and state is excluded, the CTI envisions the Church's role in implementing religious freedom and engaging in public life (no. 52–53).

3.3 Religious Freedom as a Theme for Re-examining Church-State Relations

Chapter 5 explores the relationship between the state and religious freedom. Reflections on the relationship between Christianity and the state begin with the Old Testament Revelation, emphasizing that even in the Old Testament, obedience to God did not preclude obedience to legitimate earthly rulers. While political

institutions in all early cultures were rooted in theologically based culture, for the biblical people of God, obedience to God's commandments followed the logic of the Covenant. This logic presupposed individual freedom and emphasized that faithfulness to the Covenant and the Law, arising from this freedom, was continually reaffirmed by the promise that observing God's commandments would ensure the well-being of the entire nation. Throughout Old Testament history, a clear distinction was maintained between political power and religious institutions. Nevertheless, political rulers were obligated to align public life with fidelity to God and His commandments, particularly in practicing justice. The prophets condemned social injustice, political corruption, violence, and economic exploitation as betrayals of the Covenant with God. Thus, the reason attributed to political justice was understood as an integral aspect of divine law (no. 55–56).

This prophetic critique was adopted by Jesus from the very beginning of His proclamation, indirectly through His parables and directly through His condemnation of contemporary legalism. His proclamation presupposed a distinction between politics and religion. Similarly, the early Church did not question the fundamental legitimacy of political power nor its distinction from religious authorities. Power that served the people was understood as instituted by God; moreover, those who held political power and worked to establish a just order were viewed as instruments of God's care for His people. However, it was clearly emphasized that the Kingdom of God, which was inaugurated with Jesus, is "not of this world" (Jn 18:36), and that the logic of church leaders differs from that of political rulers, who "Lord it over the nations" (Lk 22:25). Political power is respected provided that political authority does not usurp the place that belongs to God alone. For Christians, it is indisputable that the highest obedience belongs to God alone (Acts 5:29). This obedience, realized in freedom, is an expression of the freedom of faith (1 Pt 3:14-17). It neither interferes with individual freedom nor threatens the public order of any community (2:16-17) (no. 57–58).

During the Roman Empire, Christians often bore witness to this stance of resistance to the imperial cults. The Gospels associate the exercise of civil authority with the obligation to do good for the benefit of the community, opposing any politics that seeks to replace faith. Under Emperor Theodosius (4th century), state laws regarding Christianity and religious freedom changed, resulting in a shift in the relationship between Church and State. This change led to the justification of the so-called *Christian state*, which discouraged religious pluralism, marking a significant departure from the previous paradigm.

Even after this shift, Christianity continued to strive to maintain the separation of political power from the spiritual authority of the Church. However, there remained a persistent danger: on one hand, the theocratic temptation to derive the legitimacy of secular authority from religious authority, leading to the exercise of political power in accordance with religious directives; on the other hand, the temptation for secular authority to subjugate the Church, reducing it to merely an organ or function of the state. Over the subsequent centuries from – the 5th to the 19th – efforts were made to establish a proper relationship between Church

and State. The prevailing view was that spiritual authority should be regarded as superior to political power, although there was also a concerted effort to establish a harmonious order between the two.

Finally, the Second Vatican Council put forth a proposal that preserves the autonomy of both the Church and the State, while clearly affirming their mutual interdependence. In line with the Constitution "Gaudium et Spes", which advocates for the autonomy of both the Church and the State alongside their interdependence (GS, 76), CTI emphasizes the importance of maintaining a clear distinction between the two and safeguarding their respective identities. In addition to the conciliar text of GS, the CTI also refers to a clarification issued by the Congregation for the Doctrine of the Faith on November 24, 2002, in the document "Doctrinal Note on Some Questions Regarding the Participation of Catholics in Political Life", no. 6. This document reiterates the independence of the civic and political spheres from the religious and ecclesial domains, while acknowledging their mutual orientation toward one another. According to this arrangement, no state should impose specific religious beliefs or practices on its citizens, nor should it implement policies that substitute for faith and religion. Likewise, the Church is prohibited from intervening in political matters or decisions. However, the Church retains both the right and the duty to engage in public discourse and to express its stance on societal issues. Thus, Church and State should cooperate in serving the community, promote religious freedom as a universal good for society, uphold all human rights, and remain open to dialogue and collaboration (no. 59–60).

Religious life unfolds within the entirety of human life and is not separate from it. The Church's social doctrine encourages a commitment to the common good within the secular realities of life, avoiding any suggestion of opposition between secular and spiritual spheres. The CTI underscores that the foundation of all authority is in God; therefore, authority must be measured against the standards of God's justice. However, maintaining social and political order remains a human responsibility, and the CTI points to the precise boundary between the governance of earthly powers and the ultimate dependence on divine judgment. In this regard, both a theocratic and an atheistic state can be seen as fundamentally similar, as both replace God with ideology. The CTI draws an analogy between these extremes and the Christological heresy of Monophysitism, which erases the distinction between divine and human natures, united in the Incarnation yet harmoniously distinct. It is noted that this temptation toward *political Monophysitism*, a phenomenon known from Christian history, currently appears more often within certain radical movements of non-Christian religions (no. 61).

The CTI notes that such an *ethically neutral* state, which renounces ethical values under the pretext of neutrality, elevates itself to the position of a controlling authority and thus effectively becomes an *ethically authoritarian* state. By appealing to ideological neutrality, it imposes censorship on ethical judgments, thereby restricting freedom of conscience rather than protecting it. In the name of this so-called *state ethics,* the freedom of religious communities to organize according to their own principles is sometimes unjustly called into question (no. 62). More-

over, the CTI observes the danger of a certain indifference on the part of the state toward various approaches to shaping ethics and culture, or even an outright equalization of them. Invoking ideological neutrality often imposes censorship on ethical judgments, thereby restricting freedom of conscience rather than protecting it. Under the rubric of such a *state ethics* the freedom of religious communities to organize according to their own principles is sometimes unjustifiably questioned (no. 62).

It is noted that the moral neutrality of the state stems from varying conceptions of the modern liberal state. According to one such view, freedom can be politically guaranteed even without committing to a predefined concept of the good. State neutrality, in such cases, extends beyond guaranteeing equality before the law and excludes certain definitions of the good. This creates a secularist version of theocracy, as the state assumes the authority to determine what is deemed correct conduct and what is labelled heretical freedom. In this way, absolutism and ethical relativism are revealed as two sides of the same coin (no. 63). Unmasking this pretense of neutrality toward ethical values as an ostensible differentiation between communities fostering true freedom and those perceived as potentially harmful to social cohesion and the common good, the CTI highlights the illusion and ambivalence of morally neutral states. It calls attention to moral conscience, which is fundamentally oriented toward truth and the moral good. A conscience that recognizes its orientation toward the good as rooted in God simultaneously acknowledges an authority that precludes the instrumentalization of individuals by others. Where God is replaced by idols, the result is not the liberation of the individual but their enslavement. States claiming ethical neutrality enable the substitution of God with absolutist ideologies. (no. 64) This issue becomes especially significant for Christians when they are positioned as members of such allegedly neutral societies, experiencing their belonging to family and Church relegated to the private sphere while being expected to act as religiously and morally indifferent citizens in public. Acceptance of this division amounts to renouncing the right to religious freedom and freedom of thought. The CTI warns that Christians must never contribute to policies that, under the pretext of state neutrality or social pluralism, exhibit indifference to ethical norms. (no. 65)

The sixth chapter addresses religious freedom as a significant contribution to communal life and social harmony. It reflects on various aspects of religious freedom concerning its personal and social character. Practical issues regarding religious freedom in civil society are examined, emphasizing that this freedom must be regulated and protected by its institutions. The CTI warns that not all expressions of religious life can be valued equally. They must be assessed based on the extent to which they convey meaning and support to society as a whole and how much they contribute to the preservation of the common good as the supreme good. In this context, conflicts that disrupt peace and harmony in communal life are mentioned with concern, particularly the migration crisis caused by political conflicts and economic uncertainties. In an age of globalization, mutual responsibility transcends social differences and borders, as the problems affecting all can

only be solved collectively. Communal life is a dynamic reality, evolving and requiring political safeguarding. It is recognized that harmonizing the different dimensions of communal life is most successful when individuals live their faith and ethical convictions in a way that serves both their conscience and the common good. Religious communities should not operate as secret societies but must remain open. This openness is linked to the ongoing effort to enhance dialogue between religions and civil society, as it is in the interest of both parties to protect society from both indifference and radical relativism (no. 66–69).

It follows, therefore, that various forms of religious life must be critically examined based on their capacity to support the broader society and contribute to the preservation of the common good. Every religion must be able to responsibly meet the just and dignified demands of reason, while political authority must protect its citizens, especially the most vulnerable, from sectarian practices that exploit individuals under the guise of faith. Among the just demands of reason, the CTI recognizes the political and legal assurance of peaceful coexistence and mutual recognition of equal rights among different religions. This includes the right to freely leave a religious community and join another. Religious freedom should not be used to incite violence or discrimination against members of other faiths. Particular emphasis is placed on the need to protect minority religious communities. The reciprocity of rights means that the right to freedom of faith granted to a minority religious identity corresponds to the symmetrical recognition of the same rights for religious minorities in regions where that identity is predominant. Thus, the principle of *cuius regio, eius religio*, which served to halt religious wars during a certain period of European history, is transcended and replaced with a new principle that underscores the freedom of the individual and their conscience (no. 70).

The CTI observes that in many countries, religious freedoms are either completely suppressed or significantly restricted, making it impossible to speak of genuine freedom of faith, even in some nations that publicly declare themselves to be democratic. The limitation of religious freedom encompasses both the discrimination of individuals and the hindrance of Christian activities, so that it is difficult to claim true religious freedom if it does not include both an internal and an external dimension of life. The Church expects each state to protect the religious rights of its members, provided that these rights are in accordance with the rights of all other individuals. Situations are also foreseen where an individual, in order to remain faithful to their conscience, must oppose the laws of the state. Conscience is not bound by laws that are in contradiction to natural ethics, and the state must recognize the right of everyone to conscientious objection. (no. 71–72)

3.4 The Building and Safeguarding of Religious Freedom in the Mission of the Church

In the seventh chapter, religious freedom, particularly the freedom of conscience, is presented as a central mission of the Church. This encompasses a commitment to a humanitarianism of mercy and a responsibility in educating future generations. The Church's connection with people in all their life circumstances is

emphasized, especially its dedication to the poor and the persecuted. The Church must avoid the temptation of compromising with the powerful to secure privileges solely for its own members. It must advocate for the religious freedom of all and for universal justice (no. 73–76). Interreligious dialogue is essential, as is the joint pursuit of the optimal shaping of the common good. Such dialogue does not compete with the Church's mission nor serves as an alternative to it. Therefore, the Church is ready for constructive dialogue with all who advocate for justice and brotherhood (no. 77–78).

This requires the courage of discernment. By respecting the religious freedom of all, Christians accept the theme of civil tolerance, while ensuring that it does not devolve into indifference toward their own faith. Faith must never become a threat to the religious freedom of others or lead to violence in the name of God. The CTI calls upon Christians to irrevocably renounce the ambiguity of religious violence and believes it is time for all religions to reflect anew on this theme. The quest for the full acceptance of the truth of one's faith and respect for others can also lead to a critical examination of one's own faith, which opens delicate issues of balance in the application of religious freedoms both before society and the religious community. Such issues demand personal maturity and a shared wisdom that is a gift from God Himself, and at times, martyrdom can be the ultimate expression of the Christian response to violence. Martyrdom replaces the spirit of vengeance and violence with forgiveness and love. (no. 79–82)

Finally, the conclusion of the document reiterates the Christian teaching that God's love is directed toward all people and the entire world, which corresponds to the mission of the Church focused on the logic of grace and freedom. In the pluralism of different traditions, institutions, and rights, the Church commits itself to serving the personal freedom of each individual and the common good of all, without undermining its fidelity to the event of salvation, which remains the central theme of the proclamation of faith. In this mission, it must maintain a lasting distance from the spirit of domination and attachment to power. Only from such a pure position may it admonish states to define a more coherent policy.

The document clearly identifies the contemporary temptation of mutual exploitation of political power and evangelical mission, which Jesus Himself rejected as a demonic seduction, and He warned His disciples about the danger of conforming to the criteria and style of earthly rulers (Mt 20:25; Mk 10:42; Lk 22:25). Such clarity demands full recognition of the dignity of confessing faith in the public sphere. Alongside all others, Christians are called to active cultural and social engagement in the service of the common good. For this reason, the state must not exclude the freedom to profess one's faith in the pursuit of the common good. It should not be indifferent to religious culture and religious affiliation, but should implement *positive secularism* toward social and cultural groups that ensure the rule of law in relation to the community to which that right belongs.

By defending the freedom of faith, Christianity lives the eschatological hope in the afterlife for all, as God has promised (Rev 21:1-8) and which is a gift of God's

love. The goal of humanity is realized in redemption, which transcends and fulfils all earthly things. Therefore, it is crucial for Christianity to exclude the folly of any kind of worldly messianism, as the absolutization of earthly power leads to the enslavement of nations and ultimately the destruction of the common home. Finally, at the end of the document, faith is expressed that we will all be judged according to our responsibilities, which encompass care for all of creation, entrusted to humanity from the beginning (Gen 1:27-28) and love for one's neighbor (Mt 22:39), which seals the evangelical truth of God's love.

4. Theological foundation for the document "Religious Freedom for the Good of All"

It is clear from the presented document that the Church's theological stance toward any form of state policy, including modern democracy, is rooted in Christian doctrine about God, Christian anthropology, and, more specifically, Catholic ecclesiology.

What was already novel in the conciliar declaration DH is the fact that religious freedom is primarily grounded in the dignity of the human person, rather than, as before, in any primacy of truth. This stance is likewise emphasized in the CTI document, which upholds religious freedom as a right founded on dignity as the unconditional defining trait of every human being. Following this theological emphasis on the dignity of each individual, the call for the protection of religious freedom is not, and cannot be, a call for safeguarding an established state religion, nor exclusively for defending the freedom of the Church as an institution, but rather for securing the personal religious freedom of each individual. This theological position on the need to uphold religious freedom and freedom of conscience is thus extended unconditionally to all people and all religions. The absolutization of a *right to truth*, seen in earlier periods of Church history, sometimes led to an ideological stance within Catholicism, resulting in the political instrumentalization of the Church and the temptation to advocate for a confessional state, whose legitimacy was affirmed and derived from religious authority. This kind of state, at times, was subject to the directives of the Church hierarchy or, conversely, exploited the Church for its own ends. Such practices misused the Christian faith for religious-political ideologies, significantly harming the Church's true authority and mission.

The prominent Croatian sociologist of religion, Ž. Mardešić notes that, for example, in countries that have emerged from political systems in which religion was banned or repressed into privacy (examples are countries that have emerged from the communist system), Christians sometimes show tendencies towards fundamentalism and the fight against secularity. Religion is identified with a set of moral, social and political values that make up the identity of believers, and then such a system of values is tried (sometimes even combatively) to expand to national identity, society and political community. This leads to the equating of religious

identity with national identity and an increasing need for the political and social power of the Church, which is, of course, pure ideology and draws post-conciliar Christianity into heresy, such as the attempt of medieval theocracy (Mardešić 2007, 861–863). Conciliar and post-conciliar theology makes a notable shift from justifying a *Christian state* in the manner upheld in certain past eras and, by returning to the fundamental teachings of the Christian faith, takes a step toward modern democracy and religious pluralism.

The theological foundation of every person's dignity is rooted in Divine Revelation, specifically in the revelation that humankind is created in the image of God (Gen 1:26-27). This image signifies the boundless love of the Creator Himself. God is love (1 Jn 4:8, 16; CCC, 218–221), and from His being as love flows His creative act, which is itself an act of love. "For God has no other reason for creating than His love and goodness" (CCC, 293). Humanity is created as the pinnacle of creation, "in His own image" (CCC, 355). Since humanity is thus created, "the only creature on earth which God willed for itself" (GS, 24), and "alone is called to share, through knowledge and love, in God's own life", this "is the fundamental reason for its dignity" (CCC, 356). Therefore, the value and dignity of the human person are not derived from any form of belonging or potential accomplishment but from the very nature of their being. This is, then, an ontological dignity, a gift of love from the Creator Himself.

The mystery of the Heavenly Father and His love, which reveals to humanity its true dignity, is made known to humankind through His Son, Jesus Christ. "In the mystery of the incarnate Word, the mystery of man truly becomes clear." (GS, 22; CCC, 359) According to Christian doctrine, the fullness of human dignity and exaltation is manifested precisely in the fact of Jesus's Incarnation – whereby God the Father sent His Son, who took on human nature and thus, uniting Himself in a certain way with each person (GS, 22), granted an immeasurable and indelible dignity to every human life through His Incarnation. By proclaiming the Kingdom of God to all, especially to those on the margins of society – those who, by human standards, were considered devoid of dignity – Jesus affirmed the Creator God's original declaration of the unconditional dignity of every human being.

Finally, the full confirmation of human dignity is revealed through Christ's Resurrection, which opens to each person the possibility of eternal communion with God. Thus, the Church, based on the revelation of God's universal love, grounds its view not only on the ontological dignity of every human being but also on each person's openness to the goal of salvation. Consequently, Christianity does not confine the history of salvation within the limits of the Church. All human history should be seen in the light of God's love, which desires that all people be saved and come to the knowledge of the truth (1 Tim 2:4). In this way, through its eschatological hope and apostolic mission, the Church is, in the fullest and truest sense, catholic, directed toward all humanity. Hence, Catholic theology calls every individual to express their ontological dignity on both existential and moral levels and, within the freedom entrusted to them, to develop it toward its complete fulfillment.

The realization of the social conditions for all forms of human freedom, including religious freedom, is a fundamental task of state and political order, which the CTI document insists on. Human rights are rooted in the dignity of the human person; thus, they precede and stand above the state. No state has the authority to manipulate these rights at will but must instead respect, defend, promote, and build upon them. Catholic theology fundamentally holds that the person is not in service to the state; rather, the state exists to serve the person, and every political authority and system must be evaluated and continually directed according to this principle.

However, to be properly understood, rights and freedoms based on the dignity of the human person must be considered within the context of a broader social framework. This is especially crucial in the modern and postmodern era, marked by a noticeable disregard for social connectedness, obligations, and responsibilities, with a focus on rights and freedoms solely as individual entitlements. Some contemporary theologians, therefore, perceive democracy not merely as a characteristic of social and political organization but as an identity of the modern individual who, by absolutizing personal freedom, rights, institutional protections, and social guarantees, neglects their obligations to society and its institutions. This line of thought is reflected, for instance, in the writings of Italian fundamental theologian A. Matteo (Matteo, 2017, 155–181). Regrettably, modern Christians, too, are increasingly conforming to their time and becoming *democratic individuals*.

The Christian doctrine of God centers on the mystery of the Trinity, manifesting as a realization of God defined as love. This mystery is not merely an object of Christian theology but serves as its foundation and the environment from which it reflects on the overall reality. Thus, to think responsibly in a Christian sense means to contemplate all reality relationally, within a harmonious unity. This approach grounds Christian theology in the value of the individual's personhood and freedom, while also directing them toward social connectedness and community as the only possible setting for achieving the fullness of personhood. Personal rights and freedoms, therefore, entail dialogue, obligations, and a life lived for and with others. In this light, the CTI highlights the right to religious freedom but rejects its absolutization. All rights based on human dignity rest on a concept of freedom realized through responsibility for others and for the common good. Human dignity, when understood through the relational conception of the human person, excludes and restricts any individualistic understanding of freedom or any struggle for self-affirmation at the expense of the common good and the good of others. Within the context of each individual's belonging to the broader human community, even the right to religious freedom cannot be a right to absolute freedom. On the contrary, its very foundation implies its limitations; it must be realized only in synergy with the fulfilment of other human rights. Moreover, every form of human freedom – especially religious freedom – must be freed from selfishness, narrow-mindedness, irresponsibility, and any lack of compassion for others.

For example, acts such as taking human life in the name of religious conviction, religious persecution, religiously terrorism, prohibiting religious conversion, intolerance towards others, criminal acts, abuse, mutilation, coercion, manipulation, slavery, and any other practices that diminish or infringe upon human rights – especially those of the vulnerable, including women, children, the elderly, and the sick – cannot be deemed expressions of religious freedom or religious rights. Consequently, religious regulations must not override civil laws designed to protect human dignity and fundamental rights; rather, they should be aligned with them. Practically, this requires all religious communities functioning within modern democracies and seeking the state's protection for religious freedom to recognize the separation of religion from political authority and, therefore, to accept the principle of a secular state with its sovereign power to enact laws that safeguard individual dignity and communal life. The neutrality of the state should be understood as impartiality towards religions and religious beliefs, but not their separation from social life (Wolterstorff 1997, 115). The state, in turn, should evaluate and support these communities based on their contribution to the common good and the affirmation of each person as a dignified individual. Within the context of the modern understanding of democracy and secular political culture, this is particularly important with regard to the proper attitude of states towards those religious communities in which fundamentalist and sectarian elements are encountered, and which are not in line with civilizational achievements in matters of human dignity and rights and coexistence with others.

Furthermore, this stance is important for the internal purification of the Church itself and for maintaining its distanced relationship with all forms of state arrangements. Since the Church's primary mission is to proclaim the salvation that comes from the one true God and to lead humanity away from idols toward genuine faith, in the social-political realm, this implies that the Church should actively promote the desacralization of every political order, aiding secular society in freeing itself from any substitutes for religious experience within its structures. As the document points out, both theocratic and atheistic states represent equally flawed solutions, as each replaces faith in the true God with ideology. In other words, this commitment serves to realize an authentic ecclesiology, specifically the catholicity of the Church. By advocating for a secular state and the principle of separation between religion and politics, that is, the Church and the state, the Church is advocating for its freedom, which is essential to its Catholic authenticity and mission. This is important not only within the political formation of Europe, where Christians are at least nominally still the majority, or those parts of the world where Christians are the majority, but also for those regions where Christians are a minority (an example of theocracy in some Islamic countries). The Church, because of its catholicity, but also because of the principle of reciprocity, must advocate for the equal rights of all people in all social and state systems throughout the world, regardless of their faith. Only within such freedom can the Church fulfil its credibility and purpose. Every person must freely choose to follow Christ, without coercion from any general religiosity that is subject to customs,

traditions, or state or national pressures, nor driven by privileges from these sources. Only faith chosen personally can hold true, vital relevance.

Accordingly, in this document, the CTI addresses first Christians and then all religions, states, and political systems. The political dimension of religious rights and freedoms is given significant weight. Clear and unambiguous expectations are set for states and political systems to support, strengthen, and protect the religious freedom of each individual and all communities. This perspective is understandable given the Church's catholicity and its commitment to the welfare of all people. Throughout the document, it is evident that the Church advocates not only for the rights of Christians but that its positions are grounded in the very essence of the faith, specifically, in a life lived in relationship with God. This entails true reverence for God expressed through respect for each person as an image of God and a being worthy of God's friendship and love. Human dignity is a divinely bestowed value upon every person, rendering it inviolable and transcending all differences of gender, social status, politics, culture, and religion. In this light, the Church sees a democracy built on human rights and freedoms as the political structure that, in present circumstances, most effectively supports this truth, thereby contributing to universal peace and the realization of fundamental Christian values.

All theological positions and council directives are clear as principled stances, yet the CTI document emphasizes the need for an ongoing development of the faithful's awareness in line with these principles, especially in response to the changing conditions of today's world, marked by heightened globalization and significant migration prompted by political and economic crises. Viewed from this perspective, this represents a shift in paradigm—from a model of communal worship within a single nation, culture, or religion, toward the acknowledgment of God's presence in every individual as His beloved creation, which is a foundational theological postulate. Naturally, this shift also calls for a reimagining of the Church as a community of believers. Moving away from the pre-conciliar view of the Church as a "great people", a perspective that lingered even after the Council, the concept of the Church as a "little flock" and leaven in the world is gradually emerging. This world also includes those who hold different beliefs or no faith at all. In this context, "being a minority" becomes a new definition of the Church and an evangelical opportunity.

The principled emphasis on equal rights to religious freedom does not imply a simplistic equalization of all religious groups. According to this document, the aim is to acknowledge equal rights while considering the extent to which each religion contributes to the dignity of the human person and the common good. It is crucial to ensure that the recognition of equality does not suppress the diversity arising from religious beliefs and cultural distinctions. Such diversity remains an internal matter for religious communities and is appreciated as mutual enrichment. The role of the state is to respect the fundamental equality of rights while acknowledging natural, historical, and socially conditioned religious pluralism. Thus, the state must ensure that all religious and cultural differences serve the common good and, by this criterion, provide institutional support.

For such coexistence, in addition to positive state laws, dialogue and mutual understanding among believers are essential, as they also foster a deeper knowledge of one's own faith through comparison with others. Interreligious dialogue is not merely about human friendship or a civilized respect for others and their differences; rather, it requires believers to be convinced in their own faith, which involves a genuine engagement with the question of truth before opening to dialogue with others. In dialogue with Jews, for Christians, this centers on the question of Jesus' resurrection; in dialogue with Muslims, it is the question of Jesus' divine sonship; with both, the nature of the Holy Trinity remains an open topic. Such dialogue requires faith that, along with internal conviction, demands understanding and knowledge. Of course, alongside these theological themes, interreligious dialogue also addresses broader questions of coexistence and social and political structures that allow all to live peacefully and well, ensuring the preservation of the Earth and other creatures and caring for our shared future.

5. Conclusion

The document "Religious Freedom for the Good of All" does not aim to provide a detailed analysis of the political and ecclesial interpretations of the theme of religious freedom, but it offers a valuable reflection on the contemporary relationship between the Church and politics. In this sense, it serves as a resource for Christians living their faith in the modern world within the various states and political systems, extending an invitation for open dialogue to all governments and policies that prioritize similar values. Rooted in revelation and Christian teaching, the document seeks to interpret these foundations within the changed conditions of today's world. This is not an expression of theological relativism, but rather a realistic approach to the global context and the pursuit of coexistence. The discourse conveys the conciliar position of openness on the part of the Church towards the world and an appreciation of civic and secular values. There is an emphasized awareness that Christians do not live in isolation from the world, but rather as citizens of the world, in specific nations, and under various political structures, sharing life with all others and participating in a common destiny.

In addition to addressing Christians, it addresses to states and governments, particularly concerning the clarification of the relationship between the Church's self-understanding and that of the state, a relationship that does not always proceed without conflict across all political systems. It emphasizes the necessity of religious and political dialogue and cooperation, with the shared goal of achieving complete humanity, while clearly delineating the nature and scope of these two realms. Expectations of the state are framed in terms of the explicit protection of religious rights and freedom of conscience, as well as the equal treatment of religious communities that contribute positively to the common good. The freedom of every person, especially religious freedom and freedom of conscience, serves as the measure by which the dignity and value of each state and political order

are evaluated. Human freedoms arise from the ontological dignity of the human person, which is a postulate of Christian doctrine on God and Christian anthropology. Based on this dignity and the rights that proceed from it, Catholic theology supports religious and cultural pluralism as a characteristic feature of contemporary democracy.

While it values democracy as a political system more capable of protecting human dignity and one that has made significant progress on a global scale, theology does not see it as the fully perfected form of communal life. It views it as an open process that still reveals deficiencies and crises, and in which intervention from various instances is both allowed and necessary. This understanding establishes both the right and the duty of Christians to actively participate in social and political life. Human rights and freedom come with corresponding responsibilities. The right to personal freedom and resistance against illegitimate and inhumane structures, manifesting most profoundly in freedom of conscience, must be connected with the duty to oppose these same injustices. Indifference to such responsibilities, a type of civic apathy or sectarian withdrawal into religious communities without broader social awareness, contributes neither to personal growth nor to the common good, and should not be the stance of believers. Thus, in advocating for the right to religious freedom, the Church educates the faithful for greater maturity in their own Christian conscience and strives to foster a space for believers' contributions within all human societies and political systems.

Through this line of thought, Catholic theology does not aim to cast doubt on the fundamental principle of a secular democratic state. Rather, it aims to enhance a proper understanding of secularism, freeing the state from any surrogate forms of religiosity within its framework. If the separation of religion and politics is understood as excluding religious content from public discourse, such secularism would, in itself, be a dangerous ideology. According to the CTI, all expressions of faith that contribute to the good of each person and to universal human fraternity should be included in public discourse as equal contributions to its development. The rule that forbids Church officials from engaging in politics cannot be used as an argument to deny all believers the competence and right to participate in political life.

The document affirms that all the Church's positions regarding the world, states, and political systems are rooted in theology: the doctrine of God, specifically Christology and the doctrine of the Trinity, Christian anthropology, ecclesiology, and eschatology. The Church's theology begins with the revelation of God, who is love in Himself, and from that love, He creates humanity in His own image. Consequently, the Christian anthropology derived from therein views the human person both in terms of individuality and in communion with others. In line with this, the Church's approach to states and political systems starts with the individual person, but it also seeks to consider and address politics on a global scale. In this light, the CTI document aims to guide the perspective and responsibility of states, nations, and political systems away from narrow domestic policies and individual foreign strategies toward a global worldview and approach to policy. This stance

is rooted in the belief that only global human solidarity can fulfil the full potential of humanity, universal peace, fraternity, and solidarity among peoples, as well as mutual aid, particularly in times of crisis or existential threats to life. Only a comprehensive and solidaristic policy, which might also be referred to as a form of global democracy, can fully justify its mission in the service of the complete realization of human dignity.

Abbreviations

CCC – Catechism of the Catholic Church 1994.
CTI – Commissio Theologica Internationalis [International Theological Commission].
DH – Second Vatican Ecumenical Council 1965a [Dignitatis humanae].
GS – Second Vatican Ecumenical Council 1965b [Gaudium et spes].

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Marjan Turnšek (ur.)

Stoletni sadovi

Člani katedre za dogmatično teologijo v jubilejnem letu z zbornikom predstavljajo »dogmatične sadove« na »stoletnem drevesu« TEOF v okviru UL. Prvi del z naslovom »Sadovi preteklosti« s hvaležnostjo predstavlja delo njenih rajnih profesorjev. Kako katedra živi ob stoletnici svojo sedanjost in gleda v prihodnost z upanjem, predstavljajo prispevki živečih članov katedre v drugem delu pod naslovom »Sadovi sedanjosti«. Tretji del ponuja »Podarjene sadove«, ki so jih ob jubileju poklonili nekateri pomembni teologi iz tujine, ki so povezani z našo fakulteto (zaslužni papež Benedikt XVI., Hans Urs von Balthasar, Jürgen Moltmann, Bruno Forte, Marino Qualizza in Marko I. Rupnik).

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Sava Milovanović

"May the Old Customs Be Observed": Canons on Custom and Their Significance for the Contemporary Life of the Serbian Orthodox Church

»Naj se spoštujejo stare navade«: kanoni o navadah in njihov pomen za sodobno življenje Srbske pravoslavne Cerkve

Abstract: This paper represents an analysis of a custom from the life of the Serbian Orthodox Church, connected to the celebration of the feast of Saint Archangel Michael as a family patron saint day (Slava), commonly known as "*Aranđelovdan*" (Archangel's Day). In some Serbian regions, hosts refuse to prepare boiled wheat or *koljivo* for the feast of Saint Archangel Michael, claiming that *koljivo* is prepared exclusively for saints who have died. At the same time, maintenance of this custom is often justified by the argument that it is inherited from ancestors and, in that sense, represents part of family heritage or a certain kind of pledge. After an analysis of the Holy Canons, it is concluded that the criterion by which the canons accept a custom as legitimate is compatibility of that custom with apostolic tradition. From that perspective, we will seek to show why that is not the case with the aforementioned custom observed on Saint Archangel Michael's day.

Keywords: Slava, Saint Basil the Great, Saint Archangel Michael, *koljivo*; John Zonaras, Theodore Balsamon

Povzetek: Prispevek analizira običaj v Srbski pravoslavni Cerkvi, povezan s praznovanjem praznika svetega nadangela Mihaela kot družinskega zavetnika (slava), ki je splošno znan kot »Aranđelovdan« (dan nadangela). Pri tem v nekaterih srbskih regijah gostitelji pripravo kuhane pšenice ali koljiva ob prazniku svetega nadangela Mihaela zavračajo, saj menijo, da se koljivo lahko pripravlja izključno za umrle svetnike. Ohranjanje tega običaja pogosto utemeljujejo z argumentom, da je podedovan od prednikov in tako predstavlja del družinske tradicije ali neke vrste zavezo. Analiza kanonov je pokazala, da je merilo za sprejem običaja kot legitimnega njegova združljivost z apostolsko tradicijo. S tega vidika bomo poskušali pokazati, zakaj to za omenjeni običaj ob praznovanju dne svetega nadangela Mihaela ne velja.

Ključne besede: Slava, sveti Bazilij Veliki, sveti nadangel Mihael, *koljivo*, Joanes Zonaras, Teodor Balsamon

1. Introduction

Customary practice is present in various fields of human activity. Custom is a subject of study in philosophy (ethics), law, sociology, and ethnology. The aim of this paper[1] is to approach the phenomenon of custom as a paradigm of Church life from the perspective of the canon-law tradition of the Church.

In the Serbian-speaking context, custom is usually identified with a certain ritual that represents an integral part of the celebration of Church feasts within the family environment. That ritual is often, in the absence of authentic ecclesiastical consciousness, the only – unfortunately, by many also perceived as a "sufficient" – connection of an individual, and families, with Church tradition. From the many different definitions of the notion of "custom", the one most suitable for our research seems to be that given by Milenko Perović – a custom is "by habit established way of practical life of some ethnic or social group" (Perović 2004, 220). As has already been noticed, customs are based "on, from religion derived worldview" (Zorić 1991, 9), but those who practice them are often "characterized, first of all, by the absence of awareness of the purpose and reasons for which they exist." (Zdravković 2005, 138–139) When it comes to the contemporary Serbian context, it should be added that, in most cases, the notion of the original meaning of customs has been lost, while the way some of them are practiced is in contradiction with the authentic ecclesiastical consciousness (Milošević 2022a; 2022b). However, their existence is defended by tradition, i.e. longevity, by the fact that "that was the way of the ancestors." In this paper, we will aim to show in which case – according to the canons of the Church – a custom can be a criterion in Church life, referring specifically to one custom associated with the celebration of Saint Archangel Michael.

2. Custom in the Canonical Tradition of the Church

In the canons of the Church and in the acts of ecumenical and local councils we find several terms that are used to denote a custom: ἔθος; συνήθεια; ἦθος; as a syntagm "κατὰ τὸ εἰωθὸς" (for example in the 1st canon of Saint Cyril of Alexandria [Rhallē and Potlē 1854, 356]) meaning "according to the custom" (Senc 1910, 245), which is a participle perfect of the verb "ἔθω" – "be used to" (Liddell and Scott 1996, 480); it can be also found in the feminine gender – "τῆς εκκλῆσίας εἰωθυίας" (3rd canon of Theophilus of Alexandria [Rhallē and Potlē 1854, 344]) – "the Church usually excludes such men"[2], but also in perfect of the same verb – "εἴωθε" (37th canon of the Council of Carthage [Rhallē and Potlē 1853, 400]), "as is the custom";

[1] This work was created within the framework of project No. 179078 ("Serbian Theology in the Twentieth Century: Fundamental Assumptions of Theological Disciplines in the European Context – Historical and Contemporary Perspective"), funded by the Ministry of Science, Technological Development and Innovation of the Republic of Serbia.

[2] In our translation of the Holy Canons in this paper, besides the Greek original, we used also the Serbian translation in: Jevtić 2006.

as adverb "εἰκότως" (81st canon of the Council of Carthage [Rhallē and Potlē 1853, 505]) – what bishop Athanasius Jevtić translates as "according to custom" (Jevtić 2006, 356); in the form "εἰθισμένον" (14th canon of the First-Cecond Council 861 [Rhallē and Potlē 1852, 692]) – "accustomed, usual" (Senc 1910, 244).

In the early Church, certain aspects of ecclesiastical life were arranged according to customs that had to conform to the teaching of the apostles. That is testified by Tertullian in the often-quoted (Milaš 1902, 52; Cisarž 1970, 28; Troicki 2011, 89; Perić 1999, 38; Gardašević 2002, 294) passage from his work De Corona: "If no passage of Scripture has prescribed it, assuredly custom, which without doubt flowed from tradition, has confirmed it." (Tertullian 1995, 94) Speaking about various customs related to the Holy Mystery of Baptism and some other aspects of Christian life, Tertullian concludes: "If, for these and other such rules, you insist upon having positive Scripture injunction, you will find none. Tradition will be held forth to you as the originator of them, custom as their strengthener, and faith as their observer." (95) Thus, in the Church, from her very beginnings, some aspects of her grace-filled and salvific life were regulated by unwritten rules, yet exclusively by those which were deemed not to be in contradiction with the principles of apostolic tradition (Milaš 1902, 50).

When discussing the notion of custom in the second millennium of the Christian era, we approach the consideration with the prior knowledge of the already formed canon of Holy Scripture, as well as with the generally accepted collection of canonical regulations, better known as *Nomocanon in Fourteen Titles* or *Nomocanon of Photius*. However, the position of Christians in the first three centuries was drastically different. This was a period of active efforts of various heretical groups to reduce the normative collection of Church books or to expand it with writings these groups considered authoritative (Dragutinović 2010, 33–44). As for canonical texts, although principles originating from the Holy Apostles can be identified in the so-called Apostolic Canons, even that collection was not formed before the fourth century (Jevtić 2006, 31–36), while the earliest council whose canons are today regarded by the Church as universally valid gathered in Ancyra in 314. Based on this, it can be inferred what significance inherited customs had for the martyr Christian generations of the first three centuries.

In the canonical texts of the Church, great respect is expressed toward unwritten custom that is part of Church tradition. Some canons represent a "legalization" of the inherited custom: "Those who join the Orthodoxy, and the part of those who are being saved, from heretics, we receive according to the following order, and custom /... /." (Rhallē and Potlē 1852, 187; 7th canon of the Second Ecumenical Council, repeated in the 95th canon of the Council in Trullo; see also the 8th canon of the Third Ecumenical Council, the 90th and 102nd canons of the Council in Trullo, the 14th and 15th canons of the Seventh Ecumenical Council, the 70th of the Council of Carthage, canons 3 and 4 of Saint Basil the Great, canons 7 and 8 of Saint Gregory of Nyssa, canon 2 of Theophilus of Alexandria) Saint Basil the Great is particularly striking regarding the significance of unwritten rules or customs in his work On the Holy Spirit. A passage from this work constitutes the 91st canon of this Saint:

> "Because if we attempt to reject the unwritten customs as not having great power, we will without awareness do damage to the Gospel in principal things, rather reducing the preaching to a bare name. As for instance (to mention firstly what is first and most common), shape of the Cross with which those who hope in the name of our Lord Jesus Christ seal themselves, who thought (us) by a writing? To turn toward east during prayer, which writing thought us? The words of invocation (ἐπικλήσεως) during the elevation (ἀναδείξει) of the bread of thanksgiving (εὐχαριστίας), and the cup of blessing, who of the saints left to us in writing? For surely we do not satisfy with these [words, S.M.] which the Apostle or the Gospel mentions, but we say before and after other [words, S.M.], as having great power in relation to the mystery, receiving [them, S.M.] from unwritten teaching. We bless the water of baptism, and the oil of unction, and the baptized one also: according to which writing? Isn't it from the oral and mystic tradition? What: the anointing of oil, which written word thought [us, S.M.]? That a man is immersed three times [when baptized, S.M.], from where? But also the things concerning baptism, to renounce the Satan and his angels, from which biblical text is it? Isn't it from that unannounced and secret teaching, which the Fathers preserved in not meddled with (ἀπολυπραγμονήτῳ) and simple (ἀπεριεργάστῳ) silence, rightly being thought that the honour of the mysteries is preserved in silence?" (Rhallē and Potlē 1854, 283–284; Jevtić 2006, 500–501)

Thus, according to the testimony of Saint Basil, customary heritage had its place even in the Mystery of Mysteries – the Holy Eucharist – because it was considered part of the apostolic tradition, which is the criterion for the validity of a custom.

Precisely because they are not part of that Tradition, certain customs inherited from paganism are rejected (canons 62, 65, 71 of the Council in Trullo; canon 24 of the Council of Ancyra; and canon 84 of Saint Basil the Great). However, some pagan customs associated with certain agricultural works persisted not only until the end of the 7th century (as evidenced by the aforementioned canons of the Council in Trullo [691]), but, according to the testimony of Byzantine commentators of canons, John Zonaras and Theodore Balsamon, were still being practiced even in the 12th century (Rhallē and Potlē 1852, 449; 451; Pravila 1877, 484; 486). Commenting on the 62nd canon of the Council in Trullo, Bishop Athanasius Jevtić writes that "the struggle with paganism lasts in the man himself during life", and that the function of the Holy Canons in the Church is to contribute to the formation of a new, Christ-like man within him (Jevtić 2006, 175). This very understanding of the role of canonical regulations in the life of the Church represents the starting point for the analysis of a specific custom that we will conduct in this paper.

3. One Custom Related to the Feast of Saint Archangel Michael

Among blessed and Church-approved customs of the Serbian people[3] is also the celebration of Slava (the family patron's day). Various theories about the origin of this custom have been proposed, not only by theologians. For example, it has been assumed that the basis of Slava was the Roman pagan cult of household deities Lares and Penates, the cult of the Sun god, the Old Slavic cult of the dead, and others. (Čajkanović 1985, 13–14; Petrović 1985, 17–23; Kalezić 2005; Mandić, Đorđić and Damjanović 2016, 124–125; Marjanović 2011, 208–209; Vlahović 1998, 24–25). For the Serbian Orthodox Church, however, as expressed by Patriarch Pavle, Slava represents "the day of celebration of the Saint on whose feast the ancestor of a family was baptized, took the name of that Saint, celebrated that day himself and left that as a legacy to his descendants" (Kalezić 2005, 3).

Theologians generally agree that the efforts of the first Serbian Archbishop Saint Sava to eradicate pagan remnants and consolidate Orthodox Christianity in the medieval Serbian state represent a turning point in the establishment of Slava as a family celebration in the name of the protector saint (Grujić 1985, 458–463; Bogdanović 1985, 486–511; Kalezić 2005, 38–45). Radoslav Grujić linked the origin of Slava to the Old Slavic cult of making vows to a particular deity, which, after the adoption of Christianity, was transformed into vowing to a specific saint, to whom also the temple was built. Vows were made not only by individuals, but also by entire clans or family communities, led by their head. However, even after the Christianisation of this ritual, the Slavs continued – following the Old Slavic custom – to bring sacrificial livestock to churches to be blessed by priests, after which those animals would be ritually slaughtered by the priests, and after that, a banquet would be prepared from their meat around the churches. At the initiative of the first Serbian Archbishop, Saint Sava, these banquets were moved from the churchyard to private homes, while with the church remained exclusively associated the offering of bloodless sacrifice on these holidays – candles, incense, bread, wine and – *koljivo* (boiled wheat). (Grujić 1985, 458–463) Since the custom we intend to analyse in this paper from a canonical perspective is related to the preparation of *koljivo* in memory of Saint Archangel Michael, we will devote more attention to that aspect of the Slava ritual.

Among the Serbian Orthodox population, the preparation of *koljivo* for Slava is not widespread (Bogdanović 1985, 495; Marjanović 2011, 211; 214). In some regions (for example, in the villages of the Kolubara region), some believers do not want to prepare *koljivo* for the feast of Saint Archangel Michael, under the pretext that he is a "living saint"[4]. In this way, the understanding is expressed that all other saints celebrated as protectors of families, and who ended their life either by a

[3] Although Slava is not an exclusive characteristic of Orthodox Serbs, among them this feast is most prevalent (Vojvodić and Vojvodić, 2010, 475; Kalezić 2005, 11; 59–62; 102).

[4] We would like to thank Father Marko Milovanović, parish priest of Slavkovica, who explained to us this practice he encountered in his parish.

natural or martyr death (e.g., Saint Nicholas of Myra, Saint George the Great Martyr, Saint Alypius the Stylite, etc.), require offerings for their repose after their death, just like all other deceased Christians who are not celebrated as saints. This custom is, therefore, based on: a) a mistaken understanding of "holiness", and b) a mistaken understanding of the liturgical meaning of *koljivo*.

3.1 The Notion of Holiness in Christianity

The notion of "holiness" in Christianity is highly complex, and a more detailed analysis lies beyond the scope of this paper. Therefore, we will highlight only those aspects relevant to our topic.

All Christians are called to be holy: "But as he who called you is holy, you also be holy in all your conduct, since it is written: 'You shall be holy, for I am holy." (1 Pt 1:15-16)[5] Apostle Paul addressed the Christians of Ephesus as "saints" (Eph 1:1). Thus, holiness is the aim of every member of the Church (Filaret 2007, 518–522). However, very early on, certain Christians were shown special reverence after their death, which was closely connected to their miraculous relics. The cult of holiness developed within a local Church community around the saint's relics, with special importance given to the miracles associated with them. With the tacit approval of the local hierarchy, a service and hagiography were written, icons were painted, and the saint's annual commemoration was liturgically marked. The situation changes somewhat in late Byzantium, in the period of the Palaiologos dynasty (13th–14th century), when the synod based in Constantinople, headed by the patriarch, began proclaiming the holiness of God's holy servants through decrees – to "canonize" them. Such recognition did not imply that a person's holiness depended on the decision of the synod, but rather that the saint in question was included in the calendar of Hagia Sophia in which way his or her veneration was encouraged, and his or her teaching affirmed as correct and orthodox, which was especially significant in the context of the intense ecclesiastical disputes of the time (the anti-unionist struggle, the hesychast controversies). (Makrides 2008, 130–136) In any case, the assembly of saints represented, for the Church, an assembly of intercessors for the human race before the throne of God, and in that sense, a cause for thanksgiving, not for prayer that their souls might rest in peace – since they already possess that peace. Any offering made for the "repose of the soul" or "forgiveness of sins" which is usually offered for departed Christians, would be inappropriate in the case of the saints (Kalezić 2005, 78). Speaking about the commemoration of saints in the Eucharistic sacrifice, Saint Nicholas Cabasilas writes that any prayer for the saints with such a purpose would amount to mere "idle talk" (ληρεῖν). On the contrary, the Eucharist is offered for them as well, but as thanksgiving, because they received what the entire Church longs for – holiness, and not as a prayer for the forgiveness of their sins. (Kavasila 1865, 473; 476; 480–481; Kavasila 2017, 174–175; 181)

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[5] Unless otherwise indicated, all Scripture quotations are from The ESV Bible (The Holy Bible, English Standard Version), published by Harper Collins Publishers, 2001 by Crossway.

The main ingredient of *koljivo* – wheat – is a symbol of resurrection (Jn 12:24) (Kalezić 2005, 50). As Christ himself says, if the wheat grain does not die, it will not bear fruit (Jn 12:24; 1 Cor 15:36). If a person does not "mortify" himself or herself through spiritual struggle, they will not be resurrected to eternal life (Popović 2001, 135–138). That paradox ("folly to Gentiles" [1 Cor 1:23]) has been one of the central motives in the life of all Christian saints – martyrs, ascetics, confessors, righteous ones, and others – who did not spare not only anything of their own, but not even life itself in order to bear witness to and glorify Christ. Their dying – whether seen as a matter of moment (martyrs) or as a continual dying to this world through ascetism and spiritual struggle (ascetics) – happened with hope and a foretaste of eternal life. That is why wheat is, in a way, also a symbol of their life – they are the wheat in the Lord's field from the Gospel parable, which the weeds did not choke (Mt 13:24-30).

The illogical nature of the dilemma regarding *koljivo* among some Serbian Slava celebrants is also revealed by reference to the authentic liturgical function of *koljivo* during the commemoration of saints.

3.2 Liturgical Meaning of *Koljivo*

In contemporary Serbian, there is no terminological distinction between *koljivo* prepared in honour of a saint and that prepared for the commemoration of the deceased. However, such a distinction existed in old Serbian handwritten and printed service books (*služebnik*) and books of needs (*trebnik*). For the integration of *koljivo* in the liturgical life of the Church, a well-known tradition of the miracle of Saint Martyr Theodore the Tyron during the time of the Roman emperor Julian the Apostate (361–363) is especially significant. Namely, in an effort to revive pagan polytheistic religion, of which he himself was a supporter (Mirković 2016, 168–171), the emperor ordered that all foodstuffs in the markets of Constantinople be sprinkled with the blood of animals sacrificed to idols, with the intention of defiling Christians who would eat those foods. Upon learning this, concerned Christians asked their archbishop Eudoxius what they should do. Following the advice of Saint Martyr Theodore, who appeared to him in a vision, the archbishop told them to prepare *koljivo* – boiled wheat – and to eat it. Since then, the Church has established the custom of blessing *koljivo* on the day of Saint Theodore on the first Saturday of Great Lent, after the Vespers on Friday. Since, according to the liturgical order, the commemoration of the departed is performed afterwards, Kalezić assumes that this led to the practice of blessing *koljivo* also during the commemoration of the deceased (Kalezić 2005, 51).[6] According to the testimony of Blessed Augustine, in his time Christians used to bring certain foods to the graves of the martyrs to be blessed, and then they ate them or distributed them to the

[6] Professor Nenad Milošević points to the similarity between the memorial service for the death (*Parastos*) and the service of the *Panikhida* (παννυχίς), a prayer for the "whole night", which, according to the testimony of Symeon of Thessalonica, in his time was celebrated following the Liturgy of the Presanctified Gifts. The Parastos, as a distinct akolouthia, probably emerged through the combination of the Canon for the Departed – which the Triodion prescribes to be performed every Friday after Vespers – and the *akolouthia* of Panikhida. (Milošević 2021, 279–284)

poor (Augustin 1995, 164–165; 1982, 611; 613; Grujić 1985, 461–462). Grujić held that the reference here is specifically to *koljivo* (Grujić 1985, 461–462). In both cases – when *koljivo* is prepared in memory of the saints and when it is prepared in memory of deceased Christians – its main ingredient, wheat, symbolizes the Christian faith in the resurrection that comes despite physical death, for those who believe. (Grujić 1985, 423; Kalezić 2005, 49–52)

Koljivo was accepted as an element of the liturgical rite on the family patron's day modelled on the Old Testament vegetable offerings, and Grujić demonstrated that, most likely, the original liturgical "topos" of Slava wheat is the blessing of the five loaves, wheat, wine and oil during Vespers on the eve of great feasts (*Artoklasia* – The Blessing of the Five Loaves). That is evidenced by the oldest rite of blessing *koljivo*, which, at the time Grujić wrote his article (for the first time published in Glasnik Srpskog naučnog društva VII–VIII for the year 1930 [Kašić 1980, 58]), was practiced by the inhabitants of the village of Drenok in what is now North Macedonia. Namely, Slava celebrants would bring *koljivo* to the Vespers and pour it into a common large vessel. The priest would bless the *koljivo* during the rite of the blessing of the five loaves, and after Vespers, he would distribute it to all the celebrants to take it to their homes. (Grujić 1985, 413–432) Another evidence for Grujić's assumption may be that in the old *Serbian Service Book* (*Služabnik*) from the 13th century, "Prayer over Kutija (=*Koljivo*) at the Offering to the Saints" closely resembles the prayer for the blessing of the five loaves (Jevtić 2007a, 429).

In general, the blessing of *koljivo* in the Slava rite becomes "a kind of offering in honor and memory of certain saints, as well as for the repose of the souls of those who previously themselves brought their offerings, also to the church, in glory of those saints" (Grujić 1985, 424). Such an understanding is also expressed in the Rite for the Blessing of *Koljivo* in today's Service Book: " /... / for your servants offered this in Your glory, and in honor of Saint (name), and in memory of those who passed away in pious faith." (*Služebnik* 2017, 298).

A confusing factor in the case of the celebration of the angelic powers is the fact that they are God's creatures, which do not undergo bodily death, since they are bodiless and – by grace – immortal.[7]

Given that *koljivo* is prepared for the commemoration of a saint or the departed, it should be borne in mind that every act of remembrance in the Church aims at the "embodiment" into the communion of saints – the Church (Milošević 1998, 56), just as every offering is meant to culminate in the Mystery of Mysteries, the bloodless sacrifice of the New Testament – the Holy Eucharist. Therefore, in order to discover the authentic meaning of the offering of *koljivo* in commemoration of a saint during the celebration of Slava, the starting point should be the liturgical commemoration of the saints performed during the Anaphora. The commemoration within the Diptychs in the Liturgy points to the fact that we are all – saints,

[7] "An angel, then, is an intellectual nature, ever-moving, of free will, bodiless, ministering God, who by grace received an immortal nature." (Damaskēnou 1864, 865) We also used the Russian translation in Afinogenov et al. 2002, 187. See also: Popović 1932, 232–234.

living, the departed – one body in the Church, co-members of the one Body of Christ, the Church. It should be noted, in the context of the feast discussed in this paper, that within the Diptychs in the Holy Liturgy, "Holy Bodiless Powers" were once commemorated, together with the Holy Forerunner, the Apostles, and all other saints, as is the case, for example, in the oldest Slavic-language service book, the *Service Book of Varlaam of Khutyn* from the late 12th to early 13th century (Jevtić 2007b, 67; 78–79), and in the *Service Book of the Solovetsky Collection* from the 13th century (2007a, 379). The commemoration of the Bodiless Powers in the Diptychs and the Oblation is omitted today, but this old practice affirms that, within the Orthodox tradition, the Bodiless Powers as well are regarded as members of the Church of Christ.[8] In general, this part of the Anaphora reflects the understanding of the unity of the Church of Christ as a single unique heavenly-earthly reality. Saint John Chrysostom speaks about this in his 41st homily on the First Epistle to the Corinthians:

> "Let us, thus, not cease to help the departed, and to offer prayers for them; for the universal cleansing of the whole world lies (κοῖται). Because of this, we dare to pray for the whole world at that time, and we commemorate them with the martyrs, with the confessors, and with the priests. For we are all one body, even though there are members more radiant than others; and it is possible from all sides to gather forgiveness for them, from prayers, from gifts for them, and from those who are commemorated with them." (Chrysostomou 1862, 361)[9]

The prayer for the blessing of *koljivo* – in which the living members of the household are mentioned, and departed relatives, as well as the saint in whose memory the *koljivo* is offered – points to the same unity in Christ and in the Church. That the *koljivo* is prepared as a "memorial service to the saint" represents an understanding that is a remnant of pagan consciousness. As a symbol of the resurrection (Jn 12,24), it is prepared and offered in memory of the saint as a thanksgiving, and as a prayerful offering for the repose of the souls of departed ancestors. (Kalezić 2005, 50–55; 78–79; Protić 1995, 56)[10]

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[8] Speaking about Oblation, as it was performed in his time (15th century), Saint Symeon of Thessalonica speaks of the particle taken out for the heavenly bodiless powers: "And on the left [side, S.M.], from the other *prosphora* (προσφοράς) the priest while cutting out particles in the form of the cross from the seal with the spear, commemorates all the saints and places [particles on the Paten, S. M.]. And the first he offers in the honour and memory of the honourable heavenly powers. And it is necessary to offer for them, for they also served the mystery of oikonomia; and because they united with us, and *we are one Church* (S. M.); and since they long to glance inside the Mysteries of the Church, receiving ascent themselves; and because they are with us our guardians and intercessors to God." (Symeōn 1866, 280) in translating, we also used the Serbian translation found in: Jevtić 2007b, 289.

[9] In translating, we also used the translation of this passage of the Bishop Athanasius Jevtić, found in Jevtić 2009, 447.

[10] As emphasized by certain researchers of the Kollyvades movement which was active among Athonite monks in the second half of the 18th century, the movement's representatives understood *koljivo* as a symbol of the departed who, according to the word of Christ resurrects (Jn 12,24) just as a grain of wheat first dies, and then even more beautiful fruit is born from it (Rodionov 2014, 332; Radović 1976, 47).

4. Conclusion

Custom is one of the sources of canon law, according to which, throughout the history of the Church up to the present day, certain aspects of its life have been regulated. At the same time, only the custom which hasn't contradicted the teaching inherited from the Apostles has been adopted, that is, tolerated. Because they deviated from apostolic teaching, certain customs have been condemned as harmful to Christian life. The custom of not preparing *koljivo* for the feast of Saint Archangel Michael, practiced by some Serbian Slava celebrants, results from a misunderstanding of the function of *koljivo* in the liturgical rite and the meaning of the commemoration of saints in the prayers of the Church. Beginning with the Holy Eucharist as the archetype of every offering and commemoration in the Church, we conclude that *koljivo*, as an offering, has a twofold function. For departed ancestors who celebrated the family patron saint, it is offered for their repose, while for the saints – as with the Eucharistic sacrifice – it is offered as thanksgiving, because we have them as protectors and intercessors before God. In this sense, the argument of longevity in the case of the custom under analysis cannot be sufficient for its acceptance, since this custom belongs to those that are in contradiction with the Church's teaching–in this case, with the teaching on the meaning of the commemoration of God's saints and their dignity in the community of the Church. Accordingly, this custom cannot be accepted as a norm in the liturgical life of the Church.

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Christian Gostečnik

Psihoanaliza in sakralno izkustvo

Psihoanalitična relacijska paradigma predpostavlja, da imata tako religiozni kot nereligiozni človek svoje psihične razloge za vero oziroma nevero. Zato je pomembno ugotoviti v kakšnega Boga verujoči veruje oziroma v kakšnega Boga neverujoči ne veruje. Tudi religiozna oseba namreč ne veruje v Boga v katerega nereligiozna oseba ne veruje ali ne more verjeti.

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Urška Jeglič

Muslimani v Sloveniji v primerjavi z drugimi evropskimi muslimani

Muslims in Slovenia Compared to Other European Muslims

Povzetek: V Sloveniji močno prevladujejo avtohtoni evropski muslimani, ki pripadajo hanifitski pravni šoli in imajo svoje korenine na Balkanu – večinoma v Bosni in Hercegovini. Avtorica prispevka[1] ugotavlja, da muslimani v Sloveniji predstavljajo posebno skupino muslimanov v Evropi, na kar vpliva skupna zgodovina, kulturne podobnosti, jezik in izobrazbena struktura. V prispevku je predstavljena na novo oblikovana tipologija, ki muslimane v Sloveniji deli na dosledne, kulturne in obrobne vernike.

Ključne besede: tipologija muslimanov v Sloveniji, integracija, islam v Evropi, islam v Sloveniji

Abstract: Slovenia is heavily dominated by indigenous European Muslims who belong to the Hanifi school of law and have their roots in the Balkans – most of them in Bosnia and Herzegovina. The author of the article concludes that Muslims in Slovenia form a distinct group of Muslims in Europe, characterised by a common history, cultural similarities, language and educational structures. The article presents a newly formulated typology that divides Muslims in Slovenia into consistent, cultural and marginal believers.

Keywords: typology of Muslims in Slovenia, integration, Islam in Europe, Islam in Slovenia

1. Uvod

Raziskava slovenskega javnega mnenja iz leta 2022 je pokazala, da se za muslimane opredeljuje 5 % Slovencev. (SJM 22/2) Evropski raziskovalni center Pew Research (2015) napoveduje, da se bo do leta 2050 število muslimanov in kristjanov v

[1] Prispevek je nastal v okviru raziskovalnega programa „Religija, etika, edukacija in izzivi sodobne družbe (P6-0269)“, ki ga sofinancira Javna agencija za znanstvenoraziskovalno in inovacijsko dejavnost Republike Slovenije (ARIS).

Evropi izenačilo. Pričakujemo lahko, da bo število muslimanov v naslednjih letih naraščalo tudi Sloveniji. »Projekcije kažejo, da bo okoli leta 2100 v Sloveniji le še pol prebivalcev Slovencev.« (Gams in Osredkar 2021, 560)

V Evropi živi 6 % muslimanov, ki jih lahko razdelimo na dve skupini: avtohtone muslimane in priseljence. Prvi živijo na območjih Vzhodne Evrope in Balkanskega polotoka, kamor je islam iz Azije prodrl že pred več stoletji. Evropska država z največjim deležem muslimanov (93,5 %) je Kosovo. Sledijo mu Albanija (80,3 %), Bosna in Hercegovina (50,7 %), Severna Makedonija (33,2 %), Črna gora (19,11 %) (Alibašić idr. 2024). Na vzhod Evrope, kamor je v 13. stoletju vdrla mongolska zlata horda in pustošila ozemlje ob Volgi, Krimu in Kavkazu, so islam prinesli spreobrnjeni poganski Mongoli. Krimski kanat (obsegal je del današnje Rusije, Ukrajine in Moldavije) je bil ustanovljen leta 1449. Približno trideset let (1478) za tem so ga zavzeli Osmani. Leta 1774 je po rusko-turški vojni in podpisu kučukkajnardžijskega miru postal samostojen, leta 1783 pa je bil tudi uradno priključen k Ruskemu imperiju in postal Tavriška gubernija. Ko govorimo o avtohtonih evropskih muslimanih, ne moremo mimo Turkov. Turčija je geografsko razdeljena na evropski in azijski del. Z osmanskimi osvajanji se je na območje jugovzhodne Evrope širil ravno »turški islam«, ki so mu spreobrnjeni prebivalci Balkana dodali svoj pečat s prepletanjem islamske verske prakse in ljudskih šeg.

Drugo skupino evropskih muslimanov predstavljajo migranti iz neevropskih držav in njihovi potomci. Največ jih je v Franciji, Belgiji, Veliki Britaniji in na Nizozemskem. Od neavtohtonih evropskih muslimanskih držav so glede na število prebivalcev države z največjim odstotkom muslimanov Francija, Belgija in Švedska (8 %). Sledijo Nemčija (6,7 %), Velika Britanija (6,5 %), Švica (5,7 %), Nizozemska (4,6 %), in Avstrija (4,2 %) (Alibašić idr. 2024). V omenjenih državah živijo zunanji in notranji migranti. Med notranje migracije prištevamo selitve znotraj evropskih držav, pri čemer imamo v mislih predvsem muslimane z Balkana, ki so se kot delovni migranti in vojni begunci odločili za selitev v gospodarsko močnejše države. Iz istih razlogov se v Evropo priseljujejo muslimani iz Afrike in Azije. Na britanskem otočju tako prevladujejo muslimani iz Pakistana, v Franciji in Beneluksu iz Alžirije, Maroka in Tunizije ter Bližnjega vzhoda, medtem ko je v Nemčiji največ muslimanov Turkov, ki bi jih lahko prištevali tudi k notranjim migrantom. Zunanji in notranji muslimanski priseljenci se ne razlikujejo zgolj po etničnosti, ampak tudi po kulturi in načinu življenja. Drugačna je tudi njihova verska praksa, ki je odvisna od pravne šole in kulture, značilne za določeno geografsko okolje. Priseljenci iz Severne Afrike prinašajo s seboj malikijsko versko prakso, iz Irana prihajajo šiiti. Zunanji migranti se zaradi večjih kulturnih razlik spopadajo z bistveno večjimi integracijskimi izzivi. Predvsem za prvo generacijo priseljencev je značilna segregacija, ki je posledica kulturnega šoka, žal pa tudi slabo organiziranih programov za vključevanje migrantov v novo okolje. V Evropi je močno prisotna islamofobija, ki vpliva na slabši dialog s priseljenci, s čimer je povezano tudi več kaznivih dejanj med mladimi muslimani prve in druge generacije. S takšnimi težavami se srečujejo

zlasti v Franciji, Švici in na Nizozemskem.[2] Strah pred islamsko vero in kulturo se vidno odraža tudi v javnih in političnih diskurzih. Razprave o primernosti gradnje džamije in minareta, pokrivanju muslimank in obrezovanju muslimanskih moških so prisotne tudi v Sloveniji.

Cilj prispevka je pokazati, da muslimani v Sloveniji znotraj evropskega prostora zavzemajo posebno mesto. V nadaljevanju bomo prikazali, kako se muslimani v Sloveniji razlikujejo od drugih muslimanov v Evropi. Predstavljena bo tudi tipologija religijskih praks muslimanov v Sloveniji, ki smo jo izdelali na podlagi značilnosti ali celo posebnosti muslimanov v Sloveniji.

2. Raznolikost muslimanov v Evropi

Muslimani v Evropi se med seboj (v znatni meri) razlikujejo, saj pripadajo različnim etničnim skupinam, zaznamujejo jih različne kulture predpostavke, nenazadnje pa pripadajo različnim islamskim pravnim šolam ali celo smerem. Zato je sporno v medijih pogosto preprosto enačenje vseh muslimanov in njihovo označevanje s teroristi. V Evropi najdemo tako večinske sunite kakor tudi šiite. Še vedno sicer prevladujejo suniti, ki so bili do sedemdesetih let 20. stoletja edini predstavniki islama v Evropi. Stanje se je spremenilo po iranski revoluciji (1978–1979) in sovjetsko-afganistanski vojni (1979–1989), in tako danes šiitom pripada že 26,7 % evropskih muslimanov.[3] Največ jih najdemo v Skandinaviji in baltskih državah (Scharbrodt in Shanneik 2025, 5; 11–13). K raznolikosti islama po Evropi prispeva tudi pripadnost različnim pravnim šolam znotraj obeh islamskih dominacij. Med sunitskimi pravnimi šolami v Evropi prevladuje hanifitska pravna šola, ki ji pripada vse avtohtono evropsko muslimansko prebivalstvo – s tem mislimo na muslimane, ki živijo na Balkanu in v Turčiji. Prav tako hanifitski pravni šoli pripadajo priseljenci iz južnoazijskih držav, ki se jih je največ naselilo v Združenem kraljestvu. S priseljevanjem muslimanov iz severnoafriških držav je prišla v Evropo še malikitska sunitska pravna šola, ki je danes najbolj prisotna v Franciji, državah Beneluksa in v Italiji. Najmanj muslimanov medtem sledi šafiitski (Združeno kraljestvo, Nizozemska, skandinavske države) in hanibalitski pravni šoli.

Na raznolikost muslimanov v Evropi vpliva še etnična pripadnost ter izvorno kulturno okolje priseljencev in njihovih potomcev – identiteta muslimanov v Evropi je raznolika. »Identiteto običajno razumemo kot zbir razlikovalnih značilnosti in lastnosti, ki posameznika ali skupino posameznikov opredeljujejo. Ta nabor vključuje različne vidike – vključno z osebnimi, družbenimi in kulturnimi gradniki, ki oblikujejo posameznikov občutek o sebi in njegovem mestu v svetu.« (Centa Strahovnik 2023, 854) Priseljenci ali potomci priseljencev, ki jih v večini primerov močno zaznamuje migracijska izkušnja, se pogosto soočajo z iskanjem svoje lastne identitete in občut-

[2] Na to temo je Swiss Center of Islam and Society iz Fribourga organiziral mednarodno konferenco „Islam Social Work?“, katere namen je bila predstavitev aktualnega stanja in iskanja dobrih praks za naprej.

[3] Raziskava je med evropske države prištevala tudi evrazijske države, kot so Armenija, Azerbajdžan, Gruzija in Turčija.

kom nepripadnosti. Z iskanjem identitete je povezano iskanje stika z državo izvora, ki je po besedah Voasa in Fleischmanna (2012) prisotno pri nekaterih zunanjih priseljencih druge generacije. Torrekenes in Jacobs (2015, 331) pa dodajata, da religioznost muslimanov in njihova verska praksa nista pogojeni z omejevalno politiko; tako zavračata tezo, da so bolj religiozni tisti evropski muslimani, ki živijo v državah, kjer imajo muslimani manj pravic (prim. prepoved nošenja naglavne rute v javnih prostorih), kar imenujeta omejevalna politika. Rezultati njune študije kažejo, da se večina evropskih muslimanov na omejevalno politiko države gostiteljice ne odziva z uporom, čeprav bi bilo pričakovati, da se bodo muslimani na restriktivnejšo politiko odzvali z doslednejšim izpolnjevanjem verskih predpisov; takšen primer je Švica. Njena protiutež v evropskem prostoru je Belgija, ki ji v odnosu do sprejemanja verskih ukrepov, povezanih z islamsko versko prakso, pripada status najbolj odprte evropske države. Kljub temu pa se tudi v Belgiji organizirajo skrajne islamske skupine, ki so v preteklih letih izvajale teroristične napade. Ista raziskava je še pokazala, da so balkanski muslimani najbolj sekularizirani (6) – to je sicer že leta 1993 ugotovil tudi Harry T. Norris (1993). Kljub temu pa ne moremo mimo dejstva, da na identiteto posameznika in prakticiranje islamske verske prakse vplivajo različne oblike prilagajanja (integracija, segregacija, asimilacija in medkulturnost).

Vidimo torej, da so evropski muslimani heterogeni. Poleg avtohtonih muslimanov mednje prištevamo še priseljence z Bližnjega vzhoda, osrednje Azije, Irana, s severa in drugih delov Afrike. Glede na to se razlikuje tudi njihovo kulturno ozadje in verska praksa, ki je odvisna od osebne religioznosti, naukov različnih islamskih šol in predvsem od kulturnih navad, značilnih za države izvora priseljencev in njihovih potomcev.

3. Tipologija religijskih praks muslimanov v Sloveniji

Muslimani v Sloveniji predstavljajo svojevrsten fenomen. Njihova verska praksa je raznolika. Na podlagi opravljene raziskave pritrjujemo ugotovitvam Špele Kalčić (2007, 29), ki pravi, da nekateri muslimani v Sloveniji sledijo tradicionalnemu islamu, spet drugi so pri izpolnjevanju verskih predpisov bolj ohlapni. Po njenih ugotovitvah se pripadniki obeh skupin, taborov med seboj ne družijo. Muslimani v Sloveniji večinoma sledijo sunitski hanifitski pravni šoli. V manjšini so salafiti, šiiti (večinoma priseljenci iz Irana) in sufiji oz. derviši. Izdelava tipologije, ki bi zajela vse muslimane v Sloveniji, hkrati pa upoštevala njihovo različnost, predstavlja velik izziv. Zaradi specifičnosti slovenskega okolja se je pokazala potreba po oblikovanju nove tipologije, v katero bi lahko uvrstili vse muslimane v Sloveniji.

Tako smo oblikovali tipologijo, na podlagi katere lahko muslimane v Sloveniji ob upoštevanju njihove verske prakse razdelimo v tri skupine ali kategorije:

a) dosledni verniki;

b) kulturni verniki;

c) obrobni verniki.

Skupine smo oblikovali na podlagi podobnih tipologij, ki so bile v evropskem prostoru že izdelane (Martin 2010, Ramadan 2004, Cvitković 2004), a muslimane v Sloveniji vanje težko uvrstimo. Razlog se skriva v verski in politični zgodovini muslimanov z Balkana, ki se glede izpolnjevanja verske prakse precej razlikujejo od sovernikov iz afriških in azijskih držav – ti se priseljujejo predvsem v države Zahodne, Severne in Srednje Evrope.

Pri razvrščanju v kategorije znotraj oblikovane tipologije smo upoštevali dve merili, in sicer upoštevanje verskih predpisov in izražanje religioznosti v vsakdanjem življenju, obenem pa tudi kulturni vidik islama pri muslimanih v Sloveniji – tj. kako se islamska kultura izraža v vsakdanjem življenju slovenskih muslimanov (navade, način življenja, praznovanje praznikov itn.).

Še najbolj primerna tipologija vernikov in njihovih karakteristik, na katero bi se lahko naslonili, je tipologija Ivana Cvitkovića (2004, 133), po kateri vernike (muslimane in kristjane) uvršča v štiri skupine. Prvo skupino predstavljajo prepričani verniki (bos. *uvjereni vjernici*), sledijo jim navadni verniki (bos. *obični vjernici*), nominalni verniki (bos. *nominalni vjernici*) in statični verniki (bos. *statični vjernici*).

Med dosledne vernike prištevamo tiste muslimane, ki dosledno izpolnjujejo verske predpise. Članstvo v muslimanskih verskih skupnostih ni pogoj, saj se lahko vernik drži vseh predpisov in prihaja na skupinske verske obrede tudi, kadar nima urejenega članstva. Dosledni verniki sledijo hanifitski ali salafitski pravni šoli, med njimi pa obstajajo pomembne razlike. Salafiti so občutno bolj strogi pri izpolnjevanju verskih predpisov kot večina preostalih muslimanov v Sloveniji, kar je posledica drugačnega razumevanja in interpretacije islamskih predpisov. To se še posebej kaže pri doslednem, pogosto tudi togem upoštevanju predpisov, vezanih na versko prakso. Za vse muslimane, ki jih prištevamo med dosledne vernike, je značilna redna molitev, vsaj občasno obiskovanje verskih obredov (pri moških vsak petek, ko je to izvedljivo), želja po odpravi na zapovedano romanje ali že opravljeno romanje, dajanje miloščine (*zekat*), upoštevanje *halal* predpisov prehranjevanja, dosledno obhajanje verskih praznikov in ohranjanje muslimanske tradicije. Dosledni verniki oblikujejo svoja moralna stališča na podlagi islamskega učenja. Tako nasprotujejo splavu, evtanaziji in se v svojem življenju poskušajo držati verskih vrednot.

Nakazali smo že, da prihaja med doslednimi verniki do določenih razhajanj, ki so povezana s sledenjem različnim pravnim šolam. Salafiti se verskih predpisov držijo do črke natančno in hanifitskim muslimanom očitajo nedoslednost. To lahko pokažemo na primerih – za salafite je prestavljanje molitve nesprejemljivo, hanifitski muslimani v tem ne vidijo nikakršne težave. Prav tako salafiti uživajo le prehrano, ki ima *halal* certifikat, in so zelo pozorni na njen izvor, kar za hanifitske muslimane ni značilno. Po drugi stani salafiti nasprotujejo vsem običajem, ki so

del tradicije bosanskega islama (prim. *mevludi*[4], *dovište*[5]). Hanifitski muslimani svoje verske pripadnosti ne izražajo z oblačilnimi praksami (z izjemo imamove obredne obleke), a določene muslimanke z naglavno ruto so pokrite. Če je za salafite značilna kulturna segregacija, pa so dosledni hanifitski muslimani v večini primerov v slovensko okolje kulturno dobro integrirani in so odprti za graditev medkulturnega in medreligijskega dialoga.

Drugo skupino predstavljajo kulturni verniki oz. kulturni muslimani. Gre za versko neopazne posameznike, ki se z vero poistovetijo zaradi družinske tradicije, osebne izkušnje, kakor tudi socialnega in kulturnega okolja, v katerem so odraščali. So pripadniki hanifitske pravne šole, nekateri izmed njih so obiskovali islamski verski pouk *(mekteb*) in so včlanjeni v Islamsko skupnost ali Slovensko muslimansko skupnost. Od doslednih vernikov jih ločuje zlasti manj dosledno izpolnjevanje verskih predpisov. V primerjavi z doslednimi verniki molijo manj pogosto, posta se ne držijo oz. se postijo manjši del obdobja, in še to bolj zaradi tradicije kot duhovnega pomena. Prav tako so manj dosledni pri izpolnjevanju predpisov *halal* prehranjevanja; nekateri celo jedo svinjino ali/in pijejo alkohol. Večina muslimank iz te skupine se pokriva le ob molitvi in posameznih priložnostih (prim. verska poroka). Druge naglavno ruto nosijo redno, a je na njihovo odločitev v večji meri vplivala tradicija in želja po izkazovanju identitete – manj pa želja po doslednejšem izpolnjevanju verskih predpisov. Za kulturne muslimane je sicer značilno redno praznovanje islamskih praznikov, ki jim pomenijo stik z domovino in domačo tradicijo. Religija je zanje bolj ali manj zasebna stvar, ki jo živijo znotraj doma, v javnosti pa svoje verske pripadnosti ne izpostavljajo. Pri tem so seveda izjema pokrite muslimanke. Med kulturnimi verniki opažamo tako integracijo kakor tudi delno asimilacijo in segregacijo.

Zadnjo skupino sestavljajo obrobni verniki, pri katerih je verska praksa zelo šibka oz. skorajda neobstoječa. Martin (2010, 131) takšne muslimane imenuje tudi sekularizirani muslimani, ki ne izpolnjujejo verskih predpisov – ne molijo ali molijo zelo redko, ne berejo svetih spisov, ne obiskujejo verskih obredov (izjema so posebne priložnosti, kot so pogreb, poroka znanca itn.), ne hodijo na romanja in se ne držijo predpisov prehranjevanja. O vsakdanjih stvareh razmišljajo na povsem sekularen način. V njihovem načinu razmišljanja in delovanja je torej prisotna individualna in liberalna drža. Nekateri od njih se imajo celo za ateiste in agnostike, njihova muslimanska identiteta[6] pa temelji zgolj na družinski tradiciji in etnični pripadnosti. Za obrobne muslimane je značilno individualistično verovanje. Upoštevajo tisto, kar jim je všeč, preostalo opuščajo. Njihovi pogledi na moralna vprašanja se v večini primerov razlikujejo od islamskega učenja in spominjajo na učenje liberalizma.

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[4] *Mevludi* v bosanski tradiciji predstavljajo recitiranje nabožnih besedil. Recitiranje *mevluda* je prisotno ob rojstvu otroka, vselitvi v novi dom, odhodu v vojsko, smrti in ob drugih pomembnih življenjskih dogodkih.

[5] *Dovište* so priprošnje, kratke molitve k Bogu (prim. *dovišta* za obvarovanje pred naravnimi nesrečami).

[6] Osredkar (2023, 931) trdi, da »nobena ustanova, noben urad ne more skupini ljudi potrditi religijske identitete. Samo medreligijski dialog ima funkcijo priznavanja, da je neka skupnost zares verska skupnost, in samo medreligijski dialog ima ‚sposobnost' podeljevanja religijske identitete.«

Na koncu predstavljene tipologije muslimanov v Sloveniji je treba poudariti, da si pripadniki znotraj določenih skupin niso popolnoma enaki in da vedno obstajajo tudi izjeme. Tako lahko pokrita muslimanka ne moli petkrat na dan in se ne posti. Seveda velja tudi obratno.

Raziskava[7] verske prakse muslimanov v Sloveniji (izvedena v letih 2020–2021) je pokazala, da je največ muslimanov v Sloveniji kulturnih vernikov. Obrobni in dosledni muslimani zajemajo podoben (manjši) delež.

4. Posebnosti muslimanov v Sloveniji

Z oblikovanjem tipologije, ki smo jo izdelali na podlagi izpolnjevanja in opuščanja verske prakse pri muslimanih v Sloveniji ter poglobljenega študija muslimanov na Balkanu in v drugih evropskih državah, smo ugotovili, da muslimanov v Sloveniji ne moremo enačiti z drugimi evropskimi muslimani – niti ne z muslimani, ki živijo v Bosni in Hercegovini, Kosovu, Albaniji, Sandžaku, Severni Makedoniji in Črni gori. V nadaljevanju bomo poskušali prikazati podobo muslimana v Sloveniji v odnosu do drugih evropskih muslimanov, tudi Bošnjakov v Nemčiji in Avstriji.

Kar se tiče prakticiranja vere med muslimani v Sloveniji ter balkanskimi migranti islamske veroizpovedi in njihovimi potomci v drugih evropskih državah, smo lahko ugotovili precejšnje podobnosti. Haug (idr. 2009) ugotavlja, da so balkanski muslimani druga najbolj sekularizirana muslimanska skupina v Nemčiji – manj dosledni izpolnjevalci verske prakse so le priseljenci iz Irana. Muslimani z Balkana namreč redko molijo, še redkeje so včlanjujejo v verske skupnosti. Udeležba žensk pri skupnih verskih obredih ni običajna. Najbolj dosledni so pri upoštevanju prehranjevalnih predpisov in postu, ki pa ga polovica prakticira le zadnji del postnega obdobja. Velike podobnosti glede verske prakse in vključevanja v družbo ugotavljamo tudi za muslimane z Balkanskega polotoka, ki so migrirali v Avstrijo (Kolb in Yildiz 2019).

Za balkanske muslimane v Nemčiji in Avstriji je glede upoštevanja verskih predpisov in norm značilna individualna in samoodločajoča religioznost ter zavračanje navezave na stroga pravila in dolžnosti. Svoje versko življenje udejanjajo v skladu z individualno potrebo posameznika, z željo, da bi bili Bogu blizu. Molitev ob predpisanem času ni v navadi. Individualna religioznost je še posebej značilna za drugo generacijo in nadaljnje potomce migrantov, kar je v nasprotju z ugotovitvami raziskav med potomci muslimanskih migrantov iz afriških in azijskih držav (Voas in Fleischmann 2012, 534). Opazno je, da je odprta religioznost moralno-tradicionalno manj dosledna, kar se v praksi kaže kot odobravanje spolnosti pred poroko, splava in evtanazije ter raba kontracepcije. Odprta religioznost temelji na potrebah posameznika in je po besedah Kolba in Yildiza (2019, 8; 13) tista, h kateri bodo prihodnje generacije potomcev priseljencev najbolj težile. Omenjena avtorja (3) dodajata, da je za prvo generacijo muslimanskih priseljencev v Avstriji zna-

[7] Raziskavo je opravila avtorica članka za namen doktorske disertacije.

čilna obrambna religioznost, ki ima izvor v strahu pred izgubo osebne identitete in odtujitvijo od lastnih korenin v tujem okolju. Za naslednje generacije priseljencev je medtem značilna precejšnja integracija, ponekod tudi asimilacija, a priseljenska izkušnja ostaja vidna. Naša raziskava nakazuje, da podobno velja tudi za ‚slovenske muslimane' – rojene v Sloveniji.

V čem pa so muslimani v Sloveniji drugačni od drugih evropskih in neevropskih muslimanov? Največje razlike opažamo v primerjavi z neavtohtonimi muslimanskimi priseljenci, ki izhajajo iz bistveno drugačnega kulturnega okolja. Njihova monolitna izvorna kultura otežuje njihovo integracijo v novo okolje. Nekaterim integracija predstavlja izziv, drugi se v novo okolje niti ne želijo vključiti. Posledično prihaja do množične segregacije muslimanov, ki pa je v Sloveniji manj prisotna.

V Sloveniji si Islamska skupnost v Republiki Sloveniji in Slovenska muslimanska skupnost prizadevata za dobre odnose z državnimi organi; mlade spodbujata, naj se v slovensko okolje vključijo in aktivno sodelujejo pri oblikovanju slovenske družbe, čeprav pri tem večkrat naletijo na prepreke, ki so občasno povezane celo z islamofobijo.

Muslimanov v Sloveniji prav tako ne moremo v polni meri enačiti s priseljenci z Balkana v drugih evropskih državah. Prva razlika med muslimanskimi priseljenci z Balkana v Nemčiji, Avstriji in na Švedskem in po drugi strani v Sloveniji je jezik – prvi element ali celo sredstvo, s katerim priseljenci vstopijo v stik z drugim, drugačnim. Tudi v primeru nepoznavanja ali slabšega poznavanja slovenščine komunikacija je možna, saj je poznavanje ‚srbohrvaščine' v Sloveniji dobro, poleg tega obstaja medsebojna razumljivost s slovenščino. Izjema so albansko govoreči priseljenci, ki se posledično integrirajo precej težje. Druga močna povezovalna točka je večdesetletno življenje v skupni državi in skupna izkušnja socialističnega sistema. Namerno izpodrivanje vere s področja javnega življenja je pustilo posledice tako v Sloveniji kot v drugih balkanskih državah. Spomin na socialistični sistem in nekatere stranpoti, ki so se dogajale, ostaja zapisan v zgodovino vseh nekdanjih jugoslovanskih narodov, pa tudi Albancev. Po drugi strani je možno opaziti tudi jugonostalgijo, saj je nekdanji politični sistem v spominu nekaterih bolj pozitiven kot negativen. Velikonja (2008) govori tudi o ‚titostalgiji'.

Slovenija je v primerjavi z drugimi najbolj sekularizirana balkanska država (Crabtree 2010); v njej ni prišlo do pojava, ki bi ga lahko enačili z reislamizacijo v Bosni in Hercegovini, Albaniji, Severni Makedoniji in na Kosovu. Znotraj Socialistične federativne republike Jugoslavije je bila Slovenija gospodarsko najbolj razvita država, ki se je tudi po razpadu Avstro-Ogrske ozirala za njo in sledila zahodnim idejam. Višja stopnja sekulariziranosti slovenske družbe je tako povezana z višjo stopnjo modernizacije. Po drugi strani pa je desekularizacija na Balkanu povezana z ovrednotenjem etničnih identitet. Etnični boj v devetdesetih letih je namreč privedel do dveh vojn na Balkanu – etnična identiteta Bošnjakov v Bosni in Hercegovini ter Albancev na Kosovu pa je bila od vsega začetka tesno povezana z versko identiteto.

Muslimani v Sloveniji bi lahko bili še najbolj podobni muslimanom na Hrvaškem, saj gre za priseljence istih etničnih skupin, primerljivo je tudi zgodovinsko ozadje.

A tudi tu obstajajo pomembne razlike. Najbolj izstopajoča je izobrazba in možnost islamskega izobraževanja. V Slovenijo se priseljuje predvsem delavski razred z nižjo stopnjo izobrazbe, medtem ko na Hrvaškem najdemo višje izobražene muslimane, ki so se v Zagreb, Reko in druge večje hrvaške kraje priselili v želji po nadgradnji svoje izobrazbe (Grabus 2011). Muslimani z višjo izobrazbo so v večini primerov tudi versko bolje izobraženi, kar se lahko vpliva tudi na bolj dosledno izpolnjevanje verskih predpisov – čeprav sociološko gledano velja prej obratno. Hkrati pa jim verska izobrazba pomaga pri lažjem prenosu vere na mlajše generacije.

Omenimo še, da so potomci muslimanskih priseljencev v Sloveniji bolje izobraženi in tako predstavljajo upanje za razvoj islama v Sloveniji. Je pa treba opozoriti, da se jih le malo angažira in vključi v delovanje verske skupnosti. Opažamo celo, da gre za izrazito individualizirane vernike, ki se z delovanjem muslimanskih verskih skupnosti v številnih pogledih ne strinjajo – ali pa jih njihovo delovanje niti ne zanima. Individualizacija vere, značilna za sekularno družbo, je pri muslimanih v Sloveniji močno prisotna. Dostopnost različne literature in drugih verskih vsebin vernikom omogoča, da se versko izobražujejo sami. Pozitivna plat je boljše poznavanje islama, pri čemer vendarle obstaja nevarnost ‚napačnih' interpretacij in verskega selektivizma – vzamem tisto, kar mi ustreza. To se pozna predvsem pri izpolnjevanju predpisov zapovedane verske prakse. Prestavitev, opustitev ali združitev petdnevne molitve za večino muslimanov v Sloveniji ne predstavlja težave. Še manj dosledni so pri obiskovanju verskih obredov, pri čemer prevladuje miselnost, da islam teži k temu, da je vsak človek dober vernik in da svoje ‚vernosti' ni treba razkazovati.

Zdi se, da so muslimani v Sloveniji po verski praksi precej podobni balkanskim muslimanom v drugih evropskih državah. Drži, da je glede upoštevanja verskih predpisov in norm za oboje značilna individualna in samoodločajoča religioznost ter zavračanje vezave na stroga pravila in dolžnosti. Svoje versko življenje udejanjajo v skladu z individualno potrebo posameznika, in sicer z željo po božji bližini. Molitev ob predpisanem času ni v navadi. Individualna religioznost je še posebej značilna za potomce priseljencev. Podobna spoznanja veljajo tudi za ‚naše' muslimane od druge generacije naprej.

Posebnost muslimanov v Sloveniji v primerjavi z Bošnjaki v drugih evropskih državah je v etnični in jezikovni podobnosti s Slovenci (slovanske korenine) in v življenju pod socializmom v času Jugoslavije. Preseljevalni šok je bil tako manjši, možnost integracije večja. Vseeno pa je tudi muslimane v Sloveniji zaznamovala priseljenska izkušnja in islamofobično okolje, na kar nakazuje tudi naša raziskava (identificiranje ene osebe z dvema nacionalnima identitetama – Bošnjak in Slovenec). Muslimani v Sloveniji (z izjemo salafitov) ne želijo izstopati. Pravijo, da se v medijskih opisih, ki muslimane prikazujejo kot verske fanatike in teroriste, ne prepoznajo. Slednje celo obsojajo. Kljub temu pa se kot muslimani občasno počutijo stigmatizirani.

V Sloveniji poleg Bošnjakov živijo še muslimani iz Sandžaka, Črne gore, Severne Makedonije, Kosova in Albanije. Slednji se v zadnjem desetletju priseljujejo v večjem številu, zaradi česar je primerno, da nekaj besed namenimo tudi njim – in muslimanom iz Severne Makedonije.

5. Segregacija albanskih muslimanov v Sloveniji

Albanski muslimani se od Bošnjakov razlikujejo po etnični pripadnosti, saj so potomci Ilirov. Osmanska islamizacija Albancev se je začela konec 14. stoletja, in sicer po kosovski bitki. Prvi so se spreobrnili aristokrati,[8] kar je spodbudilo prostovoljno spreobračanje v islam, predvsem zaradi različnih ugodnosti, ki so jih bili muslimani deležni (Zefi 2006). Muslimani v Albaniji in na Kosovu predstavljajo večino prebivalstva, kar kaže, da so islam za svojo vero sprejeli skorajda vsi kristjani, ki so živeli na tistem območju.[9] Albanski muslimani imajo evropsko identiteto, za mlajše generacije je značilno spogledovanje z Zahodom. Njihova verska identiteta je zmerna. Med kosovsko vojno (1998–1999) je religijsko identiteto nadomeščala nacionalnost. Posledično se albanski muslimani niso počutili del svetovne islamske skupnosti (*umme*), saj je bilo znotraj njihovega okolja za sobivanje in religijski dialog dovolj prostora. Islam v Albaniji je v dobršni meri zaznamoval strog socialistični sistem (1944–1991) z neusmiljenimi kaznimi za tiste, ki so religijsko prepričanje izkazovali v javnosti. Albanska in kosovska zakonodaja sta prav tako sekularni.

Raziskave kažejo, da se je verska praksa albanskih muslimanov okrepila po letu 1992. Za muslimanke s Kosova je značilna oživitev pokrivanja, v porastu je tudi zakrivanje. A Blumi in Krasniqi (2015, 481) menita, da mladim osnove islamske verske prakse niso znane. Po kosovski vojni so na Kosovo in v Albanijo začeli prihajati tudi salafiti, ki so denar vlagali predvsem v obnovo v vojni porušenih verskih in kulturnih objektov. S salafiti simpatizira in jim sledi le malo albanskih muslimanov, drugi se od njih namerno distancirajo. Vseeno pa je treba omeniti, da salafiti so pustili svoj pečat, ki se navzven kaže predvsem s povečanim zakrivanjem Albank.

V Albaniji in na Kosovu delujejo različne muslimanske skupine (suniti, bektaši (sufiji),[10] Torbeši[11], salafiti). Prelomnica znotraj verske organizacije muslimanov na Kosovu in Severni Makedoniji se je zgodila leta 1992, ko so se odcepili od sarajevskega rijaseta. Na versko prakso muslimanov na Kosovu je vplivalo tudi prepletanje verske prakse s sufizmom in odkrito upiranje sunitski ortodoksiji (Blumi in Krasniqi 2015, 486). Spregledati ne smemo niti dejstva, da je za Bektaše značilno zanemarjanje islamskih bogoslužnih dolžnosti, še posebej molitve (480). Tudi drugi albanski muslimani pri izpolnjevanju verskih dolžnosti niso najbolj dosledni. Raziskava Westroffa in Frejka (2007) je celo pokazala, da so muslimanke iz Alba-

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8 Za ohranitev albanske nacionalne identitete naj bi bili zaslužni katoličani, ki se po besedah Zefija (2006) niso ločili od evropske krščanske tradicije. Nacionalna identiteta Albancev se je oblikovala predvsem s pomočjo jezika, ki jih je ločeval od vseh sosedov.

9 Zaradi želje po boljšem življenju so krščanski prebivalci pod Osmani otrokom dajali istočasno tako krščansko kot muslimansko ime, fantke so začeli obrezovati, uživali pa so alkohol. V Cerkev niso zahajali. Imenovali so se seljaramani, nekateri so jih imenovali tudi kriptokatoliki in kriptopravoslavci (Horvat 1989, 53–54).

10 Halvati, kadari in bektaši. Slednji so turški derviški red, ki ga je v 13. stoletju ustanovil Veli Bektaš, v Sloveniji bolj poznan kot Hadši Bektaš. Poudarek je na češčenju Alija, prav tako poznajo spovedovanje za grehe in pokoro, kar za islam sicer ni značilno. V verskih obredih sodelujejo tudi ženske, ki se ne pokrivajo.

11 Torbeši so makedonsko govoreča muslimanska etnoreligiozna skupina v Republiki Severni Makedoniji in Albaniji. Imenujejo se tudi makedonski muslimani.

nije manj religiozne kot druge evropske muslimanske. Prav tako so Albanski muslimani so manj dosledni pri izpolnjevanju prehranjevalnih predpisov; predvsem je zanje značilno pitje alkohola. V času ramazana se redki redno postijo. Na Kosovu sta državna praznika le ramazan in kurban bajram, prerokovo rojstvo pa praznujejo le redki (Hamiti 2010).

6. Nevidni makedonski Torbeši

Muslimani iz Severne Makedonije predstavljajo manjšino tako na Balkanu kakor tudi v Sloveniji. Večinsko pripadajo Torbešom, etnično nepriznani skupini. Izraz Makedonec je pogosto rezerviran za pravoslavne vernike, zaradi česar se Torbeši najpogosteje opredeljujejo kot makedonski muslimani ali kot slovansko govoreči muslimani (Zemon 2012). Makedonski muslimani so ‚potomci' osmanskega islama, prvine katerega so v njihovi verski praksi vidne še danes. Zadrožna (2013, 38) omenja, da se zdi makedonskim muslimanom turški islam boljši od drugih, saj je odprt za sekularno delitev države in religije, posledično pa je tudi bolj moderen.

Verska praksa Torbešev je podobna drugim balkanskim muslimanom – pokrivajo se le redke ženske, nošenje nikaba in burke pogosto kritizirajo (40). Ženske se brez sramu oblečejo v bikini in zapeljiva oblačila. Anna Zadrožna (41) je med raziskavo ugotovila, da večina makedonskih muslimanov Korana in hadisov nikoli ni brala, a jih večina osnove islama pozna. Poznavanje arabščine je slabo. Obstajajo tudi takšni, ki sicer molijo, a se pomena svojih besed ne zavedajo. Slednje lahko pripišemo slabi verski izobrazbi. Versko življenje makedonskih muslimanov se spremeni v času ramazana, ko se večina vernikov posti, kar je značilno tudi za Bošnjake. Po drugi strani pa Zadrožna (42–43) omenja, da se je med svojim terenskim delom prvič nekoliko uštela, ko je ljudem kar verjela, da se posta držijo dosledno. Po večkratnem delu na terenu in bolj pozornem opazovanju je namreč ugotovila, da se večina makedonskih muslimanov posti iz strahu pred opravljanjem in stigmatiziranjem. Ob pozornem opazovanju je večkrat zasledila mlade muslimane, da so v času ramazana na skrivaj kadili cigarete, moški pa so pogosto hodili v večja mesta, kjer so obilno jedli in pili.

Posledice socializma so v Severni Makedoniji vidne še danes. Pitje alkohola in uživanje svinjine je za makedonske muslimane popolnoma običajna praksa (43). V času socialističnega sistema so bile razlike med muslimani in drugimi verniki izbrisane. Vse do danes se je ohranila težnja po iskanju partnerjev iste veroizpovedi, pri čemer nacionalnost nima pomembne vloge (45). K temu prispeva zlasti težnja po čim manjših kulturnih in vrednotnih razlikah, kar se še posebej odraža pri vzgoji otrok. Zadrožna (46) še ugotavlja, da so dogovorjene poroke bolj izjema kot pravilo.

7. Zaključek

Po kratkem pregledu verske prakse avtohtonih balkanskih muslimanov vidimo, da je njihova verska praksa ohlapna in večinoma povsem podobna verski praksi sodobnega Evropejca. Za avtohtone evropske muslimane je značilna individualizacija religije in sledenje razsvetljenskim idejam ter vrednotam, kar je vidno tudi pri muslimanih v Sloveniji. Ti so sicer v primerjavi z balkanskimi migranti islamske veroizpovedi v drugih evropskih državah bolje integrirani, kar lahko pripisujemo skupni zgodovini in slovanskim koreninam. Muslimane v Sloveniji lahko še najbolj primerjamo z muslimani na Hrvaškem, ki pa so v primerjavi s slovenskimi muslimani (predvsem prvo generacijo) višje strokovno in versko izobraženi, kar se kaže v drugačnem pogledu na svet, pa tudi v razumevanju vere in verski praksi. Prenos verske prakse na naslednje generacije je bolj uspešen v primeru podajanja ustreznih razlag in utemeljevanj. Generacij, odraščajočih v 21. stoletju, ne zadovoljijo več odgovori, da je nekaj dobro zato, ker so tako počele generacije prednikov. Na podlagi tega tudi predpostavljamo, da se bodo (pri muslimanih in vseh preostalih religijah) ohranile tiste verske prakse, ki se bodo mlajšim generacijam zdele smiselne in razumske; verske predpise bodo izpolnjevali tisti mladi, ki bodo od svojih staršev in verskih voditeljev dobili dovolj tehtno razlago, zakaj je izpolnjevanje določenih verskih dolžnosti zanje dobro, če ne celo koristno – hkrati pa bodo te razlage tudi ponotranjili.

Pričakujemo lahko, da bodo v Sloveniji tudi v prihodnjih letih prevladovali kulturni verniki. Opazen je nizek porast salafitov in s tem nekolikšna krepitev doslednih vernikov, a slednji so predvsem zaradi svojega izstopanja bolj vidni kot pa množični. Očitno je, da se s sekularizacijo srečujejo tudi muslimani v Sloveniji. Vse več muslimanov v Sloveniji je asimiliranih, kar jih v tipologiji uvršča k obrobnim vernikom. Glede na to, da ima pri predajanju verske tradicije pomembno vlogo okolje, v katerem človek odrašča, večjih sprememb v naslednjih letih verjetno ne bo. Ob tem pa vsekakor ne smemo zanemariti velikega vpliva propagande islamske kulture na družbenih omrežjih, ki dosega tudi nekatere slovenske muslimane (predvsem predstavnike mlajše generacije) – ti se odločajo za doslednejše izpolnjevanje islamskih verskih predpisov.

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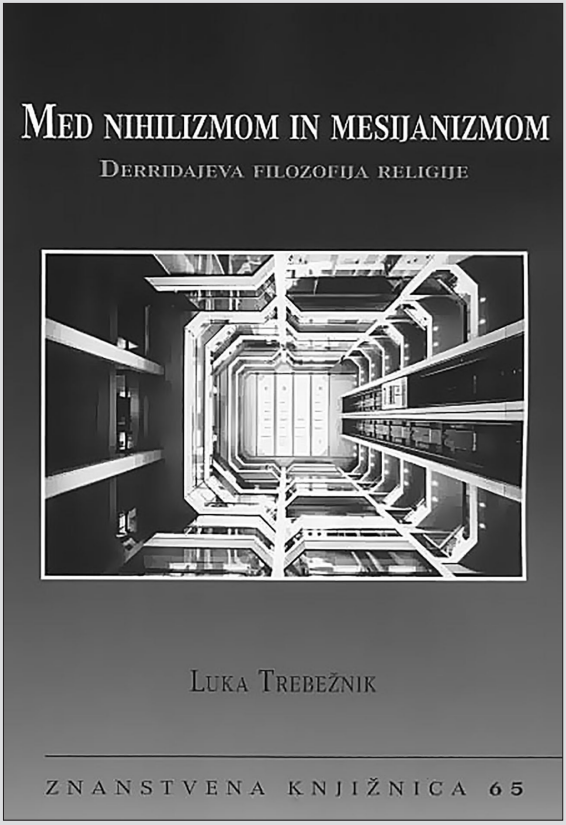

Luka Trebežnik

Med nihilizmom in mesijanizmom: Derridajeva filozofija religije

Derridaju nikakor ne gre za zavračanje obstoja resnice, temveč gre le za sporočilo, da ta nastopa preko razlike. Dekonstrukcija trdi, da ne obstaja zunaj teksta, kar pomeni, da ne obstaja večna resnica. Temu je tako, ker je sleherna resnica inkarnirana v jezik in pripoved. Ta Derridajeva stališča pa so v veliki meri nasprotna tradiciji, ki veruje, da se za tekstom nahaja trden in nesporen smisel. Izmed vsega slovstva je to najočitneje izraženo pri religijah, ki sprejemajo nadnaravni izvor svojih tekstov. Od to sledi, da sta dekonstrukcija in teologija izvorno nerazdružljivi.

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Wiesław Przygoda

Youth Ministry Renewal Guidelines in the Context of the Process of Secularisation in Europe

Smernice za obnovo mladinske pastorale v kontekstu procesa sekularizacije v Evropi

Abstract: Secularisation, coupled with the forces of globalisation, cultural revolution, individualism, subjectivism, moral relativism, and the pervasive impact of modern information and communication technologies, continues to exert significant influence on the religious landscape, particularly among the younger generation in Euro-Atlantic civilisation. This article initially presents a synthetic characterisation of the religiosity of contemporary youth in Europe. The main purpose of our inquiry is the exploration of potentials for revitalising youth pastoral care, which must grapple with the influence of secularisation and its detrimental impact on Christian faith. Our investigation hinges on the following elements proposed for the renewal of youth pastoral care: a) revival of (pre)-evangelisation; b) active participation in building the Church community; c) fostering social involvement through engagement in the Church's apostolate; and d) adopting new language and communication forms that resonate with the contemporary youth. To conduct this pastoral-theological analysis, we draw upon the findings of social research on the religiosity of youth, correlating these insights with the current teachings of the Catholic Church. Additionally, we integrate emerging ideas from the public discourse aimed at enhancing youth pastoral care. The ultimate objective is to provide actionable insights for developing an effective response to the challenges posed by secularisation, thereby nurturing and preserving the Christian faith among the younger generation.

Keywords: secularisation, youth, youth ministry, evangelisation, social apostolate

Povzetek: Sekularizacija – skupaj s silami globalizacije, kulturne revolucije, individualizma, subjektivizma, moralnega relativizma ter vseprisotnega vpliva sodobnih informacijskih in komunikacijskih tehnologij – vseskozi pomembno vpliva na versko krajino, zlasti med mlajšo generacijo v zahodni civilizaciji. Prispevek v uvodu povzema bistvene značilnosti religioznosti pri sodobni evropski mladini. Glavni namen je raziskovanje potencialov za oživitev pastorale mladih, ki naj se spopade z vplivom sekularizacije in njenim neugodnim vplivom na krščansko vero. Raziskava se osredotoča na naslednje elemente, ki jih predlagamo za ob-

novo pastorale mladih: a) oživitev (pred)evangelizacije; b) aktivno sodelovanje pri gradnji cerkvene skupnosti; c) spodbujanje družbene vključenosti z vključevanjem v apostolat Cerkve; d) sprejemanje novih jezikovnih in komunikacijskih oblik, ki nagovarjajo sodobno mladino. Za izvedbo pastoralno-teološke analize se opiramo na ugotovitve družboslovnih raziskav o religioznosti mladih in ta spoznanja povezujemo s trenutnimi nauki Katoliške Cerkve. Poleg tega vključujemo nove ideje iz javnega diskurza, namenjene izboljšanju pastoralne oskrbe mladih. Končni cilj je ponuditi uporabne ideje za razvoj učinkovitega odziva na izzive, ki jih predstavlja sekularizacija, s čimer krepimo in ohranjamo krščansko vero med mlajšo generacijo.

Ključne besede: sekularizacija, mladina, mladinska pastorala, evangelizacija, družbeni apostolat

1. Introduction

Secularisation, combined with the forces of globalisation, cultural revolution, individualism, subjectivism, moral relativism and modern information and communication technologies, is having a significant impact on the religious landscape, especially among the younger generation in Euro-Atlantic civilisation. While the roots of secularisation date back to the late Middle Ages, its intensification came with the philosophical currents of the Age of Enlightenment, while the acceleration of this social process is linked to the transformative cultural changes brought about by the sexual revolution initiated in the 1960s and continuing to the present.

There is no ubiquitous definition of secularisation that is accepted by researchers. José Casanova distinguishes between "secular", "secularisation", and "secularism" depending on the scientific discipline, as well as the social and political context. The "secular" has become a central modern category – theologico-philosophical, legal-political, and cultural-anthropological – to construct, codify, grasp, and experience a realm or reality differentiated from "the religious." Phenomenologically, one can explore the different types of "secularities" as they are codified, institutionalised, and experienced in various modern contexts and the parallel and correlated transformations of modern "religiosities" and "spiritualities." By contrast, "secularisation" is a social process that involves the separation of the secular sphere from religious institutions and norms; the decline of interest in religious beliefs and practices in society; and the marginalisation of religion into the private sphere. In contrast, "secularism" is a social phenomenon controlled by anti-religious ideologues attempting to accelerate the natural process of secularisation. Secularism becomes dangerous when it is treated as a tool of legal oppression of God-believing citizens by politicians in power who are hostile to religion. (Casanova 2009, 1050–1051)

Jörg Stolz, in his address to members of the International Society for the Sociology of Religion in 2020, expressed that sociological research, after the "neoclassical phase" of the secularization debate, which he dates to 1960–1985 (discussi-

on of abstract concepts), and a "contentious phase" dating from 1986–2000 (empirical testing of theories), had moved into a phase with the turn of the millennium (after 2000), in which there was a consensus among sociologists that, having passed through a "fuzzy phase," religion was now in general decline. According to Stolz, the modern understanding of the secularisation paradigm "is not so different from the neoclassical version of secularisation theory – but its mechanisms are better defined, and many of its elements have been empirically tested" (Stolz 2020, 300). Most sociologists agree that modernisation creates problems for religion, but there is still no answer to the question of how it happens and why it happens. One of the most plausible answers to the question of why religion is weakening is the emergence of secular competition (Voas 2020, 327).

The propagation of secularisation in modern society is undeniable. Ultimately, the aim is to derive why secularisation is taking place, when it is taking place and where it is taking place and, once these basic parameters regarding secularisation have been defined, to determine which aspects of modernisation have the greatest impact on the weakening of religious attitudes, especially the religious attitudes of young people.

2. Background and Method

Citing the teachings of the Second Vatican Council, Pope John Paul II called young people the hope of the Church and urged them to take up the Church's mission to build a better world (John Paul II 1985, 15–16). Starting from the above assumption, we want to present the current picture of youth religiosity in Europe obtained based on social research reports conducted in the last decade (Pew Research Center 2017, 2018a; 2018b; Bullivant 2018; Deželan and Lavrič 2021; Szymczak and Adamczyk 2022). Starting from a critical analysis of data from the social sciences, we intend to derive conclusions and identify pastoral postulates aimed at providing an adequate response to the pervasive propagation of secularism for those responsible for the religious formation of young people – especially parents, educators, catechists, teachers and parish pastors. It should be noted that the reported proposals for changes in youth ministry do not cover all possible facets of this vast issue. On the other hand, the symptoms of changes in the religiosity of the current generation of young people necessitate directions for adequate pastoral intervention, which is taken into account in the adopted structure of this study.

3. The Current State of Youth Religiosity in Europe

Sociological studies carried out in the West in the 21st century have confirmed that modernisation leads to more existential security, more education, more pluralism and more secular competition, which reduces religious socialisation and the availability of children for religious socialisation (Stolz 2020, 299–300). These are

the main underpinnings of the "cohort replacement theory", according to which successive generations are increasingly disconnected from religion, mainly due to the decline of religious socialisation in increasingly secular social environments. In fact, the decline of the traditional family, based on religious marriage, is the main factor explaining the decline in religiosity, especially among young people, since the family is the main socialising factor (Pereira Coutinho and Wilkins-Laflamme 2023, 320).

The religiosity of young people in different regions of Europe varies, as research by the Pew Research Center (2017; 2018a; 2018b) has shown. The main dividing line stretches between East and West. This division is firmly rooted in history, dating back to the Western Schism of 1054. After World War II, a more important factor in this division was the domination of Eastern Europe by the Soviet Union, which resulted in a forced acceleration of secularisation in most countries in the region. The exceptions are Poland and Croatia, where resistance to communism fostered the consolidation of Catholic identity. However, this factor spontaneously receded after the political breakthrough that took place in Central and Eastern Europe after 1989. Other dividing lines of religiosity in Europe were drawn in the 16th century by the Reformation. Due to current denominational divisions, youth religiosity differs significantly between the Northern European region, dominated by Protestant religions, and Southern Europe, where the vast majority are Catholics or Orthodox believers (Bullivant 2018). Like Eastern Europe, Western Europe also had its exceptions in countries such as Portugal and Spain, where Catholicism was closely associated with authoritarian governments until the mid-1970s.

Patterns of religiosity are different in Western, Northern, Southern, Central and Eastern Europe (Voas and Debler 2011, 55–56). An interesting country in Europe is Slovenia, which lies on the border between East and West, and between the North and South of Europe. One can surmise that historical conditions and cultural influences have affected the country's community from all possible directions. So what is the religiosity of the country's youth? The answer to this question can be found in a report of the results of representative broadcasts conducted on behalf of the Slovenian government in 2020:

> "Catholicism has been losing favor among young Slovenes at least since the beginning of the 21st century. In a broader perspective, this means that religion is losing its potential to be a source of youth identity – the share of those who do not identify with any religion has increased from 24% in 2010 to 40% in 2020. Secularization trends are also present with regards to church visitation. Since 2013, we have been witnessing a significant increase (from 30% to 43%) in the share of those who never go to church. We should note, however, that the falling trend of those who regularly visit church every week has, at the same time, reversed, so that the level in 2020 was the same as in 2000. This means that we are witnessing a mild polarizing trend among young people as regards religion." (Deželan and Lavrič 2021, 69–70)

Pereira Coutinho and Wilkins-Laflamme note that the results of previous studies of the religiosity of young people from Catholic countries in Europe are vague, depending on the research methodology used, especially the different parameters of religiosity used, as well as the omission of some countries from individual studies. However, despite some discrepancies in the data and the extent of secularization in different countries, the first set of findings shows that the replacement of the youngest cohort of the populations studied is taking place in both Western and Eastern Europe, even if it started at different levels due to different socio-political contexts (Pereira Coutinho and Wilkins-Laflamme 2023, 326). Secularization, individualization and privatization are currently common processes in all regions of Europe.

Despite some differences and exceptions, research in recent years has confirmed the following theses: a) young people in Europe are less religious than older people; b) young people are becoming less religious as they age (341).

Directional proposals for the renewal of youth ministry in the insightful critical analysis of the process of secularisation, Janez Vodičar cites the achievements of Talal Asad, who, using the genealogical method, has been trying for many years to show the genesis of secularism and confronts what is "secular" not only with religion itself, but also with tradition. Asad, who has experienced Christian, Muslim and Hindu influences since childhood, revives the discussion of secularisation, confronting his philosophical views with the theses of sociologists of religion from the West, especially J. Casanova. It is impossible to recall this discussion here, even in the greatest summary, but I want to quote the thought of Vodičar, who rightly criticizes the preconceived notion in Europe that "modern pluralistic society is the pinnacle of civilization" and that "secularism should be defended in every respect, without even knowing what it actually means" (Vodičar 2020, 254). I completely share this view. However, if the Catholic Church in Europe wants to preserve its vitality, it is not enough to criticise and oppose the dominant cultural trends in European societies. The Church must prioritise pastoral ministry among young people with a clear missionary, evangelistic and catechumenal orientation. Christian formation can involve even very small groups of young people, but it should be deep and strong enough to give young Europeans the knowledge and courage to bear witness to Christ among their peers. An ambitious youth ministry program requires, first of all, the expansion of the subject of this ministry to include well-prepared young lay animators (Polak 2018), as well as the use of new electronic technologies in church communication and the modern language used by most of today's youth.

4. Reviving of (Pre)-Evangelisation

For a pastoral theologian, the situation of the progressive erosion of religiosity among the youth of Europe raises the question, what should be done in pastoral care to halt and preferably reverse this cultural trend, which is clearly unfavourable

for the Church? One possible direction of pastoral activity is to revive pre-evangelisation activities. This involves various ventures organised in the pre-fields of religious faith, mainly cultural events. Pope Paul VI pointed out that pre-evangelisation can be served by an infinite number of means, especially "open preaching, as well as art, scientific research, philosophical inquiry, the correct awakening of the feelings and longings of the human spirit" (Paul VI 1975, 51).

According to Pope Benedict XVI, three avenues are fundamental in the search for God by non-believers in Him: the world, man and the witness of the lives of believers (Benedict XVI 2012, 39–41).

Naturally, pre-evangelisation should be regarded as a preliminary stage in the process that ultimately leads to evangelisation, i.e. the proclamation of the salvific kerygma, which is Jesus Christ and His Gospel. At the same time, it is worth noting that the beginnings of pre-evangelisation are often very far from the final goal of evangelisation. This can be compared to an expedition to the highest mountain peaks in the world. The lengthy preparation of such a large expedition has little to do with the joy, happiness and sense of fulfilment experienced only when the goal of the expedition is achieved. Such preparations sometimes take years, are multifaceted in nature, place high demands on the candidates, and usually only a few of them reach the summit. No one draws the conclusion from the above reasoning that, since things are like this, it is not worth the arduous effort of preparing an expedition. The same is true of pre- pre-evangelisation. Even if only a small portion of the people covered by it reach the knowledge of the truth of the faith and accept Christ as their Lord and Saviour, it is worth undertaking (Przygoda 2019a, 49–50).

The youngest generation of Europeans is heavily influenced by the consumerist and hedonistic culture of utilitarianism. Practical materialism, individualism, subjectivism and sometimes narcissism are the characteristics of this generation, which has no desire to ask great questions about the meaning and purpose of life and no strength to take up the struggle for great ideas, including the development of personal faith. Young people who still attend religious lessons at school are not attracted by the desire to learn about metaphysical reality, but rather by the pleasant and friendly atmosphere in the lessons (Szymczak and Adamczyk 2022, 97). Today, there are many old and new ways of communicating faith, but at the core of undertaking the task of transmitting faith to others is the personal experience of God, which is born in prayer and nourished by adoration of God. Only a person transformed by Christ and filled with his Spirit can then become His witness and thus a transmitter of faith to others (Przygoda 2019a, 61–62).

Opportunities for both pre-evangelisation and evangelisation of youth in many European countries are provided by religious lessons retained in public and private schools. In Poland, religious lessons were restored to schools after the communist era in 1990. From the beginning, this fact engendered much controversy and was the subject of many debates and public discussions, which are also being revived today, especially in the context of election campaigns. The majority of the

public, parents and children accepted religious instruction in school. For many Poles with differing views, it was important to guarantee the non- compulsory nature of religious instruction at school, which, by the way, was enshrined in the law from the beginning. Unfortunately, recently in Poland there has been a tendency mainly among secondary school students, especially those living in the largest cities, to abandon school religious education, with the result that the Catholic Church in Poland is slowly losing this important tool for religious influence on young people (Mąkosa, Zając, and Zakrzewski 2022).

Religious teachers cannot overlook their students' approach to faith, but it must be incorporated into a new strategy of action. Claims that the grading system or some pressure from external factors can change something in the views of young people must be rejected. A religion lesson should never become similar to a physics or history lesson, but this should be seen not as a failure, but as an opportunity. As Janusz Mariński (2020, 42) notes:

> "Religious instruction at school is for some students /.../ the only clear form of contact with the Church, and for catechists an opportunity to conduct pre-evangelization. Even if religious education at school has become a social fact, it remains an open question about the effectiveness of its impact on the religious consciousness of children and adolescents."

The opportunity for the future shape of religion lessons – especially in high school – is its existential and dialogical character. The inductive method should be used, and the truths of faith should be presented inclusively. Since adolescents want to talk about the problems they experience, the starting point of each lesson unit should be a conversation about their experiences, from which only the religious theme should be derived, and solutions to the problems suggested by the Christian faith should be consistently given. The overemphasis on the intellectual dimension of religion lessons leads to the transformation of these units into lessons in religiology, and these, unfortunately, are unlikely to contribute to the growth of young people's faith attitudes. It is far more important for the Church to have a formative impact on students. Religion teachers need to liberate themselves from the dream of influencing crowds and focus more on a personal relationship with individual students. Let them be convinced that if they can save and strengthen the faith of one student, they can potentially also save the faith of his future spouse, then his children and maybe even his grandchildren. Religion in school, with the weakening condition of the family, makes great sense and is worth fighting for in any country, in any social, political or cultural setting.

5. Active Participation in Building the Community of the Church

Building the community of the Church is accomplished through participation in religious practices, which are derived from an attitude of faith. It is difficult to expect

a person who does not believe in God to participate in some forms of worship, although it sometimes happens, which can be explained by the fact that people do not always act in a logical and consistent manner. The level of participation in religious practices among young people in Europe varies. 70% of Czech young adults and about 60% of Spanish, Dutch, British and Belgian young adults never attend religious services. Only 2% of young Catholics in Belgium, 3% in Hungary and Austria, 5% in Lithuania and 6% in Germany say they attend weekly Mass. This contrasts sharply with their peers in Poland (47%), Portugal (27%), the Czech Republic (24%) and Ireland (24%). Weekly Mass attendance is 7% among the French and 17% among British young Catholics. In addition, 80% of Czech young adults and about 70% of Swedes, Danes, Estonians, Dutch, French and Norwegians "never" pray (Bullivant 2018, 7).

In the community of the Church, there are various attempts to revive religious practices, but pastors do not always take into account the fact that these practices are a consequence of a developed attitude of faith. Thus, any endeavour to get young people to engage in religious practices must go hand in hand with revitalising their faith. However, it is conceivable that due to extreme religious experience during religious practices, faith can also be awakened from dormancy. This sometimes happens during services combined with intercessory prayer for healing, during pilgrimages to holy places, or during the extreme Stations of the Cross (a practice known in Poland that involves walking from 15 to even more than 40 kilometres in silence at night). Nevertheless, more important seems to be the persistent presentation of the proposition of faith in the direct contact of the pastor, religion teacher, parent, peer, friend, as well as the presence of this proposition in the virtual world, where modern youth spend a lot of time.

An attitude of faith is born primarily from hearing the word of God (Rom 10:17). However, preaching the Gospel in a secular environment places specific demands on the preacher. On the one hand, the essence of the Gospel remains unchanged, as it is still the good news communicated to people by God. Therefore, when preaching the word of God, one should always keep in mind the unchanged Gospel and the current life of the Church and theology, which is an adequate interpretation of the revealed word of God. On the other hand, however, the preacher should listen to people, understand their problems and try to answer people's questions and desires. According Leszek Szewczyk (2021, 730–731):

> "Preaching the word of God to secularized people should begin with arousing a longing for God. /…/ The homiletic literature points to five expectations of the modern listener of the word of God: rescue, especially in difficult life situations; opening to the future, that is, helping to see the way of life and indicating possible steps; critical time signal, ability to recognize the signs of the times; explanation of the situation in which the man found himself based on the biblical message; solidarity, that is, the accompaniment and compassion of a person and a Christian who does not have simple answers ready, but is aware of complex life situations."

Young people's expectations of the preacher are definitely higher than those of older people who are stable in their attitude of faith. Young people have much perturbation with themselves, in their relationships with parents, friends, colleagues, and in their relationship or lack of relationship with God. That's why in sermons they expect answers to many questions they sometimes can't even articulate. The preacher should empathise with the problems of young people, answer their most fundamental questions and desires, and lead young listeners to a personal encounter with Jesus Christ. Today, there is no place in preaching for authoritarianism and clericalism, but the preaching of the word of God, especially among the young, is about enriching each other in mutual dialogue (Vodičar 2024, 25).

The relationship of young people to the Church is mainly based on traditions passed down from their parents and family of origin. Consequently, it is often not a bond of a personal nature, resulting in strong religious convictions and commitment to its life. However, many young people are not indifferent to the proposals made by the Church, but expect from it, above all, some form of experience of God (*sacrum*) and an experience of community.

Young people report the need for priests to be more accessible than at present, to be ready to meet them and offer them time, to create external conditions for meeting and dialogue (Szymczak and Adamczyk 2022, 69). The Catholic Church, other churches and religious denominations in Europe in contemporary society must recognise that they no longer have the exclusive right to shape human behaviour to remain in competition with other institutions.

A legitimate question is: what can be changed in the Church community to make its offer interesting to young people? As Mariański (2012, 99) notes, a new style of life and pastoral ministry is needed, "not a style of disapproval and threat, but one full of merciful concern for the formation of consciences and the transformation of a faith 'inherited' and out of habit, into a faith that is a personal choice, convinced and confirmed by the witness of life". The Catholic Church is obliged to accompany people on the path of their salvation in every environment and at every stage of their journey. This is especially important with regard to young people, in order to first find them and establish some form of communication, then to rebuild the trust in the institution of the Catholic Church that has recently been damaged by cases of sexual abuse of minors by clergy. Only then can an attempt be made to enter into a dialogue with the young, in which there will be room for a conversation about a meaningful life, about happy fulfilment in love, which is possible, among other things, in a well-ordered marriage and family life. However, such a modus of life requires the adoption and observance of moral principles also in the field of human sexuality. This is not an easy task, but it is probably still achievable. The Catholic Church has its stable moral principles that make high demands on people in the field of sexuality, but in the pastoral care of young people, it is not enough to communicate these principles; it is necessary to show paths for their implementation that guarantee lasting satisfaction and not just a temporary feeling of happiness.

In terms of youth evangelisation, an important issue is building positive attitudes toward the Church. To build lasting attitudes, expressed in action, both conviction and experience, derived from experience, are necessary. To build positive attitudes toward the Church, it is therefore necessary to personally experience it as a true community. This should be accompanied by various emotional-spiritual states such as a sense of happiness, contentment, joy, elation. However, what is at stake here is such an experience, which is not just a mere experience, but also a decision of the will, a holistic, complex, deeply existential act of the person, giving a specific, fundamental direction to human life (Słotwińska 2004, 223–224). Of course, the open question is how to realistically achieve this. It seems that it is necessary to let young people act in the first place. They are the ones who have the ideas: sometimes they organise an evening of prayer vigil (evening of praise) and invite their peers to the event, sometimes an evangelistic concert in the city's parks and other times an evangelistic meeting in a large sports hall combined with joint singing and testimonies of good Christian life presented by young people's idols. To put it in Pope Francis' favourite figurative language, "it takes two to dance," but this time "the one who has to invite the bishop, pastor, religion teacher to dance" is the young person – not the other way around.

6. Fostering Social Activity through Participation in the Church's Apostolate

An old Indian proverb states: "As long as children are young, give them roots; but if they become older, give them wings." (Halczuk 2017, 71) "Wings", according to the cited wisdom, mean opportunities for action–development through meaningful activity, especially social activity. The experience of the two decades of the 21st century indicates that young people are particularly open to involvement in various forms of volunteerism. Volunteering is based on universally accepted humanistic values, so it is ecumenical and universal in religious terms. The Catholic Church organises and patronises groups of volunteers, since the idea of volunteering is consistent with its communal and missionary nature. Since its inception, the Church has not only undertaken various charitable activities but also organised its own groups of active social activists. Nowadays, the activity of Christian volunteers, combined with the approval of the Church, takes on the characteristics of the apostolate (Przygoda 2012, 78–98). Volunteerism is one of the forms of social apostolate of the laity, which in essence consists in the conformity of life to the faith, in the honest performance of domestic, social and professional duties, through which other people are drawn to love the truth and the good, and ultimately to Christ and the Church. The social nature of man and the Christian vocation to holiness require apostolic involvement in various areas of social life.

A great value of volunteering is that it provides young people with an opportunity for personal development, strengthening self-reliance and creativity, completing interesting apprenticeships and gaining experience, so often desired by

employers. Young volunteers learn responsibility for themselves and for others, gain self-confidence and decisiveness in action, learn to become active citizens and work for the common good. In addition, they help cultivate sensitivity to values such as brotherhood and selfless assistance to people in distress. In this perspective, volunteering can be seen as a continuation of lifelong education for young people, which should result, among other things, in a better position in the labour market (Przygoda 2019b, 91–110). In addition, volunteering is an important instrument for preparing young people for a life of Christian marriage and family, which requires pro-social attitudes and sacrificial love (2023). Therefore, all forms of social involvement, charitable and cultural endeavours, should be encouraged in youth ministry, as they can provide an opportunity to experience the blessing of good deeds toward neighbours. And from doing good to one's neighbour, the road to a good God is sometimes quite short.

7. Adopt Forms of Communication that Resonate with Today's Youth

Communication problems are manifesting into key issues in the Church's evangelisation activities, since most of Europe's youth today are placed on the fringes of the Church community. And this means that without adequate pastoral assistance in the near future, they may find themselves completely outside this community. It is reassuring to adults who have influence over today's adolescents that, when asked about their expectations of communication, they yearn for good relationships with their parents and peers. Here, there is an opportunity for formative influence on adolescents by their parents, which calls for greater pastoral care of the domestic church. Parents need to be given the tools for effective religious formation of their children, which in turn requires the development of multiple forms of family ministry in dioceses, deaneries and parishes (Goleń 2017, 189–199).

The second way to effectively communicate with youth requires creating peer environments for the development of living faith (Fiałkowski 2018, 235–258). In small religious groups, young people can find what they expect from the world and the Church. It is in such environments that they can affirm their self-reliance, demonstrate their creativity, adopt axiological systems from below (not imposed on them from the outside, which they resent in their sense of freedom), use their entrepreneurial spirit, arrange the world in their own way, unlike the world of their parents, etc. Of course, for this endeavour to bear good fruit from the point of view of the Church's salvific purpose, these environments must be saturated with well-prepared animators. We have certain experiences in Poland that need to be revived, purified, as well as developed and promoted in other European countries. I have in mind the systems of Christian formation proposed by the Light-Life Movement, the Catholic Youth Association, the Schools of the New Evangelisation, as well as the "Youth on the Threshold" formation program already being implemented in 12 dioceses in Poland.

Such forms of communication between pastors and catechists and young people as amateur theatre groups, pilgrimages and integration camps, sports and recreational events, should be encouraged. It is important that, on the occasion of such seemingly distant events from the life of the Church, opportunities should be given for direct contacts, one-on-one conversations, and discussions with peers, which can, over time, open a young person to metaphysical questions and, consequently, to seek answers to them in the sources of the Christian faith. In pastoral work with young people, it is necessary to allow them to personally create their own path in life, to take advantage of the desire for competition, entrepreneurial spirit and ingenuity that is natural for this period of personal development. Young people have a natural need to show that they can arrange the world better than their parents' generation.

8. Conclusion

In conclusion, it should be noted that the contemporary form of secularisation has a significant impact on the Christian faith of young people in Europe. The positive elements of the secularisation process should be recognised, especially the recognition and liberation from the evil of religious fanaticism or fundamentalism. The cultural revolution we are facing in the first decades of the 21st century is leading many young people to axiological emptiness, loneliness, depression, anxiety, despair, and sometimes even to suicidal ideation and attempts. This generation does not have to be a generation lost to God. It seems that Generation Z is already slowly feeling a hunger for God and will soon begin to open more widely to His proposals. However, it is necessary to 'open the eyes' of this generation to the world of imperishable values, which also give a deeper meaning to worldly life. This is the pressing task of Christian parents, educators, teachers, catechists, parish pastors, but also of young evangelizers, who can ignite faith in the hearts of their peers with greater conviction and credibility. For young people who were not fortunate enough to be born into families that practice faith in God, the chance to find Him is in religious associations, where one can experience a living relationship with divine persons and with each other.

An important impetus to intensify the concern for the faith of young people was given to the community of the Catholic Church by the 2018 Synod of Bishops, as reflected in Pope Francis' apostolic exhortation "Christus vivit." In his message to young people, the Pope keeps returning to the question: how to revitalise the Christian life of young people, which is closely related to reviving the evangelising zeal of all members of the Church community. In Pope Francis' view, a great opportunity to attract young people to Christ and the Church is their social commitment, which was still high in light of data gathered from around the world before the Synod of Bishops. We know that the period of the COVID-19 pandemic somewhat disrupted this social enthusiasm of the youth. However, the situation is now slowly returning to normal. Young people are again eagerly embracing the social

ventures offered to them by non-governmental organizations (NGOs). This is a "kairos" and an opportunity that the Church must not miss. According to Pope Francis, "social engagement and direct contact with the poor remain a fundamental opportunity to discover or deepen one's faith and discern one's vocation" (Francis 2019, 170).

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Thematic Charting of Military Chaplaincy Scholarship (2014–2024): A Scopus and Web of Science Scoping Review

Tematsko kartiranje znanstvene in strokovne literature o vojaški duhovščini (2014–2024): sistematični pregled podatkovnih baz Scopus in Web of Science

Abstract: This scoping review maps peer-reviewed scholarship on military chaplaincy (2014–2024) indexed in Scopus and Web of Science. We asked how chaplains' roles, delivery models, collaborations, and methodological approaches relate to moral injury, suicide care, religious and ethnic plurality, and readiness. Searches (14 March 2025) yielded 217 records and after analysis 58 met our criteria analysis. We classified studies as outcomes (n=3), implementation/provider-facing (n=37), and conceptual/historical/policy/evidence syntheses (n=18). The literature depicts a maturing discipline, moving from traditional ad hoc pastoral responses towards structured, reproducible approaches. Military Chaplain collaboration with behavioural health and command is the most developed thematic area, supported by learning collaboratives and crisis protocols. Moral-injury interventions cluster into chaplain-only, co-facilitated, and protocolised narrative-ritual models, with promising but limited outcome signals. Evidence-informed practice is growing via screening, shared language, and brief interventions; comparative work highlights diverse measurement approaches, ethics, and governance across countries. Samples are heavily weighted toward Christian chaplains, male service members, and the U.S. VA/DoD contexts. Gaps include rigorous trials, non-U.S. and minority-faith contexts, mechanism testing, and economic evaluation.

Keywords: Military chaplaincy, Military chaplains, Moral injury, Suicide prevention, Integrated care, Spiritual readiness, Implementation science, Confidentiality, International comparison, Scoping review, Armed forces

Povzetek: Pričujoči shematični pregled mapira znanstveno in strokovno literaturo o vojaški duhovščini, indeksirano v podatkovnih bazah Scopus in Web of Science v obdobju 2014–2024. V prispevku odgovarjamo na vprašanje, kako so vloge vojaških kaplanov, modeli izvajanja, oblike sodelovanja in metodološki pri-

stopi povezani z moralno ranjenostjo, samomorilnostno oskrbo, verskim in etničnim pluralizmom ter stalno pripravljenostjo. Iskanje v bazah (14. marec 2025) je prineslo 217 zapisov, po presoji jih je našim merilom ustrezalo 58. Študije smo kategorizirali na troje vrst, in sicer: študije izidov (n = 3), izvedbene/na izvajalce usmerjene (n = 37) ter konceptualne/zgodovinske/politične/sintezne (n = 18). Raziskava je pokazala, da je sodelovanje vojaških kaplanov s psihološko službo in poveljstvom najbolj razvito področje, podpirajo pa ga mreža sodelujočih in krizni protokoli. Intervencije ob moralni ranjenosti se razvrščajo v tri tipe: intervencije, ki jih izvajajo kaplani, sovodene (kaplan in klinični strokovnjak) in protokolirani narativno-ritualni pristopi s sicer obetavnimi, a še omejenimi izidi. Dokazano podprta praksa se razvija prek preverjanj, skupnega jezika in kratkih intervencij; primerjalne študije poudarjajo raznolike merilne parametre, etične okvire in upravljanje po državah. V vzorcih so sicer izrazito zastopani krščanski duhovniki, moški pripadniki ter ameriški vojaški in veteranski konteksti. Vrzeli vključujejo pomanjkanje strožjega preskušanja učinkovitosti, raziskav zunaj ZDA in manjšinskih veroizpovedi, preizkušanja mehanizmov delovanja ter ekonomskega vrednotenja.

Ključne besede: vojaška duhovščina, vojaški kaplani, moralna rana, preprečevanje samomora, integrirana oskrba, duhovna pripravljenost, implementacijska znanost, zaupnost, mednarodna primerjava, sistematični pregled literature, oborožene sile

1. Introduction

Today, military chaplains are uniquely positioned at the intersection of embedded presence, ritual competence, ethics advising, community linkage, and, in many jurisdictions, privileged confidentiality (Primc 2025, 98; Kocjančič 2021a; Šimac 2020).[1] Their "ministry of presence" makes them accessible both in garrison and during deployment. Their remit includes facilitating religious support across faiths and for those of no faith, advising commanders on ethics and accommodation, and conducting rituals that help individuals and units process loss and restore belonging (Carey and Hodgson 2018; Boniface 2022; Koenig 2022). Importantly, chaplains are often perceived as low-stigma entry points for care and as early confidants for distress, frequently preceding contact with mental and/or behavioural health services (Ramchand et al. 2015a; Morgan et al. 2016). At the same time, contemporary military chaplaincy operates within religiously plural armed forces and diverse legal frameworks: mandates and confidentiality protections vary internationally, shaping what chaplains can do, document, and share (Rance and Snape 2021; Liuski and Ubani 2021; Kocjančič 2021b).

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Over the last decade, military chaplaincy practice has profoundly changed, moving from traditional, generally *ad hoc* pastoral responses towards structured, reproducible approaches for addressing complex challenges such as moral injury (MI)[2] and suicide risk (Ames et al. 2021; Carey et al. 2023; Drescher et al. 2018). This evolution is evidenced by the articulation of specialized, chaplain-led MI protocols that centre on narrative, forgiveness, repair, and ritual, such as the eight-stage Pastoral Narrative Disclosure (PND)[3], which integrates concepts of narrative, forgiveness, and ritual, and has been evaluated favourably by chaplains for use alongside other treatment regimens (Carey et al. 2023). Furthermore, chaplains are increasingly crucial partners in multidisciplinary care, engaging in initiatives like the Moral Injury Group (MIG)[4], often co-facilitated with clinicians, which incorporates communal healing ceremonies to address the isolation and despair associated with moral pain (Antal et al. 2022). To better coordinate these efforts, integration models involving defined referral pathways, co-located teams, and learning collaboratives have matured across military chaplaincy and behavioural health (BH) structures in the military and among veterans, aimed at reducing fragmentation and clarifying roles by building essential professional trust (Nieuwsma et al. 2014; Jones et al. 2022). Complementing these clinical and organizational advances, the profession is developing and adapting measurement approaches to workflow, including frameworks for Spiritual Fitness (SF)[5] (Gutierrez et al. 2021; Koenig 2022) and chaplain-usable screening tools like the Brief Interview Screen for Military Spiritual Distress (BISMiSD)[6] for use in spiritual assessments (SAs)[7] (Kopacz et al. 2022), facilitating early identification and interdisciplinary communication regarding MI. However, despite this rapid programmatic growth, the evidence base supporting these interventions remains limited, with only a small number of rigorous studies completed to date, highlighting the continuing need for comprehensive MI-specific outcome data (Jones et al. 2022).

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[2] Moral injury is a trauma-related state that arises when serious moral wrongs, through one's own actions or inactions, by witnessing them, or via betrayal by trusted authorities, collide with deeply held values, disrupting psychological, social, and spiritual well-being and sometimes physical health (Carey and Hodgson 2018; Carey et al. 2023).

[3] PND is a pastoral care, counselling, and guidance–based rehabilitation approach for Australian Defence Force chaplains (Navy, Army, and Air Force) that prioritizes moral injury (Carey et al. 2023).

[4] MIG (Moral Injury Group) is a chaplain- and psychologist-led group therapy protocol for veterans, run across twelve 90-minute sessions, that focuses on moral injury (not PTSD). It builds a safe communal language for morally injurious experiences, integrates moral/spiritual concepts, and culminates in a public Community Healing Ceremony to promote healing, moral engagement, and shared responsibility (Antal et al. 2022).

[5] Spiritual fitness is the capacity of an individual or a group of people to draw on one's beliefs, principles, and values to stay grounded and resilient under stress, hardship, or loss. It involves cultivating personal qualities, rooted in religious, philosophical, or humanistic values, that shape character, guide decisions, and sustain integrity (Gutierrez et al. 2021).

[6] The BISMiSD is a brief, interview-based spiritual assessment for chaplains that screens for moral injury in military contexts by eliciting experiences and rating four indicators (exposure, moral dilemma, trust difficulties, and disruption with ultimate values/Higher Power) on a 5-point scale to produce a 4–20 score indicating likelihood of clinically significant MI (Kopacz et al. 2022).

[7] A spiritual assessment is a routine, usually pencil-and-paper survey used by VA chaplains to document a patient's desire for spiritual care and gather planning-relevant information, with formats varying by chaplaincy department rather than being fully standardized across the VA (Kopacz et al. 2022).

Given the recent acceleration of structured interventions and collaborative models in military spiritual care, this review adopts a scoping approach to map the extent, range, and nature of peer-reviewed scholarship on military chaplaincy from 2014 onwards. Our aim is not to assess effectiveness but to describe what exists: the roles chaplains perform in relation to MI/suicide and unit readiness; how services are delivered (stand-alone, co-delivered, or embedded); how chaplains collaborate with behavioural health and command; what is being measured (and what is not); and which implementation facilitators and barriers recur across settings. We also consider international variation (mandates, Church–State arrangements, confidentiality, and non-coercion), workforce formation and well-being, and the use of rituals and ceremonies as community reintegration practices.

We position our scoping review against prior syntheses that established the baseline of the field. Liuski and Ubani (2020) offered a comprehensive multidisciplinary review of how military chaplaincy is portrayed in European journal articles (2000–2019) indexed in JSTOR and EBSCO. This review noted a lack of research on modern military chaplaincy in international literature, observing that most European scholarship in this period focused predominantly on historical perspectives, especially concerning times of war, thereby indicating a need for more contemporary engagement with the profession. Subsequent reviews further mapped the field, including the scoping review by Layson et al. (2022), which gathered evidence on chaplaincy utilisation from a wide range of disciplinary databases (ATLA, CINAHL, PsycINFO, PubMed, SOCindex, EBSCO, Google Scholar), and Jones et al. (2022), which scoped MI interventions across discipline in 11 databases. However, the landscape of military spiritual care continues to evolve rapidly. Crucially, all these foundational scoping studies pre-dated the full-scale Russian invasion of Ukraine (February 2022) and the subsequent period characterized by significant geopolitical conflict, particularly the renewal of the Middle Eastern crisis (2023–present) and humanitarian crises that followed, inflection points likely associated with changes in operational demands, policy attention, and publication volume (Ristevska 2024). By conducting systematic searches in Scopus and Web of Science (2014–2024) and applying explicit inclusion/exclusion criteria, we produced a focused, practice-oriented field-level map that identifies mature thematic areas and emergent lines of inquiry, intended to inform current practice, policy, and future research.

2. Method

2.1 Design and Protocol Language

We conducted a scoping review with the pragmatic aim of mapping the extent, range, and nature of recent peer-reviewed scholarship on military chaplaincy (2014–2024) using two reputable, curated citation indexes: Scopus and Web of Science Core Collection. Their complementary coverage helps mitigate disciplinary

blind spots: Scopus typically includes newer applied social-science and health-services research, whereas Web of Science emphasizes long-established journals in theology, religious history, ethics, and military studies. Building on prior reviews in this inherently interdisciplinary domain (spiritual care, mental health, sociology), we first assessed their search coverage. Layson et al. (2022) and Liuski and Ubani (2020) did not include Scopus or Web of Science, while Jones et al. (2022), although using both, focused on interventions for moral injury rather than producing a comprehensive bibliographic map of military chaplaincy. Because Scopus and Web of Science are widely recognized discovery infrastructures for bibliometrics and systematic reviews, owing to their breadth, stable metadata, and citation-tracking capabilities, we conducted systematic searches in both databases for 2014–2024, as the foundation for our field-level bibliographic map.

We followed Arksey and O'Malley's foundational framework for scoping studies: identifying the question, locating studies, selecting studies, charting the data, collating/summarizing results, and consultation (Arksey and O'Malley 2005). Reporting adheres to PRISMA-ScR (Tricco et al. 2018).

Because journals often do not deposit their metadata to the large abstracting services immediately, we closed the window on 31 December 2024 to reduce the risk that early-2025 articles would be unevenly indexed and thus distort retrieval.[8]

2.2 Research Question

Guided by the scoping purpose, our review was organized around the following primary research question: *What peer-reviewed scholarship published since 2014 describes the roles, practices, delivery models, and measurement approaches of military chaplaincy, including its interfaces with behavioural health and command, in ways that bear on moral injury, suicide care, pluralism, and readiness?*

To effectively structure the thematic area architecture, we set three additional supporting questions:

a) How are military chaplains' distinctive contributions (embedded presence; ritual/memorial work; ethical advising; confidentiality; community linkage) characterised across services and countries, and how do these functions intersect with low-stigma pathways into care?

b) What patterns of service delivery and collaboration are reported (chaplain-only, co-facilitated clinical–chaplain interventions, embedded/triadic models), and how have these matured over the last decade?

c) What methodological approaches and parameters are being targeted (e.g., spiritual fitness, help-seeking, MI screening, readiness-adjacent outcomes), with which instruments, and where are the principal evidence gaps?

2.3 Information Sources and Search Strings

[8] This boundary maximizes retrieval stability while acknowledging that early-2025 articles may not yet be fully indexed; we note this as a limitation.

We searched Scopus and Web of Science Core Collection on 14 March 2025. The Scopus search was conducted using the TITLE-ABS-KEY field, which targets terms in the article title, abstract, and author-supplied keywords. The search string was designed around distinct conceptual clusters. The foundational term was "*military chaplaincy*", encompassing the institutional role of religious personnel in armed forces. We began with the phrase "*military chaplain**" and expanded it to include commonly used variations such as "*armed forces chaplain**" and "*combat chaplain**" to ensure full coverage of terminological variation across national and disciplinary contexts. Recognizing that relevant literature may use broader or slightly different language, we included "*chaplain**" as a standalone term to capture articles that discuss chaplains in military contexts without explicitly using the term "military" in the title or abstract. Similarly, we added concepts such as "*pastoral care*", "*pastoral counseling*", "*spiritual care*", and "*spiritual support*" to reflect the diversity of expressions used to describe the chaplain's role in caregiving and counselling. To ensure relevance to military populations, we included contextual keywords such as "*soldier*", "*military*", "*armed forces*", and "*army*". We further added "*defense*", "*defence*" (to account for British spelling), "*service member*", and "*armed services*" – terms that appear in both U.S. and international military publications to describe personnel and organizations. Finally, to capture thematic diversity within chaplaincy literature, we incorporated keywords reflecting prevalent research themes: "*moral injury*", "*resilience*", "*confidentiality*", "*pluralism*", "*mental health*", "*ethical guidance*", "*spiritual fitness*", "*values*", and "*moral support*". These terms were chosen based on a preliminary scan of existing literature, prior reviews (e.g, Jones et al. 2022; Liuski and Ubani 2020; Layson et al., 2022) and known focal areas in military chaplaincy scholarship (e.g., mental health collaboration, interfaith ministry, and ethics).

We combined terms using the AND operator to require the intersection of chaplaincy, military context, and topic relevance. Within each concept group, synonymous or related terms were linked by OR to ensure inclusivity. The search was limited to the TITLE-ABS-KEY fields to retrieve studies where chaplaincy-related content is a central focus rather than incidental.

The search was limited to the years 2014 through 2024 (PUBYEAR > 2013 AND PUBYEAR < 2025) and filtered to peer-reviewed journal articles only, using LIMIT-TO(DOCTYPE, "ar") for document type and LIMIT-TO(SRCTYPE, "j") for source type.

This resulted in the following Scopus search string or query:

```
TITLE-ABS-KEY(
      ("military chaplain*" OR "chaplain*"
      OR "armed forces chaplain*" OR "combat chaplain*"
      OR "pastoral care" OR "pastoral counselling"
      OR "spiritual care" OR "spiritual support")
   AND
      ("soldier*" OR "military" OR "armed forces" OR "army"
      OR "defense" OR "defence" OR "service member*"
      OR "armed services")
   AND
     ("moral injury" OR "resilience" OR "confidentiality"
      OR "pluralism" OR "mental health" OR "ethical guidance"
      OR "spiritual fitness" OR "values" OR "moral support")
   )
AND PUBYEAR > 2013 AND PUBYEAR < 2025
AND LIMIT-TO(DOCTYPE, "ar")
AND LIMIT-TO(SRCTYPE, "j")
```

In the Web of Science Core Collection, we used the TS= field, which searches article titles, abstracts, author keywords, and the proprietary "Keywords Plus." Although functionally similar to Scopus's TITLE-ABS-KEY, the Web of Science TS= field employs a different indexing algorithm that may produce complementary results, especially in citation-rich fields such as theology, military ethics, and historical studies. To ensure consistency, we replicated the same keyword clusters and Boolean structure used in Scopus, applied equivalent filters for publication type and date range (from 1 January 2014 to 31 December 2024), and selected only records classified as journal articles (DT = Article). All editions of the Web of Science Core Collection were included to maximise coverage.

This resulted in the following Web of Science search string or query:

```
TS This = (
      ("military chaplain*" OR "chaplain*"
      OR "armed forces chaplain*" OR"combat chaplain*"
      OR "pastoral care" OR "pastoral counselling"
      OR "spiritual care" OR "spiritual support")
   AND
      ("soldier*" OR "military" OR "armed forces" OR "army"
      OR "defense" OR "defence" OR "service member*"
      OR "armed services")
   AND
      ("moral injury" OR "resilience" OR "confidentiality"
      OR "pluralism" OR "mental health" OR "ethical guidance"
      OR "spiritual fitness" OR "values" OR "moral support")
   )
AND DT=(Article)
```

The final Scopus pull returned 115 records, while the Web of Science search yielded 102. Records from both platforms were exported and prepared for deduplication prior to eligibility assessment.

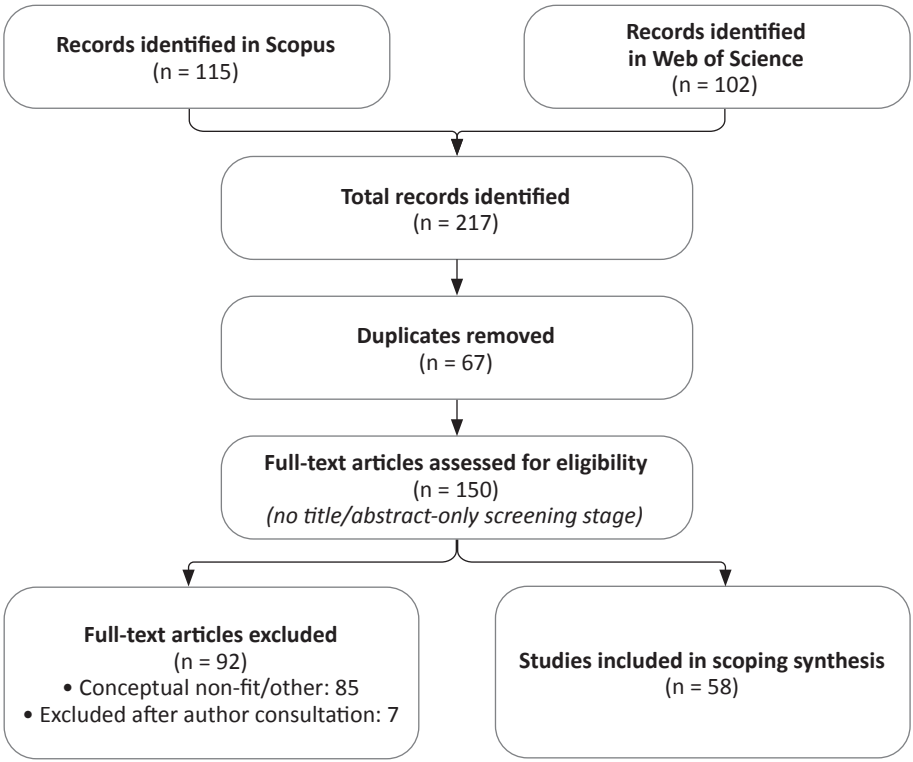

Figure 1: *PRISMA-ScR flow of information through the study selection process for military chaplaincy (2014–2024).*

2.3 Analysis Workflow and Eligibility Criteria

Database searches in Scopus (115) and Web of Science Core Collection (102) yielded 217 records. After exporting to CSV, we normalised titles (case and whitespace), deduplicated by exact title match (removing 67), and verified uniqueness within and across databases. The resulting 150 records proceeded to full-text relevance analysis.

We defined inclusion in precise terms: the article must place military chaplains or military chaplaincy at the centre of analysis–whether the focus was role, practice, utilization, training, ethics, collaboration, intervention delivery, or system integration–and the setting must involve the armed forces (active, reserve, or guard) and/or veteran health systems. We retained studies from veterans' systems where chaplains are embedded or central to care delivery.[9] Disagreements were resolved by consensus.

[9] When U.S. programs are cited, we name the U.S. Department of Veterans Affairs (VA) and Department of Defense (DoD) explicitly.

We manually reviewed the 150 curated full texts and excluded 85 for the reasons noted above (e.g. non-military chaplaincy; studies of religion or spirituality without chaplains as a substantive focus; civilian clergy; purely legal or conceptual pieces with only tangential reference to military chaplains). Following further consultation with Slovenian military historian Miha Šimac (subject-matter expert), we excluded 7 additional studies. This resulted in a deduplicated, transparently analysed corpus of 58 unique studies suitable for scoping synthesis.

2.4 Data Charting and Synthesis

We developed and piloted a structured charting template (Excel) on a heterogeneous subset of papers, then applied it to the full corpus, following scoping review standards for transparent, reproducible data capture prior to synthesis (Arksey and O'Malley 2005; Tricco et al. 2018). For each included article, we recorded bibliographic metadata, country and service context, branch or unit (if specified), and setting (garrison, deployed/operational, training, medical treatment facility, or mixed). We then extracted concept variables covering: (a) chaplains' role emphases (embedded presence, ritual/ceremony, ethical advising, community linkage, confidentiality/privilege); (b) collaboration patterns with behavioural/mental health professionals and command; and (c) service delivery configuration (chaplain-only, co-facilitated chaplain–clinician, integrated/team-based).

The authors independently charted and cross-checked entries for completeness. Disagreements were resolved through discussion. Consistent with Arksey and O'Malley's optional consultation stage, we also sought iterative feedback from subject-matter expert Miha Šimac on boundary cases and thematic area definitions.

To guide synthesis, each record was assigned a study type according to a simple hierarchy:

a) Outcomes: any participant outcomes attributable to chaplain-involved care, whether chaplain-only or co-led;
b) Implementation/provider-facing: empirical data without participant outcomes, e.g., roles, workflows, feasibility, acceptability, integration, training uptake, utilisation patterns, psychometric feasibility, quality-improvement/process evaluation;
c) Conceptual/historical/policy/evidence synthesis: non-empirical theory, history, policy analysis, or narrative reviews; single-case expositions without measured outcomes.

Each paper was assigned one primary thematic area (best thematic fit) and, where appropriate, up to two secondary thematic areas. The pre-specified thematic area architecture comprised six areas, which were later used to organise the Discussion:

a) The evolving role and identity of the modern military chaplain;
b) Chaplains as gateways to care (access, stigma, suicide prevention);
c) Collaboration with behavioural health professionals and command;

d) Chaplain-involved interventions for moral injury;

e) Assessment, Measurement Approaches, and Evidence-Informed Practices;

f) International, ethical, and governance dimensions.

Synthesis proceeded narratively through an iterative inductive–deductive process, moving between article-level charted variables and the six thematic areas. We first summarised studies by setting and delivery configuration, then consolidated patterns, consistencies, and gaps within the thematic area framework.

2.5 Limitations

Several choices inherent to scoping reviews (and a few peculiars to this topic) temper the inferences that can be drawn from our analysis. First, despite harmonized strings across Scopus and Web of Science, terminology in this domain is unusually variegated across languages, services, and eras; studies that foreground "religious support teams," "unit ministry teams," "spiritual readiness/fitness," "moral resilience," "soul care," "field priest/padre," "religion adviser," or tradition-specific titles (e.g., *aumônier*, *Feldgeistlicher*/*Feldprediger*, *fältpräst*) may not surface when "chaplain*" is absent from the title or abstract. Second, we delimited coverage to peer-reviewed journal articles and excluded books, book chapters, theses, reports, and other grey literature also indexed in these databases which biases the corpus toward disciplines and outlets that publish journal articles and away from historically oriented or policy venues. Third, although our search window extends through 2024, Scopus and Web of Science often index on with a delay; late-year issues and backfilled records can appear months later, and we therefore acknowledge a non-trivial risk. Finally, we retained veteran-system studies in which chaplains are embedded or central to care to capture system-level variation (mandate, confidentiality), but this choice may bias findings towards settings with established chaplain–clinical integration.

3. Results: Analysis of Study Type, Temporal Trends, and Thematic Distribution

Of the 58 studies that met the inclusion criteria (see the abridged master charting table in the Appendix), 3 were outcomes studies (Ames 2021; Cafferky, Norton, and Travis 2016; Cenkner et al. 2021), 37 were implementation or provider-facing, and 18 were conceptual, historical, policy, or evidence-synthesis papers.[10]

Across the 58-study corpus, publications rose sharply in 2020–2022 (10, 10, and 9 papers, respectively), then tapered in 2023–2024 (6 and 4) (see Table 1).

[10] For clarity, we include in the Appendix an abridged master charting table that summarizes variables across the six thematic areas for the full sample. Given the corpus size and scope, the complete, granular charting table is available from the authors upon request.

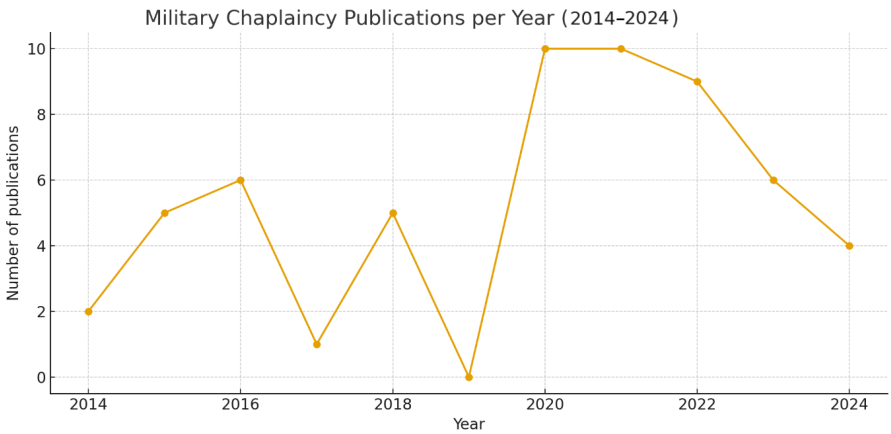

Chart 1: *Military Chaplaincy Publications per Year (2014–2024).*

Because the upswing begins before Russia's 2022 full-scale invasion of Ukraine, it likely reflects several converging drivers: COVID-era operational strain, the maturation of chaplain–behavioural-health collaboration around moral injury, and growing interest in "spiritual readiness." The post-2022 period did not reverse this trend; output remained high through 2022 and beyond, adding not only Jones et al.'s scoping review (2020) but also a wave of system-context analyses that focus on specific militaries and veteran forces: predominantly the U.S. (7 studies), as well as the Australian Defence Force and Australian veterans (Hodgson, Carey, and Koenig 2022; Carey et al. 2023; Layson, Carey, and Best 2023), France (Boniface 2022), the Slovenian Armed Forces (Muršič Klenar 2024), Sweden (Grimell 2024), South Korea (Feuer 2022; Lee 2022), the Netherlands (Schuhmann et al. 2023), and the Armed Forces of Ukraine (Makovskyi 2023; Sokolovskyi, Slyusar, and Hordiichuk 2024).

3.1 The Evolving Role and Identity of the Modern Military Chaplain

The reviewed literature presents military chaplaincy as a profession positioned at the intersection of pastoral care, institutional service, and public meaning-making. Foundational sociological studies describe chaplains as "doubly commissioned," accountable to both their faith communities and the military organisation, which creates productive, and at times acute, role tensions (Davie 2015). Contemporary theorists contend that many armed forces are experiencing processes of desecularisation, in which religious symbols, practices, and personnel re-enter organisational life in new forms. This reframes chaplaincy as part of broader institutional change rather than a static legacy function (Levy 2018). Conceptual analyses from Sweden further clarify how national contexts shape mandates: the Swedish model of "military soul care" positions chaplains as protectors of meaning, cohesion, and the will to defend, which contrasts with rights-based accommodation models in other Western forces (Grimell 2024).

Historical and policy perspectives highlight how public narratives and governance regimes contour shape practice. In pronouncedly secular France, centenary commemorations of First World War chaplains reveal how *laïcité* coexists with a symbolic public role for chaplaincy, even as direct religious authority is constrained (Boniface 2022). A South African World War I case study surfaces enduring role tensions between pastoral care and prophetic critique and even controversy over whether bearing arms is compatible with Holy Orders, foreshadowing later debates about complicity and resistance (Houston 2016). In Chile, debates about inclusive laicism and non-coercion surface highlight ethical risks in state-sponsored religion and the importance of safeguards for minority or non-religious personnel (Bellolio 2020). In the U.S. context, World War I chaplaincy also provided an early template for pluralistic practice: Protestant, Catholic, and Jewish chaplains frequently crossed confessional lines at bedsides and burials, operationalizing a "tri-faith" ideal (Mislin 2015). These cases underscore that chaplaincy identities are not monolithic; they are shaped by legal frameworks, civil-military relations, and national theologies of service.

Within units, embedded presence and trusted relationships remain defining features. Historical accounts of early Royal Air Force chaplaincy document the institutionalisation of an on-flightline, trusted-friend posture that continues to inform contemporary embedded ministry (Rance and Snape 2021). Recent qualitative work with chaplains describes the psychological costs of their role, including exposure to trauma and role strain, alongside sources of resilience such as collegial support and faith resources (Whitworth, O'Brien, and Stewart 2021). Practice-oriented essays suggest that ambiguity, when navigated reflexively, can serve as a pastoral resource, enabling chaplains to hold space for moral complexity in operational settings (Woodhouse 2021).

Finally, emerging readiness frameworks and ethical guidance indicate a shift towards evidence-informed, outcomes-focused identities. Proposals for "spiritual readiness" within total force models, and applied frameworks for operationalising spiritual fitness, invite collaboration across leadership, chaplaincy, and behavioural health, while raising important measurement questions (Koenig 2022; Gutierrez et al. 2021). At the same time, confidentiality and privileged communication remain central ethical pillars that enable chaplains to serve as low-stigma gateways to care and as moral advisors within command ecosystems (Prazak and Herbel 2020). Together, the conceptual and historical literature frames the modern military chaplain as an embedded practitioner who negotiates institutional and pastoral mandates to safeguard meaning, moral functioning, and access to care across plural contexts.

3.2 The Chaplain as a Gateway to Care: Access, Stigma, and Suicide Prevention

Across multiple samples, chaplains serve as a low-stigma, confidential entry point into the broader helping ecosystem. Post-deployment soldiers commonly report turning to chaplains and other non-provider sources when organisational barri-

ers or concerns about career impact make formal care less attractive (Kim et al. 2016). Large survey analyses show that those who seek chaplain care often face heavy stressor loads and mental health needs, underscoring chaplaincy's role as a front-door rather than a peripheral option (Morgan et al. 2016). Demand-side evidence further indicates that combat exposure increases utilisation of religious supports, including chaplain counselling, suggesting that operational stress elevates the salience of pastoral pathways to care (Cesur et al. 2020).

Within units, chaplains are often consulted first and then facilitate movement across the system. Studies of non-commissioned officers show that chaplains are a top referral choice for at-risk service members, with confidentiality cited as a key reason (Ramchand et al. 2015b). Help-avoidance syntheses recommend that chaplains leverage privileged communication, to normalise help-seeking, and enact structured handoffs to behavioural health when indicated (Prazak and Herbel 2020). At the population level, patterns from the DoD *Health Related Behaviours Survey* identify who is more likely to use chaplains and confirm that chaplain users commonly also engage other providers, positioning chaplains as both a gateway and a complement to clinical care (Kazman et al. 2020).

Qualitative research in deployed settings describes how chaplains' function within chaplain–behavioural health–command triads during acute suicide-related events, including advising leaders, managing boundaries around confidentiality, and coordinating postvention (Adler et al. 2018). Provider-facing surveys quantify the frequency with which chaplains encounter suicidality and simultaneously reveal gaps in preparedness that indicate a need for upskilling (Kopacz et al. 2016; Ramchand et al. 2015a). In response, programme evaluations show that targeted training in evidence-based practices can enhance chaplains' capability and collaborative confidence in suicide-relevant care (Wortmann et al. 2021). In high-stress communities of practice, such as special operations forces, chaplains' ongoing presence and relationship building underpin prevention and intervention, while communal rituals support postvention and unit healing (Lee-Tauler et al. 2024).

A consistent theme across utilisation and pathway studies is that confidentiality and embedded presence are primary facilitators of access. When perceived organisational barriers increase, reliance on chaplains and other non-providers also increases (Kim et al. 2016). Leadership preferences for referring to chaplains further institutionalise these pathways (Ramchand et al. 2015b). Implementation guidance highlights practical levers chaplains can use to reduce help avoidance, including clear explanations of privileged communication, stigma-reducing messaging, and coordinated warm handovers to behavioural health (Prazak and Herbel 2020). Complementary survey evidence suggests chaplains can also advance public health goals when equipped and authorised to do so, for example, through brief health behaviour interventions in routine encounters (Van Voorhees et al. 2014).

Population-level analyses identify demographic and experiential correlates of chaplain utilisation, including younger age, higher perceived stigma, and histories

of abuse, while also showing that most chaplain users are not isolated from the medical system (Kazman et al. 2020). Among active-duty soldiers, those who seek chaplain help exhibit higher rates of probable post-traumatic stress disorder (PTSD) and depression and are more likely to have experienced specific combat exposures, such as seeing dead bodies, which has implications for triage and risk assessment in pastoral contexts (Morgan et al. 2016).

In the field of access, stigma, and suicide prevention, the literature presents a coherent narrative. Chaplains are accessible and trusted, often serving as the first point of contact for individuals in distress, including those at risk of suicide, particularly when stigma or systemic barriers deter formal care (Kim et al. 2016; Ramchand et al. 2015b). They address significant clinical needs and frequently act as connectors to behavioural health services rather than as substitutes (Kazman et al. 2020; Morgan et al. 2016). Their effectiveness within the suicide care continuum relies on three key elements: a protected relational space grounded in confidentiality, structured collaboration with command and clinicians, and targeted training in evidence-based competencies (Adler et al. 2018; Prazak and Herbel 2020; Wortmann et al. 2021). Strengthening these pillars provides a practical roadmap for policy and programme design, with relevance for high-risk communities where an embedded pastoral presence serves as a crucial access lever (Lee-Tauler et al. 2024).

3.3 Chaplaincy Collaboration with Behavioural Health Professional and Command

Evidence across the Veteran and Defence systems shows that integration is not a single programme but a set of mutually reinforcing arrangements: co-location, shared protocols, and leadership endorsement. A large mixed-methods assessment identified familiarisation gaps and trust deficits between chaplains and clinicians, but also documented sites where team inclusion, routine case conferencing, and aligned referral pathways were already normal practice (Nieuwsma et al. 2014). Subsequent quality improvement work showed that structured collaboratives can shift everyday behaviours, with measurable gains in screening, referral clarity, and role understanding at participating facilities (Nieuwsma et al. 2017).

When chaplains are incorporated into broader health and public health initiatives, integration becomes routine rather than exceptional. National survey data on smoking cessation activities showed high chaplain willingness to perform brief interventions, illustrating how chaplaincy can serve as a “no wrong door” access point for health behaviour change within clinical pathways (Van Voorhees et al. 2014). Reviews mapping overlapping competencies recommend practical mechanisms to integrate workflows: warm handoffs in both directions, shared documentation conventions where appropriate, and deliberate cross-training to reduce misconceptions (Cooper et al. 2023).

During acute risk events, collaboration is operationalised through rapid coordination with commanders and clinicians. Qualitative analysis from deployed set-

tings details leader advisement, careful stewardship of privileged communication, and synchronised postvention activities following suicide-related incidents (Adler et al. 2018). Surveys of military chaplains and chaplain assistants highlight both the frequency of contact with suicidal individuals and uneven preparedness, reinforcing the need for agreed escalation thresholds and joint rehearsal of crisis protocols (Ramchand et al. 2015a; Kopacz et al. 2016).

Help-avoidance can be reduced when chaplains explicitly explain confidentiality, normalise help-seeking, and employ warm handoffs to behavioural health once risk or clinical need is established (Prazak and Herbel 2020). Preferences among non-commissioned officers to refer at-risk personnel to chaplains provide a leadership-level lever for standardising these pathways across units (Ramchand et al. 2015b). Ethical guidance for high-risk domestic scenarios, such as intimate partner violence, further specifies decision points for referral to statutory programmes while maintaining pastoral rapport and safety planning (Whiting et al. 2020).

Wortmann et al. (2020) found that training initiatives that equip chaplains with evidence-informed strategies strengthen joint working. Evaluation of the Mental Health Integration for Chaplain Services (MHICS)[11] training showed increased capability to use acceptance and commitment and problem-solving methods in pastoral encounters, along with reported gains in confidence when collaborating with clinicians (Wortmann et al. 2021). At the same time, provider well-being is an integration issue. Qualitative accounts of chaplain stressors and resilience recommend peer support, supervision, and institutional backing to sustain participation in multidisciplinary care (Whitworth et al. 2021).

In special operations communities and units, chaplain integration relies on persistent presence, insider networks, and autonomy-supportive interventions that interface smoothly with clinical and command elements. Communal rituals facilitate postvention at the team level (Lee-Tauler et al. 2024). Internationally, organisational models demonstrate similar logics. In Finland, chaplains serve as ethics trainers and lead psychosocial follow-ups after critical events within a doctrine that presumes close cooperation with other services (Liuski and Ubani 2021). In Ukraine, statutory role definitions assign chaplains responsibilities for psychoeducation, post-stress rehabilitation, and structured referral in partnership with psychologists, illustrating formalised collaboration during wartime (Makovskyi 2023). Conversely, Swedish accounts emphasise absolute confidentiality and the ministry of presence while advising command on ethics, which requires clear relational boundaries for credible cooperation with medical teams (Grimell 2020a; 2020b).

Successful integration appears to depend on clearly negotiated boundaries. The understudied area of cross-gender pastoral care presents distinctive safeguarding and referral considerations that must be aligned with clinical and command

[11] An intensive, specialty education in evidence-based psychosocial and collaborative approaches to mental health care (Wortmann et al. 2021).

policy to maintain trust for all parties (Roberts and Kovacich 2020). Provider-generated taxonomies of moral injury practice show where chaplains' narrative, cognitive, and ritual methods complement psychotherapy rather than compete with it, clarifying when co-treatment or sequential referral is preferable (Drescher et al. 2018).

Taken together, the literature presents integration as a design space with (at least) three actionable pillars. First, system scaffolding: leadership-backed collaboratives, consistent protocols, and participation in public-health workflows (Nieuwsma et al. 2014; 2017; Van Voorhees et al. 2014). Second, pathway choreography: use of confidentiality to lower thresholds for access, with scripted warm handoffs and joint crisis playbooks (Ramchand et al. 2015a; 2015b; Prazak and Herbel 2020; Adler et al. 2018). Third, workforce capability and sustainability: targeted cross-training, role clarity in sensitive cases, and supports that enable chaplains to collaborate effectively (Wortmann et al. 2021; Roberts and Kovacich 2020; Whitworth et al. 2021). Different theatres and national systems adapt these pillars to local mandates, but the core mechanisms remain consistent and are presumably replicable (Lee-Tauler et al. 2024; Liuski and Ubani 2021; Makovskyi 2023; Grimell 2020a; 2020b; Cooper et al. 2023; Drescher et al. 2018; Rance and Snape 2021).

3.4 Chaplain-Involved Interventions for Moral Injury

Emerging intervention models cluster into three typologies. First, chaplain-only protocols, such as the manualised Structured Chaplain Intervention, demonstrate feasibility and symptom change signals in case-level outcomes on the PCL-5[12] and the Moral Injury Symptoms Scale – Military Version (MISS-M)[13], while results from a larger comparative trial are pending (Ames et al., 2021). Second, co-led formats pair chaplains with clinicians: a 12-week Moral Injury Group reported pre-post improvements in depression and religious/spiritual struggles, as well as gains in psychological health, self-compassion, and post-traumatic growth. The companion practice paper details the public, ritualised Community Healing Ceremony as a core element (Cenkner et al., 2021; Antal et al., 2022). Third, structured chaplaincy protocols such as PND have been scaled at the provider level in the Australian Defence Force, showing strong acceptability and a clear multistage pathway from narrative disclosure to ritual and restoration, although participant outcomes have not yet been reported (Carey et al., 2023).

Across these models, core therapeutic ingredients recur guided narrative work, moral meaning-making, ritual, communal witnessing, and confidentiality-enabled trust. Provider surveys describe how chaplains already operationalise these elements in routine practice, while qualitative veteran accounts in Australia link cha-

[12] The PCL-5 is a 20-item self-rated scale that assesses symptoms across the four DSM-5 clusters: intrusions (Criterion B), avoidance of trauma reminders (Criterion C), negative alterations in cognitions and mood (NACM; Criterion D), and alterations in arousal and reactivity (Ames et al. 2021).

[13] The Moral Injury Symptom Scale – Military Version (MISS-M) specifically assesses MI symptoms (not events) and includes spiritual/religious indicators of MI (Ames et al. 2021).

plain roles to screening, counselling, and protocolised stages addressing betrayal and restoration (Drescher et al., 2018; Hodgson et al., 2021; Hodgson et al., 2022). Feasibility studies extend the toolkit by embedding moral injury screening into spiritual assessments and by piloting clinician–clergy collaborations supervised by a VA chaplain. These were judged as acceptable and set the stage for chaplain-delivered variants (Kopacz et al., 2022; Pyne et al., 2021). Complementing these pilots, a VA Dynamic Diffusion Network ("learning while doing") initiative distilled ten core components of co-facilitated chaplain–mental health MI groups. This implementation science lens clarifies how teams make MI care reproducible across sites and where chaplaincy distinctives sit within the shared model (Smigelsky et al. 2022).

Methodologically, the evidence base is promising but limited. Outcome studies are few, sample sizes are small, and most designs are uncontrolled, which restricts causal inference and dosage guidance. Nevertheless, convergence across typologies supports plausibility and informs training and implementation (Ames et al., 2021; Cenkner et al., 2021; Carey et al., 2023). Future priorities include head-to-head and comparative effectiveness trials, routine incorporation of MI-specific measures alongside readiness-adjacent outcomes, and attention to delivery contexts where chaplains serve as low-stigma gateways within integrated pathways (Cooper et al., 2023).

3.5 Tools of the Trade: Assessment, Measurement Approaches, and Evidence-Informed Practices

Across the corpus, chaplaincy is moving towards routine, evidence-informed practice that employs structured assessment and shared clinical language. Moral injury screening within chaplain encounters is feasible, demonstrates acceptable internal consistency, and aligns with convergent constructs when chaplains administer brief instruments, supporting workflow integration rather than parallel tracks (Kopacz et al. 2022). Existing chaplain-collected assessment data already inform risk triage, for example, mapping sources of guilt and their relationship to suicidal ideation in veterans who sought chaplaincy services (Kopacz et al. 2015). At the practice-architecture level, PND provides a staged, chaplain-led template aligned with the World Health Organization Spiritual Intervention Codings (WHO SPICs)[14], explicitly linking screening to narrative, ritual, and restoration; its feasibility and workforce uptake at a national scale were demonstrated in Australia (Carey and Hodgson 2018).

Capability building is the second pillar. A VA–DoD training programme in evidence-based practices, including Acceptance and Commitment Therapy (ACT)[15]

[14] The WHO-SPICs (World Health Organization Spiritual Intervention Codings) are the colloquial abbreviation for the five categories of "spiritual intervention" procedural codes that resulted from the revision of the WHO-ICD-10 "Pastoral Intervention Codings". These codings are employed by chaplains and other spiritual carers to formally notate the spiritual screening and treatment interventions they use to assist the health and well-being of their clients (Carey and Hodgson 2018).

[15] Acceptance and Commitment Therapy (ACT) is a transdiagnostic intervention proposed as a promising

and Problem-Solving Therapy (PST)[16], led to provider-level gains in confidence, skills, and collaboration relevant to suicide prevention and mental health support. This indicates that chaplains can learn and apply empirically supported techniques without losing pastoral distinctiveness (Wortmann et al. 2021). Quality improvement efforts at scale are also important. A national learning collaborative targeting chaplain–mental health integration reported measurable improvements in screening, referral workflows, and role clarity, which together create the infrastructure that enables assessment tools and brief interventions to be sustained in practice (Nieuwsma et al. 2017). The Bio-Psycho-Social-Spiritual (BPSS) model[17] advanced by Layson, Carey, and Best further situates evidence-informed chaplaincy as integrative, blending spiritual assessment/ritual with practical supports and coordinated referral, rather than as a parallel track to clinical care (2023).

Finally, several adjacent strands reinforce an evidence-informed approach. Public health-style initiatives demonstrate chaplains' readiness to contribute to standardised care processes such as the 5 A's (ask, advise, assess, assist, and arrange) for tobacco cessation, indicating the transferability of protocolised skills to other behaviour change targets (Van Voorhees et al. 2014). Provider surveys and qualitative syntheses show how chaplains already use therapeutic elements such as narrative work and ritual, providing targets for future mechanistic measurement and fidelity checks (Drescher et al. 2018). Observational outcomes research highlights plausible pathways through spirituality and resilience that can inform construct selection for chaplain-relevant metrics, while large surveys of help-seeking and utilisation identify populations where screening yield is likely to be highest and where collaborative handoffs should be prioritised (Cafferky et al. 2016; Kim et al. 2016; Kazman et al. 2020; Cooper et al. 2023). Together, these strands validate the core claim of a profession that is becoming more measurable, more comparable across settings, and better equipped to link pastoral distinctives with empirically grounded practices.

3.6 International, Ethical, and Governance Dimensions

A growing body of comparative research corrects a US-centric evidence base by revealing diverse mandates and delivery models. Qualitative and descriptive studies from Sweden illuminate a distinct "military soul care" paradigm grounded in confidentiality, ritual, and ethical advising within a national defence ethos (Grimell

approach for addressing moral injury (MI), aiming to foster psychological and behavioural flexibility by promoting acceptance of experiences and facilitating commitment to actions toward value-based behaviour, often utilizing mindfulness and values clarification (Jones et al. 2022).

[16] Problem-Solving Therapy (PST) is an evidence-based cognitive-behavioural treatment recommended for major depressive disorder that has been adapted into a brief, didactic group format (Problem-Solving Training) in the military to build real-life problem-solving skills for coping with stressful events and maintaining readiness (Wortmann et al. 2021).

[17] The Bio-Psycho-Social-Spiritual (BPSS) model further situates evidence-informed chaplaincy as integrative, advocating that chaplains blend spiritual assessment/ritual (e.g., through methods like Pastoral Narrative Disclosure, PND) with practical supports and coordinated referral to clinical care, thereby leveraging their role as a crucial resource rather than merely operating on a parallel track (Layson, Carey, and Best 2023).

2020a; Grimell 2020b; see also Grimell 2024). Australia provides a comprehensive case of national development and implementation of a chaplain-led moral injury framework, PND, with workforce training, uptake data, and veteran-facing implications (Carey et al. 2023; Hodgson et al. 2021; Hodgson et al. 2022; Carey and Hodgson 2018). The Netherlands offers process-focused accounts of how chaplains cultivate moral resilience and use ritual in care (Schuhmann et al. 2023), while Finland and Ukraine map contemporary organisational structures and practice roles, including psychosocial follow-up, ethical training functions, and chaplain–clinician collaboration in conflict settings (Liuski and Ubani 2021; Makovskyi 2023; Sokolovskyi, Slyusar, and Hordiichuk 2024). Additional perspectives from Slovenia and South Korea describe deployment prayer and ritual models, as well as religious-tradition-specific practice manuals that interface with humanitarian law (Muršič Klenar 2024; Lee 2022). Historical and policy analyses from secular and pluralistic states such as France and Chile raise governance and ethics questions related to non-coercion, equity, and Church–State boundaries, which are crucial for interpreting programme transferability and safeguarding inclusive care (Boniface 2022; Bellolio 2020; Levy 2018). Pastoral-theological work further casts chaplains as potential "organic intellectuals" who accompany veterans through trauma and mobilise counter-hegemonic solidarities, thus linking moral-injury care to civic ethics and public meaning rather than limiting it to intrapsychic repair (Morris 2020). Political-pastoral analyses extend these governance questions by interrogating how command–obedience dynamics and patriarchal structures can enlist care to problematic ends; they urge chaplains to sustain a prophetic stance that prioritises divine/ethical obligation over institutional pressures and situates some forms of moral injury within these structural conflicts (Tietje 2020). Korean Buddhist history cautions that state priorities can shape military chaplaincy ideology and practice, underscoring the need for explicit ethical guardrails when religious care is embedded in the military institution (Feuer 2022). Voices from minority faith perspectives further highlight the stakes of pluralism and institutional trust, especially where experiences of discrimination intersect with moral injury and access to care (Hosein 2018).

4. Discussion

The scoping review shows that scholarship on military chaplaincy is not evenly distributed across all identified areas of inquiry; instead, evidence indicates it is concentrated in several high-density clusters, while other areas are only beginning to emerge and some remain significantly under-researched.

4.1 Areas of High-Density Research

Three thematic areas stand out as the most researched and heavily populated within the last decade of scholarship: the integration of military chaplains with behavioural health professionals, their role in suicide prevention, and the development of interventions for moral injury.

Collaboration with behavioural health physicians and command is the most prominent and well-developed theme. Research in this area provides a rich, multi-level picture of integration efforts. At the system level, Nieuwsma et al. (2014) present a foundational mixed-methods assessment of collaboration across the American VA and DoD settings, identifying systemic barriers as well as areas of success. Related studies demonstrate military chaplaincy's integration into broader health initiatives, such as public health workflows like smoking cessation, indicating the feasibility of wider "no-wrong-door" pathways involving chaplains (Van Voorhees et al., 2014). At the implementation level, a national quality improvement learning collaborative evaluated by Nieuwsma et al. (2017) showed that structured initiatives can produce measurable gains in screening, referrals, and role clarity. At the practice level, Cooper et al. (2023) synthesise evidence to map the overlapping and complementary roles of chaplains and clinicians, advocating concrete collaborative pathways and warm handovers (Cooper et al., 2023; Nieuwsma et al., 2014). Qualitative work such as Adler et al. (2018) provides a detailed view of collaboration in practice, describing coordination dynamics among chaplains, behavioural health providers, and commanders during acute crises.

A second high-density area is suicide prevention, intervention, and postvention. The literature documents military chaplains' roles across the full continuum of suicide care. Large-scale surveys empirically establish chaplains and their religious support teams as key gatekeepers–often a preferred first point of contact for at-risk service members and a top referral choice for NCOs–frequently attributed to confidentiality protections (Ramchand et al. 2015b; Kim et al. 2016; Kazman et al. 2020; Adler et al. 2018; Lee-Tauler et al. 2024; Cesur et al. 2020). Studies have quantified how often chaplains engage with suicidality and identified corresponding training gaps, underscoring the need for targeted competency development (Kopacz et al. 2016; Ramchand et al. 2015a). In response, evaluations of chaplain training in evidence-based practices (e.g. ACT, PST) show gains in capability, confidence, and collaboration relevant to suicide care (Wortmann et al. 2021). Beyond prevention and intervention, qualitative accounts highlight chaplains' essential postvention roles–relational ministry and facilitation of communal grief rituals that contribute to unit healing and survivor care (Adler et al. 2018; Lee-Tauler et al. 2024; Liuski and Ubani 2021).

A critical mass of literature has now formed around intervention typologies for moral injury. Recognition of moral injury as a distinct form of suffering has driven significant innovation in chaplain-involved care. Research from this decade covers a range of intervention models: chaplain-only, manualised protocols such as the "Structured Chaplain Intervention", currently undergoing randomised clinical trial testing (Ames et al. 2021); co-led, interdisciplinary group models like the Moral Injury Group, with pilot outcomes (Cenkner et al. 2021) and operational specification (Antal et al. 2022); feasibility studies of protocols delivered by community clergy under VA-chaplain supervision (Pyne et al. 2021); and national framework implementation, with workforce training and adoption data from Australia's PND (Carey et al. 2023), with veteran-facing relevance and stage-spe-

cific chaplain actions further illustrated (Hodgson et al. 2021; 2022). Collectively, these studies demonstrate a sustained shift beyond conceptual discourse towards the development, testing, and implementation of specific, replicable, and spiritually integrated therapeutic approaches.

4.2 Emerging Research Fronts

Alongside well-established themes, two areas represent newer but rapidly developing fronts of inquiry: the development of validated assessment tools for military chaplaincy and the expansion of research into international and comparative models of spiritual care.

The field is moving beyond conceptual calls for measurement toward the empirical development and testing of tools tailored for the aforementioned chaplaincy practice. Feasibility studies within VA chaplaincy, for example, have examined the integration of moral injury screening directly into routine spiritual assessments, demonstrating both practical feasibility and preliminary psychometrics validity for chaplain-administered instruments (Kopacz et al. 2022). Related military chaplaincy assessment studies also show how routine data (e.g., guilt sources) can inform risk identification and care planning, further normalising evidence-based assessment within pastoral workflows (Kopacz et al. 2015).

Comparative international evidence broadens the perspective beyond the United States, demonstrating that military chaplaincy is not a single template but a family of context-shaped mandates. Taken together, the governance questions are not peripheral; they are central design constraints that determine whether confidentiality, presence, and ritual can be delivered as ethically legitimate public services within diverse armed forces worldwide. Moreover, comparative governance research urges systematic attention to chaplains and ritual at the unit level (cohesion, motivation) and to Church–State tensions at the institutional level (accommodation vs. establishment), reinforcing why transferability depends on legal–cultural fit (Hassner 2016).

4.3 Key Evidence Gaps and Future Research Priorities

To improve the field and equip policymakers with decision-grade evidence, several gaps require focused investment:

The corpus contains very few rigorous outcomes studies. Signals are promising in moral injury and resilience work, but most evidence is case-based, pilot, or implementation-focused rather than randomised or comparative effectiveness research (Ames 2021; Cenkner et al. 2021; Schuhmann et al. 2023). Previous evidence synthesis likewise concludes that chaplain-only models are under-tested and that outcome measurement often relies on proxies rather than head-to-head designs (Jones et al. 2022).

Beyond *does it work*, studies should identify *how* it works. Existing work points to plausible active ingredients, including guided narrative disclosure, communal ritual, relationship-based access, and structured collaboration, yet mechanisms

are rarely isolated or tested. Current sources describe candidate mechanisms and components that can be specified and mediated in trials: PND stages and military chaplain tasking, including restoration and ritual (Carey and Hodgson 2018; Carey et al. 2023; Hodgson et al. 2021; Hodgson et al. 2022), communal rituals within MI groups (Antal et al. 2022), chaplain presence and insider networks for suicide prevention (Adler et al. 2018; Lee-Tauler et al. 2024), and collaboration pathways with clinicians that may reduce stigma and improve referral capture (Cooper et al. 2023; Nieuwsma et al. 2014; Nieuwsma et al. 2017). Future studies should include theory-driven mediators and moderators, for example changes in moral meanings and ritual participation, alongside outcomes.

Samples and settings are heavily weighted toward Christian chaplains, male service members, and the American VA or DoD contexts. Important exceptions highlight why broader inclusion matters, including studies on Muslim service members and moral injury, Buddhist military chaplaincy guidance, Nordic and Australian models, and gendered care dynamics (Hosein 2018; Lee 2022; Feuer 2022; Grimell 2020a; Grimell 2020b; Liuski and Ubani 2021; Carey et al. 2023; Layson et al. 2023; Roberts and Kovacich 2020). Further research is needed to understand how military chaplaincy practice is adapted for, and experienced by, service members from different genders, faith traditions (including non-theists, humanists), service branches, and components (e.g., the Reserve), whose unique stressors and spiritual needs may not be captured by the current body of evidence.

Finally, to our awareness, none of the included studies evaluate the economic impact of military chaplaincy services. Although some work documents demand and utilization, these do not estimate costs or savings, nor effects on retention or readiness-linked productivity (Cesur et al. 2020; Van Voorhees et al. 2014). Future studies should incorporate health economic methods, such as cost–utility and budget impact analyses, and link chaplaincy inputs to downstream utilisation, readiness, and retention outcomes within integrated data systems.

5. Conclusion

The body of scholarship produced between 2014 and 2024, when considered as a whole, presents a compelling narrative of the professionalisation of military chaplaincy as an evidence-informed discipline. The emergence and development of specific research streams are not random but indicate a field in transition. Systematic evaluations of training programmes that equip chaplains with evidence-based clinical practices demonstrate a clear commitment to aligning spiritual care with established standards in behavioural health. The use of implementation science, including quality improvement collaboratives that enhance chaplain-clinician integration, reflects an awareness of the systems-level changes required to make care effective. The appearance of pilot trials, even if small and uncontrolled, demonstrates an ambition to subject chaplain-led interventions to the same standards of empirical validation expected of other health professions.

This scoping review documents the maturation of the discipline and highlights what is needed next. Our synthesis draws on literature indexed in Scopus and Web of Science, and thus reflects peer-reviewed journal outputs. We acknowledge that additional knowledge resides in other repositories and formats, including monographs, edited volumes, service reports, theses, program manuals, and grey literature, all of which warrant systematic mapping to complete the record. There is an increasing case for research literacy in military chaplaincy training, for chaplains who can participate in and lead studies, and for policy and funding that support chaplain-led research. On balance, recent conflicts appear to coincide with, but do not solely explain, the recent peak in scholarly output on military chaplains; they appear to sustain an already accelerating trajectory rather than initiate it. Taken together, the decade's scholarship depicts a field learning to account for its practices with clarity and rigour. The emerging narrative is one of steady consolidation toward an integrated model in which faith and evidence work in tandem to guide care.

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Appendix: Abridged Master Charting Table

Authors	Year	Country/System context	Study Type
Adler et al.	2018	U.S. Army	Implementation
Ames et al.	2021	U.S. Veterans	Outcomes
Antal et al.	2022	U.S. VA	Implementation
Bauer et al.	2023	U.S. Army (Medical Center)	Conceptual / Historical / Policy / Evidence Synthesis
Bellolio	2020	Chilean Armed Forces	Conceptual / Historical / Policy / Evidence Synthesis
Boniface	2022	France	Conceptual / Historical / Policy / Evidence Synthesis
Cafferky, Norton, and Travis	2016	U.S. Air Force	Outcomes
Carey and Hodgson	2018	Armed Forces/Veterans (General)	Conceptual / Historical / Policy / Evidence Synthesis
Carey et al.	2023	Australian Defence Force (ADF)	Implementation
Cenkner et al.	2021	U.S. VA	Outcomes
Cesur, Freidman, and Sabia	2020	U.S. Armed Forces	Implementation
Cooper et al.	2023	U.S. DoD	Implementation
Davie	2015	UK Armed Forces	Conceptual / Historical / Policy / Evidence Synthesis
Drescher et al.	2018	U.S. VA	Implementation
Feuer	2022	South Korean Military	Conceptual / Historical / Policy / Evidence Synthesis
Grimell	2020a	Swedish Armed Forces	Implementation
Grimell	2020b	Swedish Armed Forces	Implementation
Grimell	2024	Swedish Armed Forces	Conceptual / Historical / Policy / Evidence Synthesis
Gutierrez et al.	2021	U.S. DoD	Implementation
Hassner	2016	Primarily U.S.	Implementation
Hodgson, Carey, and Koenig	2021	Australian Veterans	Conceptual / Historical / Policy / Evidence Synthesis
Hodgson, Carey, and Koenig	2022	Australian Veterans	Implementation
Hosein	2018	U.S. Military	Conceptual / Historical / Policy / Evidence Synthesis
Houston	2016	South African Forces (WWI)	Conceptual / Historical / Policy / Evidence Synthesis
Jones et al.	2022	Military/Veterans (General)	Conceptual / Historical / Policy / Evidence Synthesis
Kazman et al.	2020	U.S. Military	Implementation
Kim et al.	2016	U.S. Army	Implementation
Koenig	2022	U.S. Military	Conceptual / Historical / Policy / Evidence Synthesis
Kopacz et al.	2022	U.S. VA	Implementation
Kopacz et al.	2015	U.S. VA	Implementation
Kopacz et al.	2016	U.S. VA/DoD	Implementation
Layson, Carey, and Best	2023	Australian Military (context)	Conceptual / Historical / Policy / Evidence Synthesis
Lee	2022	South Korean Military	Implementation
Lee-Tauler et al.	2024	U.S. Special Operations Forces (SOF)	Implementation
Levy	2018	U.S. & Israel	Conceptual / Historical / Policy / Evidence Synthesis
Liuski and Ubani	2021	Finnish Defence Forces	Implementation
Makovskyi	2023	Armed Forces of Ukraine (AFU)	Implementation

Authors	Year	Country/System context	Study Type
Mislin	2015	U.S. Military (WWI)	Conceptual / Historical / Policy / Evidence Synthesis
Morgan et al.	2016	U.S. Army	Implementation
Morris	2020	U.S. Veterans	Implementation
Muršič Klenar	2024	Slovenian Armed Forces	Implementation
Nieuwsma et al.	2014	U.S. VA/DoD	Implementation
Nieuwsma et al.	2017	U.S. VA/DoD	Implementation
Prazak and Herbel	2020	U.S. Military	Implementation
Pyne et al.	2021	U.S. VA	Implementation
Ramchand et al.	2015a	U.S. Army	Implementation
Ramchand et al.	2015b	U.S. Army & USMC	Implementation
Rance and Snape	2021	UK Royal Air Force (WWI)	Implementation
Roberts and Kovacich	2020	U.S. Army	Implementation
Schuhmann et al.	2023	Netherlands Armed Forces	Implementation
Smigelsky et al.	2022	U.S. VA	Conceptual / Historical / Policy / Evidence Synthesis
Sokolovskyi, Slyusar, and Hordiichuk	2024	Armed Forces of Ukraine (AFU)	Conceptual / Historical / Policy / Evidence Synthesis
Tietje	2020	U.S. Military	Conceptual / Historical / Policy / Evidence Synthesis
Van Voorhees et al.	2014	U.S. VA	Implementation
Whiting, Cardinet, and Merchant	2020	U.S. DoD	Implementation
Whitworth, O'Brien, and Stewart	2021	U.S. Military	Implementation
Woodhouse	2021	British Army	Implementation
Wortmann et al.	2021	U.S. VA/DoD	Implementation

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Miklós Tihanyi, Máté Sivadó, Marta Fekete and Márta Miklósi

A Narrative Analysis of the Relationships Between the Religious Perceptions of Serious Violent Offenders and Their Perception of Their Punishment

Narativna analiza odnosa med verskimi prepričanji izrazito nasilnih kaznjencev in njihovim dojemanjem kazni

Abstract: This study investigates the characteristics of religiosity among serious violent offenders who actively participate in religious activities in prison and the way that affects their perception of the crime and their sentence. In particular, we examine whether they are remorseful for their actions and desire forgiveness as a part of religious experience. sixteen prisoners in three penitentiaries who had committed serious violent crimes and actively participated in religious events, were interviewed. Analysis of the answers showed a positive correlation between a deep, substantive faith experience and acceptance of responsibility. Likewise, faith influences the development of regret for the crime. Those who admit their crime and repent it are motivated by a desire for forgiveness. The religiously sceptical prisoners admit to having committed the crime but do not show remorse. All this suggests that a deep, substantive experience of faith can have a positive impact on the achievement of punishment goals.

Keywords: experiencing religiosity; experiencing punishment; repentance; seriously violent offenders, religious education of prisoners

Povzetek: Študija proučuje značilnosti religioznosti med izrazito nasilnimi storilci kaznivih dejanj, ki aktivno sodelujejo v verskih dejavnostih v zaporu, in način, kako to vpliva na njihovo dojemanje kaznivega dejanja in kazni. Proučujemo zlasti, ali svoja dejanja obžalujejo in si želijo odpuščanja kot del verske izkušnje. Intervjuvali smo šestnajst zapornikov v treh zaporih, ki so storili izrazito nasilna kazniva dejanja, v zaporu pa aktivno sodelovali pri verskih dejavnostih. Analiza odgovorov je pokazala pozitivno korelacijo med globoko, vsebinsko versko izkušnjo in sprejemanjem odgovornosti. Podobno vera vpliva na razvoj obžalovanja za kaznivo dejanje. Tiste, ki svoje kaznivo dejanje priznavajo in obžaluje-

jo, motivira želja po odpuščanju. Versko skeptični zaporniki priznavajo, da kaznivo dejanje so storili, vendar ne kažejo obžalovanja. Vse to kaže, da lahko poglobljena, vsebinska verska izkušnja pozitivno vpliva na doseganje ciljev kaznovanja.

Ključne besede: izkušnja religioznosti, izkušnja kazni, kesanje, izrazito nasilni storilci kaznivih dejanj, versko izobraževanje zapornikov

1. Introduction

This study examines the possible effects of religious education among prisoners serving long prison terms for serious violent offenses. Two circumstances are of particular relevance to our topic. Firstly, they were imprisoned as people posing a high risk to society who have deliberately used serious violence against others. However, the long duration of their sentences reduces any hope that the prisoner will ever be released. All but one of the interviewees had been convicted of manslaughter. Several had received life or very long prison sentences. At the same time, all of them regularly and actively participate in various religious programs and events in prison, such as religious education. One aim of the study is to establish the relationship between the different ways in which they experience religiousness, and how they judge the sentence imposed on them. Regret cannot be identified through confession. Confession lacks moral content. There may be a purely rational decision behind a confession. The prosecutor may offer a more lenient plea for a confession.

By comparison, remorse expresses moral connection with the act. Repentance of the act is a moral rejection of it. More specifically, it means that the individual condemns the act they previously committed, which in turn implies that the perpetrator recognizes the difference between good and bad, desirable and despicable behavior. We examine which content or formal approach to religiosity connects to the development of repentance as a moral rejection of the crime committed. This moral approach will serve as the basis for further investigation of the conjunctions between religiosity and perceptions of the sentence received.

We conducted the research in Hungary, where the presence of Christian churches is significant, as indicated in the 2021 census data (Népszámlálás 2022). The Prison Chaplaincy Service, which provides religious practice in prisons, involves only the Catholic, Reformed, Evangelical, and Jewish churches (Wolters Kluwer 2017). Smaller Christian churches and various missionary organizations may also be involved in prisoners' religious education with the prison service's permission. Consequently, religion and religiousness in this study is conceptualized and discussed alongside its Christian interpretation, and aims to investigate how severely violent prisoners serving long-term sentences experience their religiosity when actively participating in religious education programs, and how this relates to their judgment of the sentence they are serving.

Two research questions have been formulated. RQ1: Does religiosity during punishment lead to repentance and a desire for forgiveness? RQ2: Does religion contribute to the recognition of a crime, acceptance of punishment received, and perception of its justness?

2. Theoretical Background

The theoretical framework of our work is provided by the Risk-Need-Responsivity model (RNR model) for the treatment of prisoners. More specifically, the relationship between this model and religious practice in prisons. Duwe and Johnson's (2023) study showed that religiosity was positively related to childhood trauma, prosocial identity, and perceived social support while relating negatively to criminal thinking and employment needs. The results also revealed that religiosity is associated with less imprisonment and lower risk of recidivism, but only for people with a positive self-identity (Duwe and Johnson 2023).

The study of the relationship between religiosity and crime stretches back barely four decades. In itself, the phenomenon of religion and religiosity is extremely complex. Likewise the relationship between religion and crime, as well as religion and prison reintegration. Some studies emphasize the connection between religion and behavior in prison, leading to various results, some indicating no correlation between religiosity and behavior in prison (Pass 1999; Clear and Sumter 2002), others showing a positive relationship (Kerley et al. 2011; O'Connor and Perreyclear 2002). Others researched the relationship between religious practices and relapse with widely varying results. Some have found no established relationship between participation in religious practices and recidivism (Burnside et al. 2001), while others found no significant correlation between religious practice and relapse despite positive experiences; at most, cautious optimism was expressed (LaVigne et al. 2007). Others have shown distinctly positive outcomes on recidivism (Young et al. 1995, Johnson and Schroeder 2014, Jang et al. 2021). Johnson demonstrated that it is the intensity of participation in religious occasions and not mere attendance that influences the likelihood of reoffending (Johnson 1997, Stansfield et al 2016, Jang and Johnson 2023) following an institutional order. In this research, we investigate the relationship between remorse for the act, acceptance of the verdict, and religiosity. Accordingly, we accept the religious interpretation framework of "repentance". While people are responsible for how they act in the world, they are not necessarily responsible for the cognitive, affective, and behavioral deficits that realistically limit their ability to achieve social goals (Ward and Salmon 2009). The positive effect of religiosity on various factors of mental well-being is widely discussed in the literature (Makridis et al. 2020). The authors of this study hypothesize that remorse is related to the sense of responsibility that the court judged to be lacking. Concurrently, it can influence cognitive and emotional abilities. Jang et al. (2018) used interviews to research the effects of religious education in prisons, concluding that repentance resulting from conversion

includes offenders coming to see how their failures are connected and attributable to their old self, that is, to their guilt (Jang et al. 2018). In this sense, conversion is interpreted as a significant turning point in the lives of prisoners, resulting in a change in the individual's identity (Clear et al. 2000) through which the "old self" and the "new self" face each other (James 2002). Repentance is one way this confrontation is expressed. We chose interviews as our research method because they allow us to grasp what it means in an individual's life and how the aforementioned turning point manifests itself.

Interpretation of the content of religiosity after conversion can show significant differences. There are various ways of interpreting and measuring what religion and being religious means to someone. Such is the methodology used by the European Values Study and the World Values Survey Study (Haerpfer et al. 2022). Here, the question arises as to whether it means merely following rites and norms or whether it gives meaning to life and death. Similarly, the question emerges of how exclusive prisoners view their religion to be. Another interpretation sees religion as a worldview providing a lens through which people understand the events of their existence. Meanwhile, religion is no longer a moral constraint, rather resting on individual free choice. This situation results in religious pluralism (Berger 1967; Scheitle and Finke 2009, Beyers 2021; Pollack and Rosta 2017).

Furthermore, this not only allows free choice but also its rejection (i.e., religiosity without commitment, in which the individual does not bind themself unconditionally to any denomination or even to any religion). The verbal expression of this is the statement "I believe in my own way," formulated by Miklós Tomka, Hungary's well-known sociologist of religion, in his measurement methods (Tomka 2010). We also have to consider the diminishing role of institutional forms in individual religiosity. The European population is characterized by a lack of church and religious individualization (Casanova 2009). Accordingly, there are countless possibilities for interpretation of what it means to be religious and also many layers, including transcendental faith, rite, traditions, values, and cultural characteristics (Norris and Inglehart 2004, Inglehart and Baker 2000). Some distinguish two main dimensions within religiosity: the vertical dimension, including beliefs focusing individual existence in the afterlife; and the horizontal dimension of this world, essentially related to social existence (Davidson 1972, Williamson and Aneeq 2019; Ellis et al. 2025; Krauss and Silver 2021). The latter includes the individual's social activity and social existence (Traunmüller 2011).

As narratives of religiosity, this study considers transcendent faith as the central element of the content of religiosity, traditions as religious forms, and the religious reframing of life events. We supplement these with the religious background of the family of origin and the offender's childhood religious education. Punishment is partly intended to provoke reflection on an act committed in the past, essentially as retribution. Another punishment goal tries to shape the future in a forward-looking way (i.e., tries to trigger effects to make the offender a valuable member of society). Such can be the strengthening of responsibility (Sifferd 2021). Alternatively, even deterrence can be understood as a future-pointing effect (Ellis

2003). Aside from retribution, all punishment goals punish perpetrators in order to protect society.

Part of our research examines whether offenders express repentance. The question is precisely whether they regret what they have done in such a way that repentance is expressed. Regret of an act comes in many forms. An offender may regret their act because the court punished them for it, or because the community has condemned them (Duff 2001), or because they feel the need to be accepted back into the community (Bennett 2008). From the perspective of our topic, it is whether they regret what they did because they have realized that the act was a sin, and see forgiveness and striving to forgive others as a suitable means of expressing that. Repentance may lead to an acceptance of punishment as just, thus the convict's view of the sentence they are serving is one subject of our research. The severity of the punishment and the sense of justice are connected in most cases (Jenness and Calavita 2018). This is particularly interesting in the case of those who are serving long or whole life sentences. Therefore, it is worth examining whether religion has a role in acceptance of punishment and its justness, or whether, more generally, characteristic self-justification techniques work (Adshead 2011).

In recent decades, the literature has mainly examined the role of religiosity in the evaluation of punishments for criminals (Grasmick and McGill 1994, Applegate et al. 2000, Unnever and Cullen 2006, Baker and Whitehead 2020). These results present how personal faith preferences affect judgment of the punishment of others. Compared to these, one of the main questions in our research concerns how an inmate who found or lives their religion in prison evaluates their punishment. Is there some religious attitude at work in judging their own punishment?

3. Method

We chose interviews as our research method since our primary goal in exploring the topic was not to extract numerical data but to get to know the opinions and attitudes of our interviewees. Gorard says of interviews that "stories stick more easily in the human mind, their illustrative character is unquestionable" (Gorard 2004, 7). The interview parts in the "Results" chapter serve to illustrate this. When we talk about the experience of faith and the manifestation of religiosity, we are more interested in these stories. The condition termed "triangulation" by Denzin (1970, 2018) serves to validate qualitative research. The interviews were semi-structured, and the set of questions was compiled so that, by analyzing the narratives, it would be possible to assess the religiosity of these long-term prisoners, the motivational background of the conversion, and the punishment imposed. When compiling the questions, we considered the dialogic nature of prison relationships (see e.g., Kreager and Krutschnitt 2018), so the inmate interview questions were prepared for this systemic approach. We present the main characteristics of the interviewees in Table 1.

code	sex (M/F)	age	place	date of interview
FT1	M	57	Szeged	14.02.2023
FT2	M	66	Szeged	14.02.2023
FT3	M	51	Szeged	14.02.2023
FT4	M	48	Szeged	14.02.2023
FT5	M	35	Szeged	14.02.2023
FT6	M	43	Szeged	14.02.2023
FT7	M	59	Szeged	14.02.2023
FT8	M	83	Sátoraljaújhely	24.11.2022
FT9	M	51	Sátoraljaújhely	24.11.2022
FT10	M	41	Sátoraljaújhely	24.11.2022
FT11	M	50	Sátoraljaújhely	24.11.2022
FT12	M	51	Sátoraljaújhely	24.11.2022
FT13	M	64	Tiszalök	10.01.2023
FT14	F	52	Tiszalök	10.01.2023
FT15	M	41	Tiszalök	10.01.2023
FT16	F	41	Tiszalök	10.01.2023

Table 1: *Descriptive table of the interviewees.*

The subjects are all serving sentences of more than fifteen years. They have all been in prison for over seven years. Both FT13 and FT16, who are about to be released, have spent more than twenty years in prison. All interviewees regularly participate in religious education and religious services. Regularity was an important aspect, and in order to ensure this, we also involved the prison chaplains in the selection of subjects. The interviews were recorded using a tape recorder and then typed accurately into a Word document. The prison staff did not influence the recording. The prison chaplains were not present during the interviews. The researcher recorded the interviews in rooms designated for religious services, except FT1 and FT6. Those two subjects represent a particularly high security risk, so we were able to record the interviews with them in a specially designed room. The time available for interviewing was not limited, and the sessions lasted 30–50 minutes per subject. The personal data of the subjects were only accessible to the researchers, who signed a confidentiality agreement. The researchers summarized the personal data in an encrypted Excel document. We coded the subjects in the same table, from FT1 to FT16. Only the codes are included in the typed interview texts and in further analyses.

In qualitative data analysis, conceptual units are the basis of analysis (Babbie 2001). We took the individual blocks of questions and topics as conceptual units during the analysis. These conceptual units were formed as follows:

a) Experience of religiosity, perception of religion
b) Assessment of the punishment, i.e., the justice of the sentence, whether there is any religious interpretation of the execution of the punishment, and whether there is remorse.

Coding and labeling were done manually, enabling a more in-depth analysis of the text, but which relies heavily on the researcher's reflexivity, which is why we kept the expectations of triangulation (Denzin 1970, 2018) in mind while labeling and used two researchers who reflected on each other's codes. Thus the final code categories were established. The inter-coder reliability, using Cohen's Kappa statistic, yielded a coefficient of 0.672, which means that according to the Landis and Koch agreement interpretation scale (Landis and Koch 1977), the coders reached substantial agreement in coding the answers.

While coding, we also collected narratives. In the case of individual conceptual units, we applied labels and collected narratives for them, and the analyses were carried out with these. The narratives are presented in the table 2.

The conceptual units and labels, we collected and analyzed the texts and opinions extracted from the interviews. In the analysis, we compared which interpretation of religion is associated with which experience of punishment. We interpreted the results in four steps:

a) We assigned inmates to the different narratives and experiences of the religiosity if they typified the given element.
b) We did the same with different aspects of the interpretation of punishment.
c) We investigated how many times expressions specific to a given religious and punishment narrative were mentioned.
d) We created a summary table of the number of inmates belonging to the different narratives and how often these narratives occurred in the interviews.

4. Results

4.1 Prisoners' Religious Self-interpretation

The religious reframing of life events appears in the following interviews. We considered it essential to investigate the relationships between judgment, their assessment of it, and faith. How does the prisoner feel about what God can do with their life and judgment? What kind of new life does it offer? Does this carry the possibility of becoming better? Does it cause a behavior change? The power of faith and religion in enduring punishment appears in what the inmates say. At the same time, the possibility of redemption appears in religion. This is how the reframing of the interpretation of sin and punishment appears: "God loves me very much, and that's why I received this punishment," which is also a handhold.

> FT8: "And Religion is what not only gives meaning to a person's life but also helps through this difficulty in life."
>
> F13. "/... / If this God exists, because he does, how can I get in touch with him? What does he know, or what does he want to do with my life? I received the judgment, I received a significant judgment /... /"

We did not formulate a question about the motive for forgiveness in advance, but the interviews showed that this is an essential element of religiosity for some. The desire to be forgiven and to forgive others appears in the interviews. Those for whom it does tend see their crime as unforgivable in human terms, so they hope that God can forgive them.

> FT5: "/... / If Jesus Christ could forgive those who humiliated him, hated him, spat on him on the cross. Then, I also have to forgive those people, whether a judge, a police officer, an accomplice, or even the person who reported me, for example. Or even to a father who did not raise me. /… / If my relatives, my family, have forgiven me, even though I killed a person."

> FT13: "In the Gospel of Matthew, I learned there is no sin that God does not forgive, either in depth or quantity. And I say, then I also have a chance for God to fix everything I destroyed with all my might."

The dimension of religion related to personal faith appeared in the narratives. In addition to the assessment of religion, we were curious about the role and experience of faith, and its interpretation by the inmates. The answers that appear here can be grouped distinguishably. For some, faith is the basis of their religiosity. Such inmates say personal faith has become an immanent part of their individuality, determining their relationship to everything else. In those cases, a deep and substantive faith experience is lived through (deepened faith).

> FT2: "Well, I think faith means life. I believe that we received life from God, and life means faith so that you can live without faith, but you shouldn't."

> FT4: "Well, the most important thing is my faith in Jesus and following their path. That's what Religion means."

> FT5: "I have it in my heart that God's work must be done with full devotion, either in praises or in readings, continuously."

> FT15: (to the question: What does Religion mean to you?) "A new life. A new life, which set a completely different perspective on life and people. /… / Of course not for my glory, because, thank God, I no longer act for that, but for the glory of God."

> FT7: "What is important is that here I managed to step on the path that leads to Jesus Christ."

In other cases, prisoners mostly grasp formalities instead of living the faith, trying to give an answer that they thought was formally correct. This can be seen mainly in the short, lesson-like wording of the answers or in the emphasis on actions that the prisoner thought were good and worthy of recognition.

> FT11: "I talked to the laundry manager, and there I had all the priest's church vestments and flags washed, dried, and ironed at my own expense."

> FT12: "Well, religion, faith, God, faith in God, love, hope, love."

In the case of some prisoners, skepticism towards faith appears:

> FT1: "All my life, I believed in nature, science, and aviation. I believe what I see. A man from afar says what he wants. /... / I told him not to pray to God but to me because I gave everyone money."

Another inmate was very controversial. In his interview, the belief in the existence of God and the experience of religion only in externals are mixed in a contradictory way. This inmate is also characterized by skepticism.

> FT6: "But in the meantime, I visited the churches and always minded to be in a close relationship with God. /… / My friend was religious; he went to church, but he was a superstar in the underworld, the strongest guy in Vojvodina. /... / he was religious; he had a picture of him with crosses and everything; he even had a gold cross."

For other inmates, personal faith combines multiple motives from multiple religions. It cannot be said that they are characterized by a developed image of God, rather by an aspiration for some broadly interpreted spirituality. These inmates can also be considered religious (spiritual) pathfinders. A personal belief characterizes them. The difference between them and those characterized by a deepened religious life is that they are not closely connected to any church or religion. It contains the elements characteristic of Christianity alongside motifs from other religions.

> FT10: "I believe that there is one God. In practice, they can call it something else because I think that, obviously, they couldn't give it the same name in India or other parts of Asia as in Christianity. So, I went to a Buddhist community. I lived with the Krishnas for three months and was interested in these things. /… / But the faith in Jesus is perfect for me, and I can stay in it calmly, and I have never lost my faith."

> FT14: "I tried oriental things; I did that during trips. I looked at Buddhism, I looked at the Muslim Religion, I looked at every single Religion. I was looking for what I saw in it."

As mentioned above, rites were one of the subjects investigated, that is the religious acts through which prisoners practice their faith. Here, we omit the interview because all detainees follow the traditions of Western-type Christian churches, read religious documents, pray, go to religious community events, and participate in religious rites according to their denomination. The exceptions to this general statement are those characterized by religious skepticism. In their case, religious acts mean contact with a church person.

4.2 Interpretation of Punishment

A group of answers emerges in which the interviewees deny the act that they are accused of. Some deny the crime entirely and consider themselves innocent of everything. Accordingly, they consider the verdict unfair.

> FT2: "My judgment is fiction /… /"
>
> FT 11: "I got 35 years for a crime I didn't commit."

Others partially admit their responsibility, claiming that they participated in the commission of the given crime, but deny the specific behavior for which they face the most severe punishment. That is, they partially dispute and reject the sentence imposed on them.

> FT8: "Starting with being shot in the stomach and arrested, without any reason, of course. /… / Since my conviction, you can almost say that a wonderful event has happened to me. /… / I asked the Holy Spirit for help /... /. The moral victory is mine."
>
> FT10: *"/... /* because the judge's verdict is not the same as the indictment, and what a person commits is not the same etc. /... / There is an expert opinion according to which the place where"

FT8 sees his action and the judgment he consequently received in a very complex way. He does not deny the series of acts in which he was involved, but considers his role in them to be positive. He denies the specific conduct for which he was convicted and thus sees himself as a kind of victim.

Another category consists of those who admit to having committed the act; some even accept that they deserve punishment for it but show little remorse; at most, they regret their own spoiled life. FT1's response includes the acknowledgment but also tries to share the responsibility with others. They were among the few who discussed the act committed. To preserve anonymity, we only cite responses typical of the attitude to responsibility. Such as:

> FT1: "I deserve the punishment but did not commit this act alone. The only thing that would be important is for those who participated in this to look at themselves. /… / That's when the shooting happened. /… / I shot nine times at four people. /… / Before that, there was accountability."

FT1's words reflect the intention of avoiding and reducing responsibility through the term "happened," they speak of their act as if it was not their own doing but something caused by reasons beyond their control. The term "shooting" expresses spontaneity and possibility. Meanwhile, the sentence "before it was a reckoning" expresses the exact opposite, a deliberate intention. So, the admission and the avoidance of responsibility are present in this interview simultaneously. However, he then speaks resignedly about the punishment: "/... / I deserve the punishment."

In this group, FT6 deserves a special mention; he actually sees his act, for which he was convicted, positively:

> FT6: "By killing that mobster in Serbia and saving Serbia, not only my friend's life but they would have been further terrorized and destroyed more than ten thousand families, /... /. I was the sane one; I protected the people, and now they claim that I mean danger to society because I killed. /... / Well, and I say that I always feel that people don't want to understand that you killed, and that's why you got life imprisonment. Still, if we look at the circumstances, I could even get an acquittal because if we consider the circumstances, according to the Penal Code, I can receive an acquittal because of means of last resort; /... /."

The third category includes those who admit to having committed the act and accept that there was a punishment for it but, at most, dispute its extent. At the same time, they repent their action and the harm caused by it; they show remorse.

> FT3*:* "Unfortunately, this was a bad decision, a crime committed on impulse. That's all I can say. /... / Penalty? Yes, the person deserved it; they committed the crime, couldn't do anything, accepted it, and regretted it. They showed remorse and pleaded guilty, which the court imposed on me, and I accepted."

> FT4: "Well, the punishment is very difficult to understand, I think it can never be accepted, so I try to live it as if the Lord is testing us." (He received an end of life sentence punishment.)

In subsequent analyses, we considered them as having regretted their actions because, from the perspective of regret, it is less important that they consider the punishment they received to be excessive.

Finally, there are those interviews in which the detainee firmly accepts the commission of the crime and does not dispute the amount of the punishment, considering it fair. Among these, those who speak of living the punishment as a test bear witness to a particularly intensely lived faith. This motive is based on religion. In this case, personality development through adversity is apparent, the hope that suffering will make them better, and after withstanding the tests, a reward will await: liberation.

> FT5: "My old deeds? Well, I would slap myself. With me now. Seriously. With my current self, I ruined not only my life but also others'. Well, now there is one good thing about it. Thank the Lord that I have known Him, and we were able to convert many people, either in my family or here in prison, that now many, even 6–7 people started it all because of us. /... / The fact that I deserve the place is that I have always said that although I did not kill a person, I did not kill him, I am in prison for murder, but I did not kill him, but if I am not there, he would not even have dared to go in there. So if I did not start that act, he would not have dared to start. /... /

> I have always said that I committed that crime and realize I made a mistake. /… / The thing is that since I converted, I have seen many things completely differently, even bad things, and I dare to accept it; I dare to accept it; I dare to confess in front of everyone that I was a sinner. I admit that I was at fault. /… / Moreover, I also asked for an exemption in court, but now I say that the twenty years, as I said before, stand the test of time. Moreover, it should not be 15 or 18, but twenty years; I deserve it."

The interviewee outlines the arc of how he moved from denying the crime to admitting responsibility for the act to others and himself as well. He states that the place of initial denial, evasion, and blaming is replaced by confession, facing the crime, and repentance due to conversion in prison. Thus, the following arc emerges based on the interview: denial – blame/avoidance – conversion – insight – repentance – hope for a new/better life.

> FT15: "I received a 15-year sentence for armed robbery, kidnapping, blackmailing, theft—so apart from murder and crimes against children and the elderly, everything played a role in my life. However, I am grateful to the Lord that I managed to convert here and to the jail because this way, I feel the weight of the punishment better, and I think it is justified."

Coming to faith in prison resulted in the prisoner accepting and considering their punishment as just. They had held a very different opinion between being imprisoned and coming to faith. In their case, coming to faith and experiencing punishment have been closely intertwined. The conversion date in prison falls between the first and second-degree verdicts. For this reason, we find that coming to faith and experiencing punishment are closely related.

> FT16: "So I've been serving my sentence for 16 years; I'm here for classified murder. Unfortunately, I was in the wrong place at the wrong time. /… / I'm not saying this to make you like it, but this is where I belong. I deserve it, it's been 16 years now. It took me 4–5 years to say this is my place. I deserve it, and yes, accept it!"

They admit to committing the act, but at the beginning of the interview still attributed a more significant role to external circumstances beyond their control than their own actions. A few sentences later, beyond the initial tension, their train of thought changes: According to this changed train of thought, the subject of the interview acknowledges the legitimacy of the punishment, thereby also acknowledging their own responsibility. They had to serve 4–5 years of their sentence for this. In a few sentences about the turn of events, the mental process that moves from complete denial, even to themself, to recognizing the act, to accepting the legitimacy of the punishment is condensed. Beyond this, the subject of the interview comes to the point that they regret—moreover to repentance—the act they committed, and regret for not only their own ruined life but the lives of those they ruined, and the lives of their victim's family. At the same time, the guilt associated with the punishment does not represent absolution for this per-

Main category / subcategory	Description	Source (all interviews)	Mention (all mentions)
Experience of punishment	How they assesses their own punishment, whether they consider it proportionate to their actions. Insight into responsibility for crime and impact on society. Acceptance of the consequences of their actions.	14	41
Excessive punishment	My punishment is unfair, exaggerated, accompanied by a lot of media attention, and there is also a deflection of responsibility.	2	6
Denial of a crime	Innocent conviction, miscarriage of justice.	3	6
Repent, I deserve my punishment	He/she repents the act, accepting and experiencing punishment, expecting forgiveness from society in the long term.	9	13
Admitting a crime, but avoiding responsibility, no remorse	Accepts the punishment, but either does not accept the crime, or puts them self on a pedestal or distances them self from it, so they have no regret.	2	3
I changed because of it	Change under the influence of religion, or change under the influence of a reference person, religious framing always.	9	13
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Experience of religion, perception of religion	How the prisoner views their religion, what meanings they attribute to it, now or in the future. What does their life of faith, their belief in God, their religion mean to them? How religion can influence and shape the life of the individual.	16	69
Reference person	Mentioning someone who helps shape my faith (pastor, prison staff, fellow inmate).	7	12
Resolution, reframing	The faith allows me, even if I'm guilty in the eyes of society, to be absolved, I don't have to do anything to feel that I'm important somewhere - outwardly.	14	16
Forgiveness	Forgiveness for themselves and for others (even those who have acted against them), for them it's in the religion - inward looking.	5	7
Transcendent faith	At the heart of religiosity is faith in God.	8	15
Religion as tradition	"Learned religiosity." What matters most is the framework.	3	2
The power of rites and community	In prison, rituals and repetitive moments are valued.	11	16

Table 2: *Categories of experience of punishment and experience of religion, perception of religion.*

son, who is faced with the fact that they cannot make good the consequences of their actions, which both they and the deceased victim's family continue to bear even after the punishment.

> FT14: "Totally okay. [The punishment she received. Author's note] It may sound stupid because I want to be released sooner, honestly. But regardless of it, the sentence is fair."

> FT13: "People don't understand why they had to get into this situation. They made a bad decision once, and then society threw them out. /... / I

Inmates' code	Interpretation of religious						Interpretation of punishment			
	Religious-reframing	Forgiveness	Personal-faith (transcendent)	Religion-as-tradition	Skepticism toward religious-belief	Spiritual-pathfind	Deny-the-crime	Admit-without-regret	Admit-and-repent-the-act	Didn't-mention-punishment-or-crime
FT1					X					
FT2			X				X			
FT3			X						X	
FT4									X	
FT5		X	X						X	
FT6	X				X			X		
FT7			X							X
FT8	X					X			X	
FT9				X					X	
FT10		X				X			X	
FT11				X			X			
FT12			X	X			X			
FT13	X	X	X						X	
FT14	X	X	X						X	
FT15	X	X	X						X	
FT16	X								X	

Table 3: *The connections between religiosity and interpretations of punishment.*

> don't care what our partner thinks because what the court imposed on me because of the crime committed, I will serve my sentence. I stood my ground and served a sentence honorably because I followed the rules."

FT13 acknowledges the legitimacy of the punishment, but the thought expressed in the third person suggests that he is trying to remove this life situation from himself. This changes in the later part of the interview—after the bracketed part in the quote—and the singular speaks of itself in the first person. The motive of guilt appears in the punishment. He believes that he is guilty of what he did. Moreover, in the serving of punishment, the motives of honor and perseverance appear.

In this view of the motives of regret and forgiveness there is no difference between those who dispute the amount of punishment and those who accept it. Instead, it reflects the legal knowledge of the individual (disputing some qualifying circumstance), the knowledge of the differences in judgments arising from different jurisprudence (others received less for the same act), or the differences resulting from their age at the time of sentencing. Therefore, in the following, we attach importance to when inmates admit their guilt and consider the punishment for the crime they committed to be deserved.

Table 3 summarizes the different perceptions of religion and punishment. The prisoners cannot be characterized by a single perception. Of course, forgiveness and personal transcendental faith are not mutually exclusive, but there are, however, mutually exclusive interpretations such as personal faith and skepticism. From the perspective of the research questions, it is noteworthy that of the eight individuals for whom transcendental faith is characteristic, personal regret for the act committed and repentance is characteristic of only one. On the other hand, those who interpret religion only as a framework denied the committed act or did not talk about it. Confession without remorse is characteristic of skeptics. All this suggests that personal transcendental faith is the religious perception that can lead the prisoner to repentance, which is most appropriate for the purposes of punishment.

5. Discussion

We examined what religion meant to the prisoners. What promises do the inmates make for the future? What kind of change will coming to faith bring to their lives and character? The RNR model detects criminogenic needs and formulates recommendations for their treatment. In recent years, it has focused primarily on the relationship between dynamic risk factors and religious education. Jang and Johnson have examined the impact of religion on moral needs (Jang and Johnson 2022). Their findings suggest that intensive religious education contributes positively to the reframing of life events and the development of personality-defining moral values, such as forgiveness. They point out that religion helps inmates realize the meaning and purpose of life within prison walls, helping them to find a positive outlook and purpose despite the apparent difficulties of social isolation, deprivation, and future life (Jang and Johnson 2023). Jang et al. (2022) also point out that religious practice positively correlates with forgiveness, empathy, and self-control. Through this, religion can help in achieving the goals of punishment. The desire for forgiveness and the ability to forgive presupposes recognition of guilt and the need to resolve the resulting conflicts. Religious education can deliver something in positive personality change, which can result in a shift away from the criminal personality (Duwe and Johnson 2023, Maruna et al. 2006).

In line with this, we suggest that, among the many different understandings of religiosity, the experience of personal faith may be the one that is most likely to

trigger a favorable turn. Becoming a believer, that is, becoming a disciple, can lead to religion and its teachings becoming an inherent part of the personality. Personal belief may be able to change personality in such a way and to such an extent that the individual turns against his or her former criminal behavior.

The issue of forgiveness appears in the narratives of prisoners who have come to faith, both from the victim or community towards the perpetrator for their actions, as well as forgiveness from them to those who harmed them. According to Foucault's Essay on the Technologies of the Self (1988), Christianity is a confessional religion that holds the individual responsible for discovering who they are and what is going on in the depths of their own soul; they are required to recognize temptations, localize desires, and admit mistakes (Sluhovsky 2017, Xiaoyan 2024).

Several studies have attempted to demonstrate the relationship between substance use, the development of social relationships and behavioral patterns, and religious education in prison with a variety of results (Schaefer et al. 2016, Stansfield et al. 2016, Hallet et al. 2016, O'Connor and Perreyclear 2022). The outcomes of religious education are not always convincing. One possible reason for this may be that the subjects' self-interpretation of religiosity can be very diverse, and personal faith does not always dominate. Also, researchers examining the correlations between respect, order, honor, the pursuit of a better social life, on the negative side, the pursuit of revenge, and religiosity in prison, taking into account the degree of religiosity, suggest the importance of the quality of religiosity (Reiss 2002).

Further findings suggest that participation in religious education promotes moral rejection of the committed act, i.e. the development of repentance (Jang and Johnson 2022, Jang et al. 2023, LaBarbera 2025). This can be a turning point in an individual's life, leading to moral rejection of their previous actions. Our research focuses on which of the possible interpretations of religiosity may be related to the development of repentance. This approach further deepens the scientific discourse because our results suggest that among the various interpretations, personal transcendent faith may be suitable for the development of a sense of guilt. Religiosity as a tradition, framework, and religious path-finding as a non-church faith does not have such a well-articulated effect. Most religious programs aim to promote repentance and moral development (Eytan 2011, Jarrett et al 2024). Most prison programs aim to strengthen responsibility, personality development, and acceptance of social morality. Among these programs, religious education stands out because it seeks to achieve social goals through the means of reaching transcendent faith, thus connecting vertical and horizontal religiosity.

Every believer must reveal their sins either to God or to the members of the community (that is, to have private or public witnesses against them). Faith's commitment to truth and the self are related in this way. Their relationship also means that the soul can only be purified through self-knowledge. Simultaneously and paradoxically, confession of sins erases them, but exposes the sinner. The confession of sins represents a break with former identity: it reveals the truth in a way that shows the sinner and creates the identity of the »sinful man.«

6. Conclusion

Religious reframing mainly means that, in their case, religiosity helps these prisoners to interpret their life events, themselves, and their relationship to the world in a religious way. Personal faith can be lived in many ways. In this research, we distinguished between four types: in-depth, formal, skeptical belief, and religious wayfinding.

Of those we judged to have deepened their faith, two partially admit their crime, another six fully admit their responsibility, only one inmate categorically denies the offense. Those who live their faith more deeply take responsibility in a typical way. Most of them do not even dispute the extent of the punishment. This is especially important given that all interviewees received lengthy prison sentences. Among those who firmly accept responsibility for their actions, only one inmate has faith that falls mainly into the category of way-finding, without religion being an immanent part of their personality. All of this leads to the conclusion that a profound experience of religious faith promotes responsibility. The quality of faith is also essential from the point of view of realizing the goals of punishment. The fact that the two inmates who are skeptical of religiosity admit to committing the act but show no remorse indicates a positive and closer connection between the quality of religious faith and responsibility. It also leads to the conclusion that those characterized more by formal faith either denied the crime or did not talk about it.

For RQ1, our results suggest that a deep, meaningful experience of religion can bring something positive in terms of recognition of the crime and the acceptance of its punishment. Forgiveness appears in relatively few statements. This may be because there was no direct question about it in the interviews. However, it could be telling that those who, despite this, do show forgiveness in their religiosity, to some extent, acknowledge their offense and accept the punishment imposed for it. This correlation allows us to conclude that many who admit their crime long for forgiveness. In the case of those who admit their responsibility, the motive of regret also appears. The interviews show this regret is not secularized but strongly religious. It indicates that those who admit their actions and show remorse are clearly motivated by forgiveness. They desire it and are themselves ready to forgive. Atonement in forgiveness can positively contribute to the achievement of punishment goals. It can, therefore, be assumed that the motives of repentance and forgiveness appearing in religiosity work against reoffending.

In response to RQ2, we suggest that the results point towards a deep and substantive experience of religiosity showing a positive relationship with the acceptance of punishment and its justice. Acknowledgment and repentance of the offense can be the first step towards successful reintegration. It is hard to imagine any reintegration without it. Repentance with a religious content is accompanied by a desire for forgiveness, an essential condition for reconciliation. An often stated objective is to prevent reoffending. It is difficult to achieve this goal with just the retaliation that punishments always carry. The religious practice in prisons

goes far beyond retribution and imbues the punishment with such value and content that it can lead to successful reintegration.

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Securing a Future for Humanity and the Planet in Times of "AI": The Need for an International Data-Based Systems Agency (IDA) at the UN

Zagotavljanje prihodnosti za človeštvo in planet v času ‚umetne inteligence': potreba po Mednarodni agenciji za podatkovne sisteme (MAPS) v okviru OZN

Abstract: In 2024, the UN General Assembly has adopted a resolution aiming for "safe, secure and trustworthy artificial intelligence systems" and the "Pact for the Future" including a "Global Digital Compact" and a "Declaration on Future Generations". It is now urgent to implement and build on the UN General Assembly resolution and the "Pact for the Future". This article suggests that an International Data-Based Systems Agency (IDA) needs to be established urgently at the UN as a global platform for technical cooperation in the field of data-based systems (DS) fostering human rights, safety, security, a rules-based international order, sustainability, and peaceful uses of data-based systems (DS) with a multilateral approach, as well as a global supervisory and monitoring institution and regulatory authority in the area of data-based systems (DS) responsible for access to market approval.

Keywords: Artificial Intelligence (AI), Data-Based Systems (DS), Ethics, Human Rights, Sustainability, Responsibility, Human Rights-Based Data-Based Systems (HRBDS), UN, International Data-Based Systems Agency (IDA)

Povzetek: Leta 2024 je Generalna skupščina Združenih narodov sprejela resolucijo, katere cilj so »varni, zanesljivi in zaupanja vredni sistemi umetne inteligence« ter »Pakt za prihodnost«, ki vključuje »Globalni digitalni dogovor« in »Deklaracijo o prihodnjih generacijah«. Zdaj je nujno, da se resolucija Generalne skupščine Združenih narodov in »Pakt za prihodnost« izvajata in nadgradita. V prispevku predlagamo, da je treba v okviru ZN nujno ustanoviti Mednarodno agencijo za podatkovne sisteme (MAPS) kot globalno platformo za tehnično sodelovanje na področju podatkovnih sistemov (PS). Slednja naj krepi človekove pravice, varnost, zaščito, mednarodni pravni red, ki temelji na pravilih, trajnosti in miroljubni rabi sistemov na podlagi podatkov (PS) z večstranskim pristopom, pa tudi globalne nadzorne in spremljevalne institucije ter regulativne organe na področju podatkovnih sistemov (PS), odgovorne za dostop do tržne odobritve.

Ključne besede: umetna inteligenca (UI), podatkovni sistemi (PS), etika, človekove pravice, trajnost, odgovornost, podatkovni sistemi, temelječi na človekovih pravicah (PSČP), OZN, Mednarodna agencija za podatkovne sisteme (MAPS)

1. First Small Steps Are Achieved

So-called "artificial intelligence" (AI) possesses upsides and downsides from an ethical perspective. A global consensus has emerged that some action is needed to ensure that the ethical opportunities of "AI" are fostered, that all humans benefit from the ethical opportunities, and that the ethical risks are avoided or mastered. First small steps to ensure a future for humanity and the planet are achieved: The UN Human Rights Council unanimously adopted, on July 14, 2023, its latest resolution on "New and emerging digital technologies and human rights" (UN Human Rights Council 2023) which addressed for the first time the promotion and protection of human rights with explicit reference to "AI". The Resolution emphasizes that new and emerging technologies with an impact on human rights "may lack adequate regulation", highlighted the "need for effective measures to prevent, mitigate and remedy adverse human rights impacts of such technologies" and stressed the need to respect, protect and promote human rights "throughout the lifecycle of artificial intelligence systems". It called for frameworks for impact assessments related to human rights, for due diligence to assess, prevent and mitigate adverse human rights impact, and to ensure effective remedies, human oversight, and accountability.

On March 21, 2024, the UN General Assembly unanimously adopted a resolution "Seizing the opportunities of safe, secure and trustworthy artificial intelligence systems for sustainable development" (UN General Assembly 2024) on the promotion of "safe, secure and trustworthy" "artificial intelligence (AI)" systems that will also benefit sustainable development for all. It emphasizes: "The same rights that people have offline must also be protected online, including throughout the life cycle of artificial intelligence systems."

On September 22, 2024, the UN General Assembly adopted the "Pact for the Future" including a "Global Digital Compact" and a "Declaration on Future Generations" (United Nations 2024).

These are small steps in the right direction and represent first significant foundations for a future where all humans can live a life with human dignity and the planet enjoys sustainability. At the same time, it becomes clear if one poses the following test questions that these first small steps are not enough and increase the necessity to implement and build on them:

a) Can human rights-violating state actions or business practices be concretely stopped because of these steps? No.

b) Do multinational technology companies need to change anything regarding their human rights-violating business practices because of these steps? No.

c) Can states or multinational technology companies be held accountable for their human violations based on these steps? No.

These negative responses as well as the following realities undermine that more needs to be done:

- In the year 2025 it is still possible, e.g., to put on the market an app that sexualizes children's images (Lensa 2024; Heikkilä 2022), and the only thing that happens to this company is that it makes a lot of money from it. We need to do something about this! Urgent action is needed.
- In the year 2025 it is now possible with "social media" to destabilize within a few hours a peaceful, functioning, and wealthy country (e.g., the UK far-right riots 2024) (Cadwalladr 2024).
- In the year 2025 it is now possible with "generative AI" to destroy a politician or business leader with a "Hollywood-quality" deep fake (Verma and Zakrzewski 2024).
- In the year 2025, the energy-consumption (Ren and Wierman 2024) and water-consumption (Gordon 2024; Ren and OECD 2023) by "AI" is exploding.
- In the year 2025, the global "digital divide" is growing (International Labour Organization 2024).

"Artificial intelligence (AI)" has ethical implications: opportunities as well as risks. "AI" can be powerful for fostering human rights and sustainability, but can, at the same time, be dangerous in violating human rights and in its ecological negative impact. Elon Musk who needs to be criticized for many aspects from an ethical perspective but is definitely not someone who could be blamed for being against technological progress, has warned that "AI is far more dangerous than nukes [nuclear warheads]. Far. So why do we have no regulatory oversight? This is insane." (Clifford 2018)

The late Stephen Hawking pointed out: "Unless we learn how to prepare for, and avoid, the potential risks, AI could be the worst event in the history of our civilization. It brings dangers, like powerful autonomous weapons, or new ways for the few to oppress the many. It could bring great disruption to our economy." (Kharpal 2017)

2. Data-Based Systems (DS) Rather Than "Artificial Intelligence"

So-called "artificial intelligence" can be defined as striving by technical means to imitate or fulfill cognitive functions of human thought. In the course of an ethical critique of so-called "AI", it becomes clear that so-called "artificial intelligence" does not comprise the sum of human knowledge, nor is it objective, fair and neutral. It is only based on certain data, which increasingly includes the data that so-called "generative AI" (such as ChatGPT) generates itself. As a result, so-called "AI" is getting dumber and dumber.

From an ethical standpoint, the above-mentioned starting point regarding so-called "AI" is criticized because intelligence does not just consist in the solution of a cognitive task but also in the way it is pursued (Misselhorn 2018). In view of the nature of so-called "AI", doubts arise from an ethical perspective if the term is even adequate, because so-called "AI" strives to imitate human intelligence, but this is limited to a certain area of intelligence (e.g., certain cognitive capacities) (Dreyfus 1972; Dreyfus and Dreyfus 1986). Furthermore, it is to be assumed that so-called "AI" can at best become like human intelligence in certain areas of intelligence but can never become the same. Among others, in the domain of emotional and social intelligence, machines are only able to simulate emotions, personal interaction, and relationships, and lack authenticity. For instance, a health care robot can be trained to cry when the patient is crying, but no one would argue that the robot feels real emotions and cries due to them. On the contrary, one could train the exact same robot to slap the patient's face when the patient is crying, and the robot would perform this function in the same perfect way. The lack of authenticity of robots in health care is problematic for respecting the dignity of all humans (Turkle 2007). As it is relevant to the respect of human dignity, authenticity must be part of the equation in data-based health care and in the use of "care robots" (Manzeschke 2019).

Beyond that, in the domain of moral capability, one cannot ascribe machines with moral capability because they are presupposed to follow patterns and rules given by humans. Technologies are primarily made for their suitability and may set rules as a self-learning system, for example, to increase their efficiency, but these rules do not contain any ethical qualities. E.g., a self-driving car could set the rules for itself, but it is not aware of the ethical quality. It could give itself the rule to get from A to B as fast as possible including harming humans and nature, to optimally fulfill the task of reaching B in the shortest time possible, without being able to recognize ethical rules for itself, which would allow the machine to perceive the illegitimacy of its rules and actions. A human driver instead possesses the potential to recognize for himself or herself binding ethical rules, which empower him or her to see that harming humans and nature might be more efficient but illegitimate. Machines lack this autonomy. Autonomy encompasses recognizing and setting ethical norms for oneself and basing one's own actions on them. Humans can set the rules for a self-driving car, whether good or bad. Machines fail on the principle of generalizability. This principle has its roots in Immanuel Kant's universalization principle that ethical rules can only be ethical rules if we want them to be universal law (Kant 1974). Based on this, the fulfillment of the principle of generalizability presupposes presenting rational and plausible arguments—"good reasons". "Good reasons" means that it must be conceivable that all humans, given their effective freedom and autonomy as well as their full equality, would agree upon these reasons—within a model of thought and not within a real worldwide referendum—on ethical grounds (Kirchschlaeger 2023). While a human can know that he or she does something ethically right or wrong, machines cannot identify the ethical quality by itself.

In addition, the potential that technologies possess in relation to ethical decisions and actions is nowhere close to moral capability because machines lack not only autonomy but also vulnerability, conscience, freedom, and responsibility, which are essential for human morality (Kirchschlaeger 2021).

Finally, sometimes ethics must go beyond principles, norms, and rules to be sensitive to the rule-transcending uniqueness of the concrete (Kirchschlaeger 2023). This accounts for the truth that in a concrete encounter with concrete people in a concrete situation, rules can reach their limit because the concrete, in its uniqueness, outranks the rule. "In general, concrete ethical, positive legal and many other norms that are generally applicable, although indispensable, are not sufficient to guarantee the basic humanity /…/. It is inevitable that we have to cross norms in certain situations in order to act humanely, but this does not mean that we deny the need for norms in general or refute that they are generally applicable." (Virt 2007, 42–43) Through the increasing complexity of everyday reality—e.g., when guiding principles diverge or collide—humans are challenged to find ethical insights into the ethical assessment of a concrete encounter with concrete persons in a concrete situation. These ethical considerations in a more differentiated and better manner would be expecting too much of machines due to their lack of moral capability. Transferring ethics completely to mathematics, programming, or training becomes difficult or even impossible.

Therefore, technologies cannot perform as moral subjects or moral agents, but humans carry the ethical responsibility of machines. Humans must lay down ethical and legal principles and norms; set a framework, goals, and limits for machines; and define the use of machines in addition to examining, analyzing, evaluating, and assessing technology-based innovation from an ethical perspective.

The term "data-based systems (DS)" would be more appropriate than "artificial intelligence" because this term describes what actually constitutes so-called "artificial intelligence": generation, collection, and evaluation of data; data-based perception (sensory, linguistic); data-based predictions; data-based decisions. In addition, the term "data-based systems" allows for highlighting the main strengths and weaknesses of the present technological achievements in this field. The mastery of an enormous quantity of data represents the key asset of data-based systems.

Pointing to its core characteristic, namely being based on data and relying exclusively on data in all its processes, its own development, and its actions—more precisely, its reactions to data—lifts the veil of the inappropriate attribution of the myth of "intelligence", covering substantial ethical problems and challenges of data-based systems. This allows more accuracy, adequacy, and precision in the critical reflection on data-based systems. For instance, the untraceability, unpredictability, and inexplicability of the algorithmic processes resulting in data-based evaluation, data-based predictions and data-based decisions ("black-box-problem") (Bathaee 2018; Castelvecchi 2016; Knight 2017a; 2017b), its wide vulnerability to systemic errors, its deep exposure for confusing causality with correla-

tion (e.g., high consumption of ice-creams by children in a summer-month and high number of children car-accidents due to more mobility during vacation in the same summer-month correlate but there is not any causal relationship between the two statistics, meaning ice-cream-consumption does not cause car-accidents) (Iversen and Gergen 1997), and its high probability of biased and discriminatory data and algorithms leading to biased and discriminatory data-based evaluations, predictions, and decisions embrace its major disadvantages (Coeckelbergh 2020; UNESCO 2024). "Algorithms are opinions embedded in codes. They are not objective." (Demuth 2018) They are not neutral. They serve specific goals and purposes. They are highly complex math with enormous amount of data – nothing more.

Finally, this terminological sharpening does not exclude the possibility of relying on and learning from the existing research and discourse on so-called "AI" (including, e.g., "knowledge-based systems") and its technological and normative dimensions.

3. Exclusive Responsibility of Humans

The previous considerations suggest that, due to the lack of moral capability of machines, humans have the exclusive responsibility for machines. DS cannot act as moral subjects due to their lack of autonomy as elaborated above. The definition of ethical and legal principles and norms, of a framework for DS as well as ethical decisions belong in the hands of humans. This is because the potential that technologies have in terms of ethical decisions and actions is nowhere near the moral capability of humans, as machines lack not only autonomy, but also vulnerability, conscience, freedom and responsibility that are essential for moral capability (Kirchschlaeger 2021). People also have a responsibility to examine, analyze, and evaluate technology-based innovations from an ethical point of view and not to realize everything that is technically feasible. It is also important to take into account the complexity of ethics, which includes the "dual use" problem, ambivalence, and the above-mentioned rule-transcending uniqueness of the concrete (Kirchschlaeger 2023). Due to their lack of moral capability, DS reach their limits here. A complete transfer of ethics to mathematics, programming or the training of machines proves to be impossible due to the complexity of ethics and the lack of moral capability of DS.

The ethical responsibility of humans for DS also means design responsibility: DS do not simply fall from the sky or are predetermined by nature, but it is up to humans to decide what and how DS are designed, developed, produced, deployed and used, or not used due to ethical concerns. The latter also includes the responsibility to use DS in a targeted manner where they serve humanity and the planet, and to develop DS in those areas of human intelligence where they already massively outperform humans – such as handling large amounts of data, data storage, computing power, and logical deduction. DS can substantially support human thinking by storing facts and perceiving complexity.

4. Sharing Ethical Benefits and Mastering Ethical Risks by Global Governance of DS

"Data-based systems (DS)" comprise ethical opportunities and ethical risks. DS can be powerful, e.g., for fostering human dignity and sustainability, but also for violating human dignity or destroying the planet. DS can make an important contribution to the promotion of human rights. For example, DS can be used to design new drugs based on protein structures (Atz et al. 2024). With the help of DS, tumor diseases can be classified more precisely than before in terms of their threat level (Zhang et al. 2024). DS offer enormous ethical opportunities.

When dealing with the ethical opportunities and risks of DS, the following two errors of thought are all too often made in the ethical discourse, which should be avoided: Firstly, ethical dangers could supposedly be offset by ethical opportunities. Secondly, human rights violations are accepted if great benefits are expected from DS. These are two errors of reasoning, because a violation of human rights with or through DS can neither be outweighed by the positive ethical potential of DS in terms of human rights nor by a high return, since human rights are at stake, so that every single violation of human rights proves to be ethically unacceptable.

This makes the ethical risks all the more significant. Humans need to become active so that DS do not simply happen, but that humans shape it. This is necessary so that DS will not be reduced to an instrument serving pure efficiency (Kirchschlaeger 2025c) but can rise to their ethical potential. More importantly, there is a need for normative guidance to review the economic self-interests that run DS so far almost exclusively and to guide calls for global regulations and governance in the digital domain and in the sphere of DS to ensure that all humans and the planet share the ethical benefits of DS and that the ethical risks of DS are mastered.

This is of essential significance not only because of, but especially in a time where multinational technology-companies who are the decisive driving-force of this technological progress officially and explicitly step down from their ethical responsibilities. For example, Meta announces that it will stop its ethically informed moderation of the content (e.g., fighting racist and sexist hate speech as well as incitements to violence) on their social media-platforms (Isaac and Schleifer 2025). Google, for example, removes their "Responsible AI Principles" which it has so far used to engage in technologies violating human rights as well as in technologies for surveillance and for causing harm (e.g., DS for weapons) (Tiku and De Vynck 2025). These are just additional pieces of explicit evidence (Zuboff 2019) that self-regulation of multinational technology companies will not really happen nor work.

5. Existing Global Governance Initiatives

The debate about the international governance of DS (Kirchschlaeger 2024a; 2024d; 2024e) encompasses several declarations, recommendations, principles, and guidelines—the first generation of governance initiatives: "the sermons." Different

initiatives by states and civil society on national level exist (Agency for Digital Government 2024; Amnesty International 2025; Association for Computing Machinery 2017; Australian Human Rights Commission 2019; Beijing Academy of Artificial Intelligence [BAAI] 2019; Commission Nationale de l'Informatique et des Libertés [CNIL] et al. 2018; Fairness, Accountability, and Transparency in Machine Learning [FAT/ML] 2016; Future of Life Institute 2017; House of Commons of the United Kingdom – Science and Technology Committee 2018; Japanese Society for Artificial Intelligence [JSAI] 2017; Montréal Declaration 2018; Partnership on AI 2024; The Public Voice Coalition 2018; Swiss Federal Council 2020; Villani 2018). On a regional level, states and civil society have contributed to this debate (European Group on Ethics in Science and New Technologies 2012; 2014; 2015; 2018a; 2018b; High-Level Expert Group on Artificial Intelligence HLEG AI of the European Commission 2019; Council of Europe 2018a; 2018b; 2018c; 2019a; 2019b; The Charter of Digital Rights by European Digital Rights (EDRi) - network, 2014). On an international level, contributions by state and non-state actors enter the spotlight (CNIL et al. 2018; Partnership on AI 2016; The Public Voice Coalition 2018; UNESCO World Commission on the Ethics of Scientific Knowledge and Technology [UNESCO COMEST] 2017; Information Technology Industry Council [ITIC] 2017; Dutton 1990; Price 2018; D 64 Zentrum für Digitalen Fortschritt 2018; UNICEF 2017; Association for Computing Machinery's Committee on Professional Ethics 2018; WeGovNow 2020; The Future of Privacy Forum 2018; UNI Global Union 2017; Institute of Electrical and Electro-nic Engineers [IEEE] Standards Association 2024; Internet Governance Forum [IGF] 2014; 2019; ISO 2020; the "Bletchley Declaration 2023" (AI Safety Summit 2023), the "AI4People Summit Declaration," the "G7 International Guiding Principles on AI," the "AI Code of Conduct," the "Recommendation on the Ethics of Artificial In-telligence" by UNESCO, the OECD Principles on Artificial Intelligence (OECD 2019), the G20-Principles of AI, "Declaration of Principles" by the World Summit on the Information Society in Geneva 2003 (World Summit on the Information Society [WSIS] 2003). Contributions from professional ethics—e.g., the code of the Institute of Electrical and Electronic Engineers (IEEE Standards Association 2024), the code of the National Society of Professional Engineers (NSPE 2019) or the codes of the American Society of Mechanical Engineers (ASME n.d.) emerge together with other proposals. The main challenge with these declarations, recommendations, principles, and guidelines—with "the sermons"—is the step from theory to practice. They remain at maximum "soft law" "which is a tool often used to either avoid or anticipate formal legislation" (Nevejans 2016, 26). Beyond that, the European Par-liament and Council reached political agreement on the European Union's Artificial Intelligence Act ("EU AI Act") (European Parliament 2023). The EU AI Act aims to represent a comprehensive legal framework for the regulation of AI systems across the EU, ensuring the safety of and respect for fundamental rights by DS as well as encouraging investments and innovation in the field of DS. In addition, the Council of Europe Framework Convention on Artificial Intelligence and Human Rights, De-mocracy and the Rule of Law was adopted on May 17, 2024, by the Committee of Ministers of the Council of Europe (Council of Europe 2024).

Other legal initiatives—forming together with the EU AI Act the second generation of governance initiatives: "the locals"—are also pursued in China and in the USA on the federal level, and several governments on the state level released new regulations, leading to the categorization of these activities as "American Market-Driven Regulatory Model", "Chinese State-Driven Regulatory Model", and "European Rights-Driven Regulatory Model" (Bradford 2023, 35–145).

Finally, the debate about global governance in DS also knows the third generation of governance initiatives: "the international players"—consisting of the proposals of two main models: the model of the Intergovernmental Panel on Climate Change (IPCC) (Kaspersen and Wallach 2023) and the model of the International Civil Aviation Organization (ICAO) (Baker & McKenzie 2023; World Economic Forum 2022).

The model of the Intergovernmental Panel on Climate Change (IPCC) consists of a panel of experts. The IPCC was established in 1988 by the United Nations, with member countries from around the world. It provides governments with scientific information they can use to develop climate policies. The panel of experts in the domain of AI would provide policymakers and governments with information, scenarios, and models for their decision-making.

The model of the International Civil Aviation Organization (ICAO) (Baker & McKenzie 2023) consists of a binding global framework and its implementation. The ICAO, as a United Nations agency, has its basis in the Convention on International Civil Aviation. The ICAO is the global forum of states for international civil aviation. It develops policies and standards, provides compliance audits, studies, analyses, and assistance to states and stakeholders, and contributes to the global alignment of air regulations.

While "the sermons" lack implementation during the working week, and "the locals" possess a national or regional focus, while DS represents a global phenomenon, "the international players" locate the governance of DS on an international level and approach it adequately in an institutional manner in order to create a positive impact in reality and on the ground.

At the same time, it needs to be considered that the IPCC model will not reach the desired effect on the ground because it does not possess neither legal authority nor legal enforcement tools. This weakness of the IPCC model becomes clear listening to the UN High Commissioner for Human Rights, Volker Türk: "Victims and experts /…/ have raised the alarm bell for quite some time, but policy makers and developers of AI have not acted enough—or fast enough—on those concerns. We need urgent action by governments and by companies. And at the international level, the United Nations can play a central role in convening key stakeholders and advising on progress. There is absolutely no time to waste. The world waited too long on climate change. We cannot afford to repeat that same mistake" (Türk 2023).

Regarding the ICAO model, doubts arise if one can compare a self-contained industry like aviation to a cross-cutting technology like DS. The latter causes manifold and multifaceted legal and ethical issues (Baker & McKenzie 2023).

6. Ten Main Global Dangers of DS

From an ethical perspective, the first global danger of DS is not doing anything about the ethical risks of DS: Products with DS that violate human dignity and human rights or destroy the planet can be put on the market without legal consequences. For example, if an app is sold online that sexualizes images of children as mentioned above, nothing happens to the company offering this app except that it makes a lot of money (Lensa 2024; Heikkilä 2022; Snow 2022). For several decades now, humanity has allowed business models that have human rights violations at their core to go unchallenged.

A second global danger posed by DS is the growing inequality and poverty around the world due to a widening "digital divide" (Kirchschlaeger 2021). Expected explosive increases in computing power (e.g. through quantum computing) will explode the already existing "digital divide" in some regions of the world there is no access to the internet, other places already benefit from large data centers.

A third global danger is the negative impact of DS on the climate and the environment, which threatens to destroy the planet (Kirchschlaeger 2021). The massive demand for both raw materials for the production of DS and for energy in the production and use of DS is still disproportionate to the contribution of DS to combating climate destruction.

A fourth global danger is the constant violation of the human right to privacy and data protection (Zuboff 2019). Whenever possible, people's data is stolen and sold to the highest bidder. The ongoing disregard for privacy and data protection is a massive attack on the freedom of all people.

A fifth global danger is that with DS, thanks to these huge amounts of data about people, one can "know" people better than people know themselves. This opens the door to economic and political manipulation. With DS, you can know to use a metaphor exactly which piano keys to press to make the music play, in other words, to get people to buy or choose or vote the way the hands controlling DS want them to (Nosthoff and Maschewski 2019).

A sixth global danger is the potential for disinformation. Due to global networking online, millions of people can be targeted with false information - so-called "fake news" - at the click of a mouse. Language and image generation systems (such as ChatGPT, Dall-E), for which the criterion of truthfulness, data protection and copyright play no role and which, figuratively speaking, are nothing more than cows chewing the cud (Kirchschlaeger 2024c), open up new horizons in this respect, as artificially created audio and video material with a high degree of perfection can be circulated globally as supposed realities. For example, words can be put into the mouths of political officials that they never actually said. Unfortunately, despite official clarifications from the politicians concerned, some of the untruths remain in people's minds - with "fake news" in images even more than in words (Kirchschlaeger 2021).

Linked to this, a seventh global danger is the possibility of targeted destabilization of societies through hate speech and incitement to violence spread on the internet - especially on social media - where masses can be mobilized at the click of a mouse (Cadwalladr 2024).

An eighth global danger is the risk to the mental and physical health of people (Mahari and Pataranutaporn 2024), especially children and adolescents, due to the effects of DS, including "social media". Among other things, the WHO is considering recognizing "social media" use as an addiction (Montag 2023) because "social media" has the following traits: "The internet is a giant hypodermic, and the content, including social media like Meta, are the psychoactive drugs." (Richtel 2023) It would be more adequate to call "social media" "anti-social media".

A ninth global danger is cyberattacks (Kirchschlaeger 2021). Growing digitalization and an increase in the use of DS in people's business and private lives, as well as in the systemic infrastructure of societies, mean an increase in vulnerability to cyberattacks. Cybercrime and the fight against it have a massive economic impact on national economies.

The military applications of DS represent a tenth global danger (Kirchschlaeger 2024b). Automated weapon systems are unable to distinguish between combatants and non-combatants in armed conflicts and to apply the principle of proportionality (Asaro 2008), which leads to more misconduct and crime (Sharkey 2011). Another argument against automated weapons is that they would lead to more wars (Kahn 2017) because, among other things, a lower number of victims would be expected (Wallach 2015) and thus a lower political price would have to be paid (Wagner 2014).

Facing these ten global threats, the limitations of the so-far three generations of governance initiatives become obvious if one approaches this risky reality with the test questions mentioned above for the already existing "sermons", "locals", and "international actors". The already existing "sermons", "locals", and "international actors" receive also negative responses in all three cases. Therefore, it is necessary to think about ways to combine the strengths of "the sermons", "the locals", and "the international actors" and to avoid their weaknesses in order to address these global threats in an impactful and global way while still benefiting from the ethical opportunities of DS. Allowing humans and the planet to flourish sustainably and guaranteeing globally that human dignity is respected not only offline but also online and in the digital sphere as well as in the domain of DS, the below described concrete measures are proposed.

7. The Need for Human Rights-Based DS and an International Data-Based Systems Agency IDA at the UN

In order to secure a future for humanity and the planet, in order to allow humans and the planet to flourish sustainably, and in order to guarantee that human rights

are respected globally not only *offline* but also *online* – and in the digital sphere and the domain of DS – the following concrete measures need to be implemented with urgency:

a) Human Rights-Based Data-Based Systems (HRBDS): Human rights-based data-based systems (HRBDS) are meant to ensure that human rights serve as the basis of DS. In other words, HRBDS seek to ensure that human rights – including rights of the child (Kirchschlaeger 2025a) are respected, protected, implemented, and realized within the entire life cycle of DS and the complete value-chain process of DS (in the design, the development, the production, the distribution, the use, or the non-use of DS because of human rights-concerns). HRBDS strives for protecting the powerless from the powerful.

   As a minimum ethical frame of reference, human rights could provide the necessary normative orientation that they only represent a minimum standard that guarantees all humans physical survival and a life in dignity – a life as human. As an ethical minimum standard, human rights do not ethically overtax technological progress and do not stifle it, as would be the case with a high ethos. Another argument in favor of human rights is the ethical justifiability of human rights and their universality with the principle of vulnerability (Kirchschlaeger 2013b), which underpins their global acceptance. The latter proves to be unrivalled in comparison to other value systems and catalogs of norms (Kirchschlaeger 2025b), as human rights are not anchored in a specific culture, tradition, religion or worldview, but serve as a basis for the lived diversity of cultures, traditions, religions or worldviews by protecting, among other things, the freedom of belief, conscience and religion of all people (Kirchschlaeger 2020).

   In addition, human rights encourage and promote innovation and technological progress by protecting freedom of thought, freedom of expression, and free access to information (Kirchschlaeger 2013a). Finally, they protect and promote the diversity that is constitutive for innovation processes by guaranteeing the self-determination of every person, which proves to be a source of diversity (Kirchschlaeger 2016; Kirchschlaeger 2020).

b) An International Data-Based Systems Agency (IDA): An International Data-Based Systems Agency (IDA) urgently needs to be established at the UN as a global platform for technical cooperation in the field of DS (Kirchschlaeger 2021; 2024a; 2024d; 2024e), fostering human rights, safety, security, a rules-based international order, sustainability, and peaceful uses of DS with a multilateral approach and by collaborating and joining forces with other UN agencies and already existing events and formats, e.g., the World Summit on the Information Society WSIS, the International Governance Forum IGF, the AI for Good Global Summit, as well as a global supervisory and monitoring institution and regulatory authority in the area of DS responsible for access to market approval.

Given the areas of convergence between DS and nuclear technologies, the In-

ternational Atomic Energy Agency (IAEA) model would seem the most appropriate one for responsible global AI governance as it represents an UN-agency with "teeth".

IDA at the UN should fulfill the following three key-functions:

a) Providing an access to market approval-process which several other industries know since decades (e.g., the pharmaceutical industry) in order to avoid harm of humans and the environment; the access to market approval-process orchestrated by IDA should ensure that human rights-violating products (like, e.g., the above-mentioned app sexualizing pictures of children) do not even end up on the market. By this, an preventive impact is caused by IDA that the private sector does not even design and develop such human rights-violating DS knowing that they will not pass the access to market approval-process.
b) Monitoring and enforcing that human rights are not violated with or by DS;
c) Fostering international technical collaboration in the sphere of DS in order to enable humanity to reach faster and better the positive potential of DS.

While pursuing all three key functions, IDA could also rely on DS-based solutions to implement HRBDS.

The establishment of an IDA is feasible because humanity has already shown that we are able to avoid "blindly" pursuing and implementing things that are technical possible, but that we are also able to exercise caution when the welfare of humanity and the planet are at stake. For example, humans researched the field of nuclear technology but then humans substantially and massively limited research and development in the field of nuclear technology, in order to prevent even worse consequences. This restriction was successful mainly due to an international regime, concrete enforcement mechanisms, and thanks to the International Atomic Energy Agency (IAEA) at the UN - an UN-agency wish "teeth".

8. HRBDS and IDA Are Realistic

The realization of IDA is realistic because humanity has shown in the past that when the well-being of people and the planet is at stake, it can focus on what is technically desirable instead of blindly pursuing everything that is technically feasible. Humanity has also stepped up to foster ethical upsides and to stop or to master the ethical downsides of technological progress by establishing a binding global regulatory framework as well as an impactful global enforcement-institution.

E.g., humanity has pursued nuclear technology, developed the atomic bomb and even used it more than once. However, in order to prevent even worse things from happening, mankind then massively restricted the research and development of nuclear technology despite overwhelming opposition from state and non-state actors. It is mainly thanks to international guidelines, concrete enforcement mechanisms and the UN's International Atomic Energy Agency (IAEA) that nothing worse happened.

E.g., in the case of chlorofluorocarbons (CFCs), humanity also decided to ban ozone-depleting substances under the Montreal Protocol of 1987 (UN Environment Programme 1987) and to enforce the ban consistently. Here, too, there was considerable resistance, partly due to the vested interests of the private sector. This regulation and its uncompromising enforcement have led to the hole in the ozone layer slowly closing.

9. Broad Global Support for HRBDS and IDA

There is a growing international and interdisciplinary network of experts calling for the establishment of HRBDS and IDA (IDA 2024). The Elders, an independent group of world leaders founded by Nelson Mandela, has endorsed the recommendations for human rights-based DS and for the establishment of a global agency to monitor them. It has called upon the UN to take appropriate action. In their statement of May 31, 2023, the Elders declared that: "A new global architecture is needed to manage these powerful technologies within robust safety protocols, drawing on the model of the Nuclear Non-Proliferation Treaty and the International Atomic Energy Agency. These guardrails must ensure AI is used in ways consistent with international law and human rights treaties. AI's benefits must also be shared with poorer countries. No existing international agency has the mandate and expertise to do all this. The Elders now encourage a country or group of countries to request as a matter of priority, via the UN General Assembly, that the International Law Commission draft an international treaty establishing a new international AI safety agency." (The Elders 2023)

The idea of a human rights-based and legally binding regulatory framework as well as the establishment of an institution enforcing the global regulation enjoyed the support of Pope Francis (Francesco 2024).

His Holiness the Dalai Lama supports the establishment of IDA at the UN as well as human rights-based DS (HRBDS) because human rights-based data-based systems (HRBDS) and the establishment of an International Data-Based Systems Agency (IDA) at the UN foster the realization of human rights, peace, and sustainability in the sphere of data-based systems (DS) (IDA 2025).

UN Secretary General António Guterres also supports the creation of an international AI watchdog body like the International Atomic Energy Agency (IAEA): "I would be favorable to the idea that we could have an artificial intelligence agency /…/ inspired by what the international agency of atomic energy is today." (Nichols 2023) He has called for a new UN body like an "International Data-Based Systems Agency IDA" to tackle threats posed by artificial intelligence in the UN Security Council on July 18, 2023 (Guterres 2023).

UN High Commissioner for Human Rights Volker Türk has demanded at the UN Human Rights Council "urgent action" and proposed human-rights-based HRBDS and a coordinated global response towards an institutional solution like the cre-

ation of an "International Data-Based Systems Agency IDA" in his statement about AI and human rights on July 12, 2023 (Türk 23).

Also, some voices from multinational technology-companies – among others, Sam Altman (Founder of OpenAI) at the World Economic Forum WEF 2024 – have called for IDA (Santelli 2024).

Mustafa Suleyman (CEO of Microsoft AI, Co-Founder and former Head of applied AI at DeepMind, Co-Founder of Inflection AI) says:

> "We need our generation's equivalent of the nuclear treaty to shape a common worldwide approach – in this case not curbing proliferation altogether but setting limits and building frameworks for management and mitigation that, like the wave, cross borders. This would put clear limits on what work is undertaken, mediate among national licensing efforts, and create a framework for reviewing both. Where there is a clear scope for a new body or bodies is with technical concerns. A dedicated regulator that navigates contentious geopolitics (as much as possible), avoids overreach, and performs pragmatic monitoring function on broadly objective criteria is urgently needed. Think of something like the International Atomic Energy Agency." (Suleyman and Bhaskar 2023, 266)

10. Concluding Remarks

Time is running. Not only because of the enormous ecological footprint of DS. Not only because of the constantly occurring human rights violations with or by DS. Not only because of the at large scale manipulated democratic opinion-forming- and decision-making processes. Not only because of entire societies being threatened by destabilization with a targeted use of "fake news". Not only because of leaders and decision-makers in politics, society, and business fearing that their careers are put to an end by a "deep-fake". But also because of the following reality, which significantly reinforces the ethically negative potential of DS:

> "Washington and Beijing will soon discover that putting A.I. in the hands of every person and robot on the planet will superempower bad people to levels no law enforcement agency has ever faced. Remember: Bad guys are always early adopters! And without the United States and China agreeing on a trust architecture to ensure that every A.I. device can be used only for humans' well-being, the artificial intelligence revolution is certain to produce superempowered thieves, scam artists, hackers, drug dealers, terrorists and misinformation warriors. They will destabilize both America and China, long before these two superpower nations get around to fighting a war with each other." (Friedman 2025)

If we foster now human rights-based data-based systems (HRBDS) and if we

establish now the International Data-Based Systems Agency (IDA) at the UN, there will be a sustainable future for the planet and for humanity enjoying human dignity and human rights.

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Branko Klun, Luka Trebežnik (ur.)

Vračanje religije v postmodernem kontekstu

Zbornik želi pokazati, da religija ni izginila iz filozofije, kot so napovedovali nekateri razsvetljenski misleci, temveč se vanjo vrača in jo na novo vznemirja. Sicer je to vračanje raznoliko in pogosto nekonvencionalno, vendar pa to ne zmanjšuje njegovega pomena in s tem potrebe po dialogu med postmoderno filozofijo in teologijo.

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Barbara Horvat in Majda Cencič

Podpora šole pri celostnem in duhovnem razvoju učiteljev in (pozitivna) naravnanost v šoli

School Support for Teachers' Holistic and Spiritual Development and (Positive) Attitude in School

Povzetek: Celostni in duhovni razvoj učiteljev je v pedagoški strokovni in znanstveni literaturi manj prisotna tema. Več razprav in raziskav je o pozitivni psihologiji, kar je vplivalo tudi na razvoj pozitivne vzgoje in izobraževanja (PVI). Namen empirične raziskave je bil ugotoviti, kako razredni učitelji (RU) javnih osnovnih šol (OŠ) ocenjujejo, da njihova OŠ podpira medsebojno sodelovanje in učenje, pozitivna dejanja in čustva ter njihov celostni in duhovni razvoj. Avtorski vprašalnik je izpolnil nerandomiziran vzorec 81 RU iz različnih slovenskih regij. Rezultati, obdelani s pomočjo opisne in inferenčne statistike, kažejo, da se RU najbolj strinjajo s trditvijo, da njihova OŠ podpira njihova pozitivna dejanja in čustva, medsebojno učenje in sodelovanje ter njihov celostni razvoj, medtem ko so v odgovorih o duhovnem razvoju neodločeni. Kažejo tudi, da je tema duhovnega razvoja povezana s temo pozitivnega pogleda in odnosi – in da bi potrebovala več razprav in udejanjanja v učiteljski praksi.

Ključne besede: celostni razvoj, duhovni razvoj, pozitivna naravnanost, pozitivna vzgoja in izobraževanje, sodelovanje, učitelji, osnovna šola

Abstract: Holistic and spiritual development of teachers is a topic that is less present in pedagogical and scientific literature. More discussed and researched is positive psychology, which has also influenced the development of positive education (PE). The aim of this empirical study was to find out how primary school teachers (PSTs) at public primary schools (PS) perceive (evaluate) that their PS supports mutual cooperation and learning, positive actions and emotions, and their holistic and spiritual development. A non-randomised sample of 81 PSTs from different regions of Slovenia completed the questionnaire. The results, evaluated on the basis of descriptive and inferential statistics, show that PSTs are most likely to agree that their primary school supports their positive actions and emotions, their mutual learning and cooperation, and their holistic development, while they are undecided in their answers regarding their spiritual development. They also point out that the topic of spiritual development is linked to the topic of positive attitudes and relationships and needs to be discussed and implemented more in the practice of teachers.

Keywords: holistic development, spiritual development, positive attitudes, positive education, cooperation, teachers, primary school

1. Uvod

Ena od temeljnih nalog vsake skupnosti je bila od nekdaj ljudi naučiti povezovati predstave ter občutke o sebi in svetu (Ošlaj 2004). To znati je pomenilo imeti razvito zmožnost povezovanja in osmišljanja sveta, sebe v njem, posledično pa znati misliti in živeti širše oz. na ‚višji' ravni od (lastne) konkretne. Razumelo se je, da so ljudje na takšen način v sebi celi ali celostni. V pedagoški in psihološki znanosti pa so vprašanja o človekovi celostni osebnosti in njegovem duhovnem razumevanju vidneje prišla v ospredje predvsem v zadnjem stoletju in pol (Musek 2008) – v sodobni zahodni kulturi predvsem zaradi problema vsesplošne negotovosti in občutka razcepljenosti pri mladih. Trdnejše predstave in občutki se lažje razvijejo v družbah, v katerih so pričakovanja in vloge jasno opredeljene (Reckwitz 2020; Ule 2009).

Vzhodne kulture še vedno poudarjajo nepogrešljivo vlogo vpeljave posameznika v duhovni svet, medtem ko smo v naši (postmodernistični) kulturi vpeti v t. i. množtvo svetov, v vsakega z njemu lastnimi pogoji oblikovanja občutkov in predstav. Vanje smo le delno (ker jih je toliko), ne v celoti vpeti; mednje smo razklani in posledično težje (če sploh) v sebi ‚celi' oz. ‚celostni' (Lasch 1979; Ule 2009). Z besedami Kranerja (2023) – smo v okolju brez orientacije.

Domnevamo, da je tudi učitelj predvsem javne šole razpet med mnoge svetove ali t. i. sisteme, med katerimi z vidika vrednot prevladujeta dva osrednja sistema: na eni strani ‚domačijski', ki predstavlja ‚tradicionalni' sistem vrednot kot nadaljevanje nekdaj stabilnih vzorcev ravnanj in pričakovanj, ter na drugi strani sistem vrednot zahodne družbe, ki so ji lastni množični pod-svetovi z lastnimi vrednotnimi sistemi (Medveš 2020), med katerimi pa ni hierarhije. Takšno stanje v šolah že desetletja povzroča t. i. ‚krizo' v vzgoji, saj se zdi, da se šole vzgoji izogibajo in se raje usmerjajo v izobraževanje (čeprav se še vedno ohranja poimenovanje šol kot vzgojno-izobraževalnih institucij). Posledice so očitne, saj so – kot opozarja Nežič Glavica (2021a) – opazne vse pogostejše duševne bolezni mladih, ki (podobno kot odrasli) v mnoge, tudi državne institucije zaupajo vedno manj (2021a).

Glede na omenjeno učiteljeva vloga v javni šoli ni preprosta. Javna šola kot družbena institucija je orodje, ki skozi učitelja skrbi za vzdrževanje obstoječega reda (Dewey 1932; Medveš 1992). Zastavljamo pa vprašanje, ali učitelja spodbuja tudi pri ohranjanju in razvijanju njegovega tako, ‚ožje' gledano, duhovnega kot tudi, ‚širše' gledano, celostnega (povezovalnega) razumevanja sebe in sveta oz. ali je to odvisno izključno od učitelja samega.

Besedilo je razdeljeno na dva dela. V prvem, teoretičnem, na kratko predstavljamo pojmovanje celostne osebnosti človeka oz. razvoja osebnosti kot takšne, s poudarkom na njeni duhovni dimenziji. Slednjo pojmujemo kot integralni del celostnega razvoja in zato kot od tega – v tem kontekstu – ožji pojem, sicer pa

tudi kot nepogrešljiv v okviru profesionalnega razvoja učiteljev. Zadnji sicer predstavlja eno od osrednjih tem pedagoških znanstvenih besedil (Valenčič Zuljan 2001), le da ta celostni razvoj učiteljev omenjajo bolj v povezavi s celostnim razvojem učencev. Kaj celostni razvoj osebnosti izgrajuje, natančneje ne opredeljujemo, saj tudi različni avtorji – na temelju različnih teoretskih podlag – predstavljajo različne dimenzije in vidike osebnosti, ki jih v tem besedilu razumemo podobno, tj. kot značilnosti ali lastnosti, po katerih se med sabo razlikujemo, in sicer po zunanjih ali telesnih značilnostih, vedenju, mišljenju, čustvovanju, kar vse predstavlja vidike naše osebnosti oz. dimenzije (Avsec, Petrič in Kavčič 2023).[1] V kontekstu prej navedene duhovne dimenzije pa omenjamo tudi religijo. Naprej predstavljamo pojmovanje celostnega razvoja osebnosti z vidika psihološke znanosti, nato pedagoške, saj se ta pomembno naslanja na spoznanja prve.

Drugi, empirični del ponuja vpogled v prakso osnovnošolskih učiteljev in predstavlja oceno razrednih učiteljev, koliko institucija, v kateri so zaposleni, podpira njihov celostni in duhovni razvoj ter njihovo pozitivno naravnanost.

2. Teoretični del

2.1 Vpogled v celostni in duhovni razvoj z vidika psihologije in pedagogike

Znotraj psihološke znanosti se duhovnost pojmuje drugače kot religioznost, a oboje se lahko meri kot osebnostne lastnosti z instrumentom, kot je lestvica stališč (Musek 2007, 2008).[2] S pojmom religije in religioznosti avtorji (Diener in Ryan 2009) povezujejo zlasti stopnjo pripadnosti posameznika religiji, pogostosti verskih obredov in molitve; človekovo duhovnost povezujejo z občutjem »celovitosti vsega obstoječega, povezanosti, smiselnosti, obstoja višje sile (numinoznega), absolutnega, [in] ljubezni« (Musek 2007, 318). Poudarjeno je, da naj bi duhovnost vključevala tudi človekovo »poglobljenost, zavezanost in modrost« in predstavljala eno od inteligenc osebnosti, in sicer duhovno (318). S pojmom religioznosti – ne pa tudi duhovnosti – pa se vzporeja pojem vere, zato se kot sopomenka religioznega navaja veren posameznik (Diener in Ryan 2009).

Kako je z verovanjem povezana človekova duševnost, nam je iz rezultatov nekaterih raziskav znano – da so verni ali religiozni ljudje z življenjem na splošno

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[1] Lahko bi omenili le Pestalozzija, ki je pri otrocih že leta 1890 govoril o vzgoji glave (umska vzgoja), srca (moralna vzgoja) in rok (telesno-delovna vzgoja); Blooma, ki je leta 1956 navedel tri področja razvoja vzgojno-izobraževalnih ciljev: kognitivni (misel, razmišljanje), konativni (čustva, odnosi) in psihomotorični (delovanje v skladu z razmišljanjem in čustvi).

[2] Glede duhovne dimenzije osebnosti Musek (2007, 318) na primer navaja naslednjih pet postavk:
»Doživljam povezanost z vsem živim.
Moja duhovnost daje smisel dogodkom v mojem življenju.
V svetu prepoznavam navzočnost božanskega.
Čutim povezanost z izvirom vsega življenja.
V svojih odnosih z drugimi izražam in prejemam ljubezen in odpuščanje.«

bolj zadovoljni kot nereligiozni (pri čemer na izpostavljeno zadovoljstvo, kot je navedeno, vplivajo stopnja pripadnosti religiji, pogostost obiskovanja verskih obredov in udeležbe v molitvi). Z drugimi besedami – bolj kot je vse našteto pri posamezniku prisotno, bolj kot se čuti pripadnika religije oz. vere, in pogosteje kot moli, bolj naj bi se čutil izpopolnjenega (Diener in Ryan 2009; Ellison 1991; Myers 1992; Pollner 1982). To naj bi bilo povezano s tem, da pripadnost religiji posamezniku ponuja večji občutek smisla v življenju in izpolnjenosti življenjskih ciljev, obenem pa močnejšo socialno mrežo (Ivtzan et al. 2013). Zato naj bi bilo za vse, ki prakticirajo religijo (religiozni ljudje) in preostale (verne), ki kakorkoli poročajo o višje izraženi duhovnosti, značilno izkazovanje višje izraženosti samoaktualizacije, smisla življenja in tudi več teženj po osebni rasti (2013).

Po Musku (2008) se v zadnjih desetletjih z vprašanjem duhovnega in verskega doživljanja vidneje ukvarja predvsem na humanistično psihologijo oprta pozitivna psihologija, ki pozornost usmerja na pozitivne vidike človekove osebnosti, medtem ko je bila psihološka stroka pred tem osredotočena predvsem na proučevanje »duševnih motenj, bolezni in težav« (Gradišek 2023, 9). Proučevanje, razvijanje in uporaba pozitivnih psiholoških vsebin pa so se prenesli tudi na področje vzgoje in izobraževanja (2023).

Naši uradni pedagoški dokumenti koncept celostne osebnosti človeka in razvoja osebnosti kot takšne omenjajo le v posameznih besedilih in, kot smo omenili, predvsem v povezavi z otroki. Pri tem navedenega koncepta ne opredeljujejo eksaktno, zato vsaj mestoma predstavlja pojmu »vsestransko razvite osebnosti« podoben in tako izmuzljiv pojem. Iz *Bele knjige o vzgoji in izobraževanju v Republiki Sloveniji* (2011) je mogoče razbrati, da avtorji celostni razvoj pojmujejo kot »vsesplošni razvoj«, ki predstavlja eno od načel vzgoje in izobraževanja, znotraj katere naj bi uresničevali »celovit razvoj« posameznika (Krek 2011, 18). Kaj točneje to pomeni, ni opredeljeno. V *Kurikulu za vrtce* (1999) pojma celostne osebnosti in razvoja takšne osebnosti nista posebej navedena, je pa izrecno pojem »vsesplošnega razvoja«. Kot piše, je »v ospredju /…/ vzgoje /…/ omogočiti otrokov vsesplošni (duševni in telesni) razvoj.« (9)

Tudi v domačih znanstvenih revijah je razmeroma malo besedil, v katerih bi avtorji eksplicitno pisali o celostni osebnosti in razvoju celostne osebnosti. Izstopata, denimo, prispevka „K celostni podobi človeka“ Kovačič Peršina (2007) in Bucikova (2013) „Pomoč psihologa vzgojiteljem in učiteljem pri delu z nadarjenimi: nekaj izhodišč in priporočil“. Zadnji namesto pojma celostne osebnosti uporablja pojem ‚celovite osebnosti‘, ki naj bi zajemala več dimenzij osebnosti – po njegovem tudi več vrst inteligentnosti. Bucik (2013, 14) pravi, da če želimo človeka spoznavati »celovito«, moramo imeti uvid v »raznorodnost psihičnih lastnosti, ne le v povprečne in pavšalne ocene njegove splošne inteligentnosti«.

Razbrati je, da se v izpostavljenih pedagoških besedilih celostni razvoj osebnosti nanaša na razvoj človeka na različnih področjih – v grobem pa na njegov motorični in duševni razvoj.

Temu na neki način podobno – v smislu razvoja več področij osebnosti kot različnih dimenzij osebnosti – pojmovanje celostnega razvoja osebnosti lahko zasledimo tudi v besedilih, ki jih znotraj uveljavljene pedagoške znanosti domačega prostora opredeljujemo s t. i. alternativnimi vzgojnimi koncepti, kot sta Montessori ali geštalt pedagogika (Gerjolj, Stanonik in Kastelec 2011; Hozjan, Udovč in Čigon 2023; Hozjan, Opeka in Glušič 2023; Medveš 1992; Nežič Glavica 2021b; Ošlaj in Pavliha 2014; Šinkovec 2017). Kot je videti, se zanje celostna osebnost nanaša na razvoj različnih dimenzij človekove osebnosti, s poudarkom tudi na duhovni, ki naj bi skupaj predstavljale celotno osebnost. Ne nazadnje se s tem pojmovanjem ujema oz. je z njo povezana težnja po priznavanju t. i. mnogoterih inteligenc osebnosti, ki jih je zasnoval Gardner (1993). Kot je znano, je teorijo mnogoterih ali tudi multiplih inteligenc oblikoval kot nekakšno kritiko prevladujočih akademskih (pri katerih se poudarja pomen jezika ter logike/matematike) in tradicionalnih konceptov inteligentnosti (inteligentnost lahko merimo). Za naše namene je pomembno, da avtor znotraj osmih inteligenc[3] navaja tudi t. i. znotrajosebno – morda duhovni inteligenci najbližjo –, opredeljeno kot sposobnost, s katero se lažje rešujejo problemi smisla in vrednot, obenem pa dejanja in življenje postavlja na širši in vrednostno ‚višji‘ nivo, kar naj bi naša dejanja in tudi pojave nasploh osmišljalo (Zohar in Marshall 2000).

2.2 Pozitivna vzgoja in izobraževanje

Pozitivna psihologija in Gardnerjeva teorija mnogotere inteligentnosti ter nekatere druge humanistične teorije in koncepti so se prenesli tudi na pedagoško področje, na katerem se je po letu 2009 začel uradno vpeljevati koncept ‚*positive education*‘ (Gradišek 2023), ki ga Musek Lešnik (2021) prevaja kot ‚pozitivna edukacija‘, čeprav bi ga lahko – po zgledu pozitivne psihologije – prevedli tudi kot pozitivna pedagogika. Polona Gradišek (2023) ga prevaja kot pozitivna vzgoja in izobraževanje (v nadaljevanju PVZ), kar uporabljamo tudi v tem besedilu. Kot piše Gradišek (2023), PVZ različni avtorji sicer definirajo različno, vendar po Seligmanu (Seligman et al. 2009), ki velja za utemeljitelja pozitivne psihologije, pomeni poučevanje (angl. *teaching*), pri katerem v šoli razvijamo tako tradicionalne spretnosti in znanja učencev, obenem pa spodbujamo in skrbimo za njihovo zadovoljstvo oz. dobro počutje (Sandholm et al. 2022; Seligman et al. 2009). Kot izpostavlja Gradišek (2023), naj bi si tako v okviru PVI sistematično prizadevali za razvoj dobrobiti oz. blagostanja učencev v šoli ter za vzpostavljanje njihovih tudi drugih pozitivnih stanj in lastnosti.

Kot ena izmed pedagoških smeri (oz. teorij) – kakor bi lahko pozitivno vzgojo in izobraževanje imenovali – se je PVI razvila na prehodu iz 20. v 21. stoletje, pri čemer se v okviru vzgoje in izobraževanja uporablja več zanjo predvidenih modelov. PERMA model velja za enega najširše uporabljenih in se naslanja na že omenjenega Martina Seligmana (2009), ki skupaj z drugimi zagovorniki pozitivne psihologije pravi, da naj bi ljudje stremeli k psihološkemu blagostanju, saj bolj kot ga uspemo

[3] Po Gardnerju (1993) ločimo jezikovno, glasbeno, logično-matematično, prostorsko, telesno-gibalno, medosebno, znotrajosebno in naravoslovno inteligenco.

vzpostavljati, uspešneje in učinkoviteje naj bi imeli možnost delovati (Musek in Avsec 2002; Musek 2007).

PERMA model naj bi zajemal pet ključnih »komponent«: prijetna oz. pozitivna čustva (P, angl. *pleasant emotions*), zavzetost (E, angl. *engagement*), pozitivne medosebne odnose (R, ang. *relations*), smisel življenja (M, angl. meaning) in dosežke (A, angl. *achievements*) (Gradišek 2023; Musek Lešnik 2021; Seligman et al. 2009). Kot poudarja sam utemeljitelj modela (Seligman v Musek Lešnik 2021), gre za med sabo enakovredne komponente, ki posamezniku omogočajo živeti srečno in osmišljeno življenje. V tem kontekstu lahko razumemo avtorjevo stališče, da bolj kot doživljamo prijetna čustva, bolj kot smo zavzeti, v boljših kot smo odnosih z drugimi in okoljem, večji smisel kot prepoznavamo in več kot imamo dosežkov, do katerih smo prišli, zadovoljnejši naj bi bili.

Gradišek (2023) opisuje primer dobre prakse v avstralski zasebni šoli Geelong, kjer so PERMA modelu dodali še šesto dimenzijo, zdravje (PERMAH; H kot angl. *health*). Kot omenja (2023), je bil cilj spodbujanje celostnega pristopa, ki so ga poimenovali »Nauči se, živi, poučuj in vgradi« (angl. »learn it, live it, teach it, embed it«). Razlaga, da naj bi učitelje najprej spodbujali k učenju (nauči se) in vpeljavi načel pozitivne psihologije v lastno življenje (živi), nato naj bi učence poučevali (poučuj) in zatem naučeno postopoma vgradili v njihovo vsakdanjo prakso (vgradi). Navaja, da je primer prakse vplival na razširitev PVI po Avstraliji in nato po svetu in da kaže, da je treba najprej spodbujati celostni razvoj učiteljev. Učitelji naj bi bili torej model, vzor ali zgled za učence – splošno je namreč znano, da učenci delovanje učiteljev bolj opazujejo in »manj poslušajo« o tem, kako naj se živi.

Povzamemo lahko, da je z izpostavljenimi komponentami PERMA modela povezano celostno (in ožje duhovno) razumevanje ter delovanje človeka v svetu. Zdi se sicer, da z nekaterimi komponentami bolj eksplicitno kot z drugimi, a dejstvo je, da si brez upanja in zaupanja lastno pozitivno usmerjenost, zmožnost odnosnega življenja z drugimi in zastavljanja ciljev ter (s tem povezano) doseganja uspehov težje – če sploh – predstavljamo. Ali drugače, vsega opisanega si ni mogoče predstavljati brez človekove vere oz. verovanja. Celo več: mogoče je trditi, da bolj kot verujemo, večja je verjetnost, da smo bolj (kot sicer) pozitivno usmerjeni; da smo v trdnejših medosebnih odnosih z drugimi; da si postavljamo zahtevnejše cilje in dosegamo višje rezultate.

Glede na vse navedeno je človekov duhovni ali – širše – celostni razvoj (kot vzpostavljanje in ohranjanje občutja skladnosti) videti za učitelja nepogrešljiv – še posebej danes.

V nadaljevanju predstavljamo rezultate ankete, kako učitelji zaznavajo podporo šole, na kateri so zaposleni, predvsem glede možnosti svojega celostnega in duhovnega razvoja ter pozitivne naravnanosti. Kljub predstavljenemu pojmovanju izpostavljenih pojmov smo v empiričnem delu izhajali iz ‚laičnih' pojmovanj – prisotnih tudi med učitelji – oz. iz njihovih asociacij, ki celostni razvoj povezujejo zlasti z mnogoterimi dimenzijami osebnosti, medtem ko duhovnega le s posameznimi, vezanimi predvsem na vero oz. religijo.

3. Empirični del

Za vpogled v nekatera stališča učiteljev, kako razumejo možnosti celostnega in duhovnega razvoja glede na institucijo, kjer so zaposleni (tj. osnovno šolo; v nadaljevanju OŠ), ter o s tem povezani PV predstavljamo nekatere ocene in mnenja vzorca anketiranih razrednih učiteljev.

3.1 Predpostavke

Postavili smo dve predpostavki:

- da se anketirani učitelji najbolj strinjajo s trditvijo, da njihova vzgojno-izobraževalna ustanova (OŠ) pozitivno naravnanost zaposlenih spodbuja;
- da se anketiranci strinjajo, da njihova OŠ namenja skrb celostnemu razvoju vsakega posameznika – veliko manj pa se strinjajo, da njihova OŠ skrbi tudi za duhovni razvoj vsakega posameznika.

3.2 Vzorec

Vzorec za besedilo prispevka vključuje le učitelje razrednega pouka – v glavnem učiteljice, saj je sodeloval le en učitelj in ena anketiranka, ki je sicer poučevala v 1. razredu, a ni bila razredna učiteljica. Anketiranci[4] so bili večinoma iz slovenskih javnih matičnih osnovnih šol, samo ena učiteljica iz podružnične OŠ. V vzorcu je bilo 81 anketirancev, ki so izpolnili vprašalnik, čeprav niso vsi odgovorili na vsa vprašanja oz. trditve.

Skoraj polovica (45,7 %) jih je bila v starostnem razponu od 30 do 39 let, 27,2 % od 25 do 29 let, 22,2 % od 40 do 49 let, le 4,9 % (4 anketiranci) pa je bilo mlajših od 25 let.

80 anketirancev je navedlo stopnjo izobrazbe. Več kot polovica ali 60,0 % jih je zaključilo univerzitetni študijski program, sprejet pred 11. junijem 2004, kar je ekvivalentno 2. bolonjski stopnji, 10 ali 12,5 % pa 2. stopnjo bolonjskega študija ali magistrski študijski program. Enako število in delež anketirancev je imelo zaključen visokošolski strokovni študijski program, kar se razume enako 1. bolonjski stopnji. 8 ali 10,0 % anketirancev je zaključilo univerzitetni študijski program prve stopnje, 1 ali 1,3 % visokošolski strokovni študijski program ter 3 ali 3,7 % magisterij znanosti.

Presenetljivo je bila večina anketirancev iz vaških OŠ: 38 ali 46,9 %, nato iz mestnih (29 ali 35,8 %) in iz primestnih OŠ (14 ali 17,3 %).

77 anketirancev je navedlo tudi regijo OŠ. Zastopane so bile vse regije, največ anketirancev pa je bilo iz Osrednjeslovenske statistične regije (16 ali 20,8 %) ter po 8 ali 10,4 % iz Goriške, Gorenjske in Savinjske regije.

Kljub temu, da so bile zastopane vse statistične regije ter anketiranci različne starosti in stopnje izobrazbe, je bil vzorec nerandomiziran ali nereprezentativni in priložnostni, saj so sodelovali le anketiranci, ki so si vzeli nekaj minut časa za iz-

[4] Za zaključeno zbirko raziskovalnih podatkov glej Cencič 2025.

polnitev vprašalnika. Poleg tega je zbiranje podatkov potekalo posredno – preko anketarjev, ki so bili študenti ene od pedagoških fakultet v Sloveniji, ko so spomladi leta 2022 opravljali študijsko pedagoško prakso. Vsak študent je bil naprošen, da v svoji ustanovi k izpolnitvi vprašalnika nagovori od enega do tri učitelje.

3.3 Vprašalnik

Oblikovali smo krajši vprašalnik, ki je bil kombinacija anketnih vprašanj odprtega in zaprtega tipa za demografske podatke (spol, starost, stopnja izobrazbe; okolje OŠ – mestna, primestna ali vaška –, vrsta – matična ali podružnična – ter regija ustanove), petstopenjske številčne ocenjevalne lestvice stališč Likertovega tipa z dvajsetimi stališči (trditvami) in odgovori od popolnega strinjanja (ocena 5), strinjanja (ocena 4), neodločenosti (ocena 3), nestrinjanja (ocena 2) do popolnega nestrinjanja (ocena 1) ter enega odprtega anketnega vprašanja za mnenja, komentarje ipd.

Da bi zagotovili vsebinsko veljavnost vprašalnika, smo trditve oblikovali na osnovi strokovne literature. Statistična analiza lestvice stališč je pokazala visoko stopnjo zanesljivosti, saj je bil Cronbachov koeficient alfa 0,890. Za šest stališč, vključenih v to besedilo, pa je bil Cronbachov koeficient alfa še malenkost višji, to je 0,899. Glede na ugotovitve (Šerbetar in Sedlar 2016), da se vrednost koeficienta alfa spreminja glede na število in sestavo postavk ter velikost vzorca in dolžino vprašalnika, nas je visoka zanesljivost vprašalnika za navedene trditve pozitivno presenetila. Objektivnost vprašalnika pa je omogočal večinoma zaprti tip vprašanj.

3.4 Obdelava podatkov

Podatke smo obdelali z opisno statistiko. Za nominalne spremenljivke smo izračunali število in odstotke. Pri ordinalnih spremenljivkah pa smo zanemarili dejstvo, da niso prave numerične spremenljivke in uporabili navedbo števila odgovorov (N), rezultat najnižjega odgovora (Min), najvišjega (Max), aritmetično sredino (M), standardni odklon (SD), koeficient asimetrije (AS) in koeficient sploščenosti (KS).

3.5 Rezultati in razprava

Kot omenjeno, smo iz vprašalnika izbrali šest trditev (v nadaljevanju oznaka za posamezno »t«) glede tega, kako anketiranci zaznavajo podporo OŠ, na kateri so zaposleni, pri svojem delu. Od teh trditev se dve nanašata na odnose, tj. na sodelovanje (t 12) in na učenje drug od drugega ali medsebojno oz. vzajemno učenje (t 14), dve na pozitivni »pogled« (na pozitivna dejanja (t 17) in pozitivna čustva (t 18)) in zadnji dve na razvoj posameznika, tj. na njegov celostni razvoj (t 19) in duhovni razvoj (t 20).

Rezultati opisne statistike o navedenih stališčih (tabela 1) kažejo, da se anketiranci z navedenimi trditvami – torej da šola podpira njihovo sodelovanje, učenje drug od drugega, pozitivna dejanja in čustva ter celostni razvoj – v povprečju strinjajo. Izjema je t 20 (duhovni razvoj), pri katerem prevladuje neodločenost. Najvišje je strinjanje s trditvijo (t 17), da ustanova podpira pozitivna dejanja (M =

Ključne besede trditev	N	Min	Max	M	SD	KA	KS
t 12: medsebojno sodelovanje	81	1	5	4,11	0,935	-1,072	1,323
t 14: učenje drug od drugega	80	1	5	4,20	0,920	-1,014	0,673
t 17: pozitivna dejanja	81	2	5	4,43	0,851	-1,345	0,821
t 18: pozitivna čustva	80	1	5	4,32	0,938	-1,455	1,699
t 19: celostni razvoj	80	1	5	4,10	0,908	-0,929	0,723
t 20: duhovni razvoj	81	1	5	3,54	1,141	-0,368	-0,782

Tabela 1: *Opisna statistika odgovorov na izbrana stališča.*

4,43), kjer je večina anketirancev označila strinjanje (ocena 4) in popolno strinjanje (ocena 5) – in samo pri tej trditvi nihče ni izrazil močnega nestrinjanja ali ocene 1 (glej graf 1 spodaj). Rezultati kažejo, da se anketirani v glavnem strinjajo, da se jih spodbuja k pozitivnim dejanjem, zato upamo, da tako tudi ravnajo. S t 17 je povezana tudi t 18, ki se nanaša na pomembnost pozitivnih čustev in ima visoko povprečje (M = 4,32), čeprav se en anketiranec, kar vidimo iz grafa, s trditvijo popolnoma ni strinjal (ocena 1). Predvidevamo, da je pozitivni pogled, ki ga v OŠ podpirajo, posledica še vedno prisotnih temeljnih univerzalnih vrednot, kot so spoštovanje drugega in okolja, medsebojno zaupanje, solidarnost idr., kar smo izpostavili uvodoma, ko smo navedli problematiko razpetosti sodobnega učitelja med različne sisteme vrednot. Lahko bi bil tudi posledica vpliva humanistične psihologije (zlasti Rogersove in teorije Maslowa), saj je ta vsebina za bodoče učitelje razrednega pouka ena od relevantnih študijskih tem. Najverjetneje pa rezultata ne moremo pripisati vplivu pozitivne psihologije, kaj šele PVI, saj – vsaj na dveh domačih pedagoških fakultetah – za nič od navedenega ne moremo trditi, da bi bilo v učnih načrtih študijskih predmetov študijskega programa razrednega pouka eksplicitno omenjeno. To potrjujejo tudi naši razgovori zadnjih nekaj let s kandidati pedagoško-andragoškega izobraževanja na seminarjih: da učitelji na šolah pozitivne psihologije, pozitivne vzgoje in izobraževanja ne poznajo; tudi Musek Lešnikova (2021) *Pozitivna psihologija za vrtce, šole in starše* je bila izdana ‚šele' leta 2021. Rezultat potrjuje našo predpostavko, da se anketiranci najbolj strinjajo s trditvama, da njihova vzgojno-izobraževalna ustanova spodbuja pozitivno naravnanost zaposlenih.

Anketiranci se tudi strinjajo, da OŠ posveča skrb medsebojnemu sodelovanju (M = 4,11) (t 12), kar nas v bistvu ne preseneča. Če se navežemo na zgoraj povedano glede uveljavljenih vrednot v naši kulturi – nekatere tradicionalne vrednote (kot je medsebojna pomoč) so videti še vedno navzoče, očitno tudi med razrednimi učitelji. Csikszentmihalyi (2019) poroča, da so raziskave večkrat dokazale, da je kakovost življenja najbolj odvisna od tega, kako doživljamo delo in svoje odnose z drugimi ter da najpodrobnejše informacije o tem, kdo smo kot posamezniki, pridobimo od ljudi, s katerimi komuniciramo, in iz načina, kako opravljamo svoje delo. Zato se po drugi strani glede na trditve Csikszentmihalyija sprašujemo, kako pojmujemo medsebojno sodelovanje in pomoč nasploh in kako to pojmujejo uči-

telji – predvsem zato, ker objavljeni rezultati mednarodnih raziskav, kot sta PISA 2018 in 2022 (Pedagoški inštitut. Mednarodne raziskave b. d.), znotraj naše prakse poučevanja kažejo na določene probleme. Glede na to, da slovenski 15-letni anketiranci v primerjavi s 15-letnimi anketiranci iz drugih držav, vključenih v izpostavljene raziskave, navdušenje pri učiteljih pri pouku zaznavajo težje ali podpovprečno (v učiteljih tudi težje prepoznavajo oporo in – kot pravijo – od učiteljev pri pouku prejemajo premalo povratnih informacij),[5] ostaja odprto vprašanje, koliko torej šola sodelovanje ali pomoč med učitelji v smeri kakovostnejšega dela in poučevanja zares podpira – pa tudi koliko podpore in možnosti sodelovanja za uresničevanje vsega tega je sama šola deležna od drugih z vzgojo in izobraževanjem temeljno povezanih institucij.

Visoko aritmetično sredino vidimo (tabela 1) tudi pri spodbujanju učenja drug od drugega (t 14) – nad oceno 4, ki označuje strinjanje s trditvijo (M = 4,20), a tudi tu imamo zgornjemu podoben pomislek.

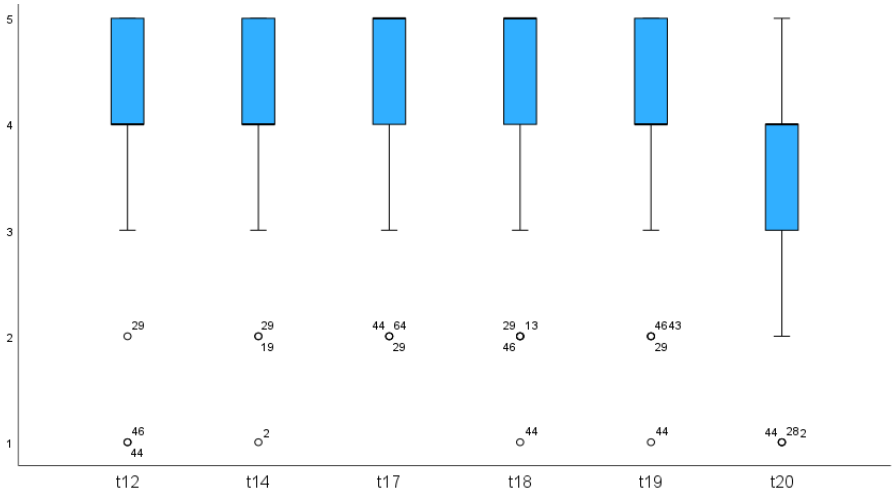
Najnižji povprečni vrednosti sta pri trditvah o spodbujanju razvoja. Trditev (t 19) se nanaša na celostni razvoj posameznika in je dosegla kar visoko aritmetično sredino (M = 4,10), čeprav v primerjavi z drugimi trditvami (razen s t 20) nižjo. K trditvi t 19 smo dobili komentar: »Menim, da je vsak posameznik sam odgovoren za svoj razvoj.«

Odgovor na trditev (t 20), da vzgojno-izobraževalna ustanova skrbi tudi za duhovni razvoj vsakega posameznika, pa kaže neodločenost anketirancev, saj je bil povprečni odgovor »se ne morem odločiti« (M = 3,54) – in razpršenost odgovorov največja (SD = 1,141) (preglednica 1). Dobili smo tudi podoben komentar iste anketiranke kot pri t 19: »Menim, da vsak posameznik sam skrbi za svoj duhovni razvoj, če tako želi oz. čuti.« Nad rezultatom in komentarjem, kot je podan, nismo presenečeni, saj je bilo po Musku (2006a) duhovno doživljanje znanstveno skoraj zanemarjeno, ker je duhovnost znanstveno težje raziskovati. Toda sam je pokazal, da je tudi to področje mogoče proučevati znanstveno oz. tudi empirično (Musek 2006b).

Če povzamemo – najvišje povprečje smo dobili pri trditvah (t 17, t 18, t 14 in t 12), ki se nanašajo na spodbujanje pozitivne naravnanosti in sodelovanje. Primerljivo najnižje pa pri skrbi vzgojno-izobraževalne ustanove za razvoj posameznika (celostni in duhovni razvoj).

Rezultate preglednice 1 ilustrira grafični prikaz kvartilov (angl. *boxplot*), iz katerega razberemo največje odstopanje rezultatov pri trditvi o skrbi za duhovni razvoj (t 20). Iz grafa in preglednice 1 razberemo (KA), da so se vsi odgovori anketirancev porazdeljevali negativno asimetrično ali asimetrično v levo, saj so prevladovale višje ocene ali strinjanje s trditvami. Najbolj izstopajo (graf) odgovori o skrbi za duhovni razvoj (t 20), kjer je iz grafa razvidno, da je porazdelitev odgovo-

[5] Rezultati so bili sicer osredotočeni na pouk maternega jezika in učitelje, ki ga poučujejo, a so, kar zadeva problem spodbujanja motivacije pri učencih, lastnega navdušenja nad vsebinami poučevanja ter nudenja opore in povratnih informacij mladim, rezultati PISA 2018 podobni rezultatom PISA 2022; pri tej je bil v središču pouk matematike in učitelji tega predmeta. Podobni pa so tudi rezultatom TIMSS 2023, v okviru katerega so bili v središču učitelji razrednega pouka (Pedagoški inštitut. Mednarodne raziskave b. d.).



Graf 1: *Grafični prikaz kvartilov mnenj o izbranih stališčih.*

rov najbolj podobna normalni porazdelitvi. Če so pri vseh ostalih odgovorih koeficienti sploščenosti (KS) pozitivni, je KS samo pri t 20 negativen in kaže na bolj sploščeno obliko porazdelitve odgovorov. Iz grafa tudi razberemo, da sta po dva anketiranca v odgovorih pri t 12 in t 20 označila oceno 1 (popolno nestrinjanje) ter po eden popolno nestrinjanje s trditvami t 14, t 18 ter t 19. Posamezniki (po eden ali dva) so izrazili nestrinjanje (ocena 2) pri vseh petih trditvah, razen pri t 20. Trditev t 20 o skrbi za duhovni razvoj je imela izhodišče v nestrinjanju s trditvijo (ocena 2). Rezultati grafa in preglednice 1 kažejo, da je duhovni razvoj ponekod še vedno tabu tema – da se o njem verjetno ne govori kot o pomembni dimenziji razvoja celostne osebnosti. Rezultati tako potrjujejo tudi drugo predpostavko, da se anketiranci strinjajo, da OŠ namenja skrb tudi celostnemu razvoju vsakega posameznika – veliko manj pa se strinjajo, da njihova vzgojno-izobraževalna ustanova skrbi tudi za duhovni razvoj vsakega posameznika. Rezultati nas glede na obvezne predmete našega osnovnega šolanja v primerjavi z obveznimi predmeti osnovnega šolanja v tujih državah (kot so ‚tradicionalne' – Avstrija, Nemčija, Španija in Italija – ali nekatere nordijske države, na primer Danska, Finska in Norveška) ne presenečajo. Z izjemo Slovenije imajo vse zgoraj naštete države kot obvezni predmet Religije/Etiko/Moralno vzgojo in izobraževanje (National Education Systems b. d.). Izhajamo iz prepričanja, da vsebine teh predmetov pomembno definirajo ne samo vrednotna izhodišča posamezne države, ampak tudi z njimi povezane temeljne vrednote družbe – torej tudi pomen duhovnosti.

4. Sklepne misli

Tema duhovnega razvoja učiteljev je v domačih strokovnih in znanstvenih pedagoških razpravah manj prisotna, čeprav je nepogrešljiva in povezana z duševnim

zdravjem pedagoških delavcev, kar je zanje kot sodobne ljudi pogosto ‚rak rana'. Po Poštuvan (2020) po eni strani število duševnih motenj narašča, po drugi pa se veča ozaveščenost o odgovorni skrbi zase. Ker je duhovnost vir notranje moči, je gojenje tega vira pomembno za vsakega od nas (Borysenko 2010) – zato bi bilo nujno odpreti tako razprave o poznavanju pomena teme kot tudi premisliti o možnosti izobraževanja učiteljev na to temo.

Glede na zapostavljeno tematiko duhovnosti učiteljev v okviru uveljavljenega sistema vzgoje in izobraževanja in duhovnosti kot take v javnosti nad dobljenimi rezultati nismo presenečeni; niti ne preseneča, da učitelji razlik med pojmoma celostnega in duhovnega razvoja ne poznajo dobro. Menimo, da pomen skrbi za duhovni razvoj učiteljev zato ni nič manjši, prej nasprotno. Duhovna dimenzija se zdi pomembna za razvoj tudi ostalih osebnostnih dimenzij – od socialne, motivacijske, usmerjene v pozitivno mišljenje in dejanja, zmožnosti zastavljanja visokih ciljev in (realnih) pričakovanj, do aktivacijske dimenzije – kar vse izgrajuje človekov občutek celote.

Ugotovili smo, da so nekateri rezultati zaenkrat težje – če sploh – razložljivi. Po mnenju anketiranih učiteljev institucija skrbi za možnost razvoja pozitivnih čustev in ravnanj, vendar slovenski 15-letniki (sodeč po nekaterih v tem prispevku navedenih mednarodnih raziskavah) poročajo o manjši podpori učiteljev in njihovem manjšem prispevku k čustvenemu blagostanju učencev. Mnenje o podpori pozitivnim čustvom in dejanjem pri anketiranih učiteljih se torej razhaja z zaznavanjem takih ali tem podobnih čustev pri mladih šolajočih se, vsaj glede na podatke mednarodnih raziskav. Ali gre pri tem za prevelika pričakovanja učencev od učiteljev, ostaja odprto vprašanje. Je pa z vidika PVI dejstvo, da pozitivno naravnani učitelji vplivajo na pozitivno naravnanost učencev. Temu torej naša raziskava ne pritrjuje. Odprto ostaja tudi, kako učenčeva čustva pri pouku zaznavajo učitelji.

Rezultati naše raziskave o tem, kako šola podpira oz. skrbi za medsebojno sodelovanje med učitelji in za učenje drug od drugega, odpirajo naslednje, z zgornjim povezano vprašanje. Če probleme glede poučevanja v šoli poznamo, jih želimo čim prej odpraviti. A sprašujemo se o odgovornosti zlasti vseh tistih institucij, ki bodoče učitelje izobražujejo in ki skrbijo za njihovo nadaljnje usposabljanje.

Pri trditvi, da njihova OŠ skrbi tudi za duhovni razvoj učiteljev, je povprečna ocena razrednih učiteljev srednje visoka in izraža neodločenost. Velika razpršenost v odgovorih kaže, da je skrb za duhovni razvoj verjetno odvisna od posamezne šole – in od posameznega učitelja.

Rezultati bi bili verjetno drugačni, če bi podatke zbirali na zasebnih OŠ, kjer domnevamo, da vodstvo poudarja pomen tudi duhovne dimenzije zaposlenih. Pri javnih šolah imamo občutek, da se duhovni razvoj še vedno enači z religioznostjo v ožjem pomenu in torej ne pozitivno – eksistencialno. Domnevamo, da se zlasti v sodobni javni šoli in življenju eksistencialna prvina humanosti izgublja.

V želji po prepoznavanju problemov in po nadaljnji razpravi smo z raziskavo želeli opredeliti nekatere kritične točke šole kot družbeno blagodejne institucije – z namenom spodbuditi tehten razmislek glede vzgoje in izobraževanja v prihodnosti.

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The Association of Emotion Regulation Problems in Adults with the Degree of Autonomy and Intimacy in Their Family of Origin

Povezanost težav v regulaciji čustev pri odraslih s stopnjo avtonomije in intimnosti v njihovi izvorni družini

Abstract: Family of origin factors have a major impact on individuals and the way they experience emotions and relationships in adulthood. In a study of 396 participants, who completed the "Family of Origin Scale" (FOS) and the "Difficulties in Emotion Regulation Scale" (DERS), we investigated the relationship between difficulties in emotion regulation in adulthood and the degree of autonomy and intimacy in the family of origin. The results show that higher levels of both traits in the family of origin were statistically significantly associated with better emotion regulation in adults. The results for each of the family of origin categories suggest, that clarity of expression, respect for others, and responsibility in the family of origin are the factors most strongly associated with better emotion regulation in participants. The study confirms the importance of promoting autonomy and intimacy in the family of origin for the emotional development of individuals and offers important starting points for therapeutic work with couples and families and for preventive activities in the field of pastoral work and mental health.

Keywords: Emotion regulation, autonomy, intimacy, family of origin, psychotherapy, pastoral work, mental health

Povzetek: Dejavniki izvorne družine posameznika ter njegov način čustvovanja in vstopanja v odrasle odnose pomembno zaznamujejo. Z raziskavo, v kateri je sodelovalo 396 udeležencev, ki so izpolnjevali „Vprašalnik izvorne družine" (*Family of Origin Scale – FOS*) in „Vprašalnik težav v čustveni regulaciji" (*Difficulties in Emotion Regulation Scale – DERS*), smo proučevali korelacijo med težavami v regulaciji čustev pri odraslih ter stopnjo avtonomije in intimnosti v njihovi izvorni družini. Ugotovitve kažejo, da je bila višja raven obeh lastnosti v izvorni družini statistično pomembno povezana z boljšo regulacijo čustev pozneje pri odraslih. Rezultati po posameznih kategorijah izvorne družine naka-

zujejo, da so jasnost izražanja čustev, spoštovanje in odgovornost v izvorni družini tisti dejavniki, ki so z boljšo regulacijo čustev pri udeležencih povezani najmočneje. Raziskava torej potrjuje pomen razvijanja avtonomije in intimnosti znotraj izvorne družine za čustveni razvoj posameznika, ponuja pa tudi pomembna izhodišča za terapevtsko delo s pari in družinami ter za preventivno delovanje na področju pastoralne dejavnosti in duševnega zdravja.

Ključne besede: čustvena regulacija, avtonomija, intimnost, izvorna družina, psihoterapija, pastoralna dejavnost, duševno zdravje

1. Introduction

The connection between an individual's emotional maturity and their early environment is not new. As early as 1965, in his studies on child development, D. W. Winnicott posed the question of whether an individual can reach emotional maturity in ways other than in the context of a family configuration (Winnicott 2002, 207). In an appropriate family environment, the child makes important experiences by being able to perceive himself in his relationships with individual family members or in the relationship of the family as a whole to him (Winnicott 2004, 118). Building on attachment theory, a number of studies have confirmed the link between secure attachment and the development of effective emotion regulation skills in young children (Waters et al. 2010, 37). From a family systems perspective, researchers have paid particular attention to co-regulation, the process by which parents or caregivers provide external regulation or support to the child to promote the development of emotion regulation in the early stages of life. Caregivers must perceive and respond to the emotional needs of family members, and children must observe, process and respond to multiple sources of influence on their emotional lives (Paley and Hajal 2022, 19). Appropriate emotional co-regulation within the system contributes to the development of emotional self-regulation, which is usually defined as the set of control processes by which we consciously and voluntarily influence what emotions we have, when we have them, and how we experience and express those emotions (Schore 2003, xiv).

Children therefore develop the ability to understand and express their emotions in a regulated way through their interactions with others, starting with their relationship with their parents (Buckhold et al. 2014, 329). There is a strong link between family of origin factors and the child's emotion regulation (Sheffield Morris et al. 2007, 379), and the ability to regulate emotions is crucial for healthy development and adequate functioning in many domains, while difficulties in emotion regulation are a risk factor for a range of negative developmental outcomes in childhood and adolescence (Paley and Hajal 2022, 19).

Attention to family processes promotes a more comprehensive and complete understanding of emotion regulation (Fosco and Grych 2012, 557). The family context influences the development of emotion regulation in three important ways:

first, through observation; second, through specific parental practises and behaviours related to the socialisation of emotions; and third, through the emotional climate of the family, which is reflected in the quality of attachment relationships, parenting styles, family expressiveness, and the emotional quality of the relationship between parents (Sheffield Morris et al. 2007, 362). In early childhood, important factors for the development of emotion regulation skills are recognising emotions, linking emotions to experiences and responding appropriately to one's own emotional experience (Shewark and Blandon 2015, 279–280). Research from 2012 (Fosco and Grych 2012, 572–273) found that each of these dimensions has a specific relationship to children's emotional functioning. The emotional context of the family also plays an important role in explaining how the challenges of growing up in the family are related to the development of emotion regulation in adolescence (Herd et al. 2020, 1545). Certain parental behaviours that support children's needs have a positive effect on the well-being and development of adolescents in most families. In particular, parental warmth and parental autonomy support fulfil their basic psychological needs and contribute to their well-being (Bülow et al. 2022, 1). A 2014 study (Buckhold et al. 2014, 329) found that difficulties in emotion regulation are passed down through generations, and one possible mechanism of transmission of difficulties is invalidation of the child's emotions by the identified parent. Parents who have limited emotion management skills may not know how to help their child or may be overwhelmed by the adolescent's emotional experiences. By invalidating the child's emotions, they deprive them of the opportunity to learn how to deal with them appropriately.

The presence of parental conflict also has an important impact on the child's emotion regulation and is associated with a lower proportion of warm, emotionally sensitive responses to the child's emotions in mothers and fathers, as well as greater disruption of the emotional climate in the family, leading to more hostility and tension and less positivity between family members. In contrast, emotional support from the mother but also family positivity and cohesion, are directly positively related to children's emotion regulation. Parental warmth and emotional support as well as the emotional climate thus serve as specific socialisation channels for children's emotion regulation (Fosco and Grych 2012, 573). The results of study from 2024 (Ogan et al. 2024, 28) also confirm the negative effect of conflicts in the family of origin on later relationship skills due to a higher degree of emotional deregulation.

When talking about autonomy and intimacy within the family, it is worth mentioning the theory of self-determination (Ryan and Deci 2018), which postulates three basic and universal needs in terms of psychological growth and well-being: the need for relatedness (feeling connected to others), the need for autonomy (feeling self-willed and authentic) and the need for competence (feeling capable and effective) (Grolnick 2003, 12). One of the most important tasks of growing up is the differentiation of the self, i.e. the ability to balance the natural forces of relatedness and autonomy in relation to the family of origin (Ross and Murdock 2014, 495).

Parenting that promotes the child's autonomy brings many benefits, not only in terms of meeting the child's psychological needs, but also in shaping the way siblings interact in a way that supports autonomy (Kaap-Deeder et al. 2015, 1). When speaking of behavioural control, it is important to keep in mind that only parenting characterised by pressure, interference and dominance can be considered controlling, while parenting characterised by guidance would better be considered structuring (Grolnick and Pomerantz 2009, 165). Building autonomy and relatedness within family interactions is a primary task of adolescence and critical to the psychosocial development of adolescents (Allen et al. 1994, 188). Autonomy is an important component of healthy, emotionally engaged relationships in adulthood. Individuals who have higher levels of autonomy are more open, less defensive and use healthier communication strategies in disagreements and conflicts with their partner (Anderson 2019, 9).

In addition to autonomy, intimacy within the family structure is a multi-layered concept that has a significant impact on emotional well-being, relationship satisfaction and overall family dynamics. Research shows that a high level of intimacy within the family creates a supportive environment that is crucial for the healthy development of the child. Higher levels of family intimacy may be a preventative factor for suicidality and self-harm in adolescents, suggesting that a good parent-child relationship is essential for a child's mental health (Gao et al. 2024, 1). Family of origin experiences have a significant impact on interpersonal competence, which is also reflected in adult relationships (Czyżowska et al. 2019, 8), allowing us to recognise the importance of intimacy in the family for healthy romantic relationships later in life. The effects of intimacy in the family of origin go beyond direct emotional support; they also impact broader social interactions. Research by Zhou et al. (2023, 1) confirms that family intimacy positively influences adolescents' relationships with peers via psychological capital and self-identity, indicating the indirect influence of family dynamics on social development and the importance of fostering intimacy in the family for children's social skill development and peer interactions. According to Erikson's theory of psychosocial development (1980, 90–91) intimacy is the result of a positive resolution of a crisis in early adulthood. A young person developing his or her own identity should have the capacity for genuine and reciprocal psychological intimacy with another person. Negative resolution of this crisis leads to isolation, which manifests itself in difficulties in close relationships and consequently impairs the further development of the individual. The research to be presented below contributes to further understanding and confirmation of the importance of the family of origin, and in particular the promotion of intimacy and autonomy within it. The focus is also on the development of skills for appropriate emotion regulation, which is an important developmental achievement for the individual and has far-reaching implications for their relationships both with themselves, with others and the world.

2. Method

2.1 Participants

The study[1] included 396 participants, 383 women and 13 men. The average age was 35.5 years (standard deviation 10.2) and the median was 34 years. The age of the participants ranged from 18 to 68 years. Most participants (174; 44%) were in the age group 31 to 45 years, 36% (142) were in the age group 18 to 30 years, 15% (59) were in the age group 46 to 60 years, 2% (6) were 61 years or older, and 15 (4%) did not specify their age. Most of the participants had an educational level equivalent to a pre-baccalaureate or a first Bologna degree (117, 29.5%), 27.5% (109) had a secondary school degree, 24.7% (98) had a pre-baccalaureate or a second Bologna degree, 10.6% (42) had a specialisation, a master's degree or a doctorate, 28 participants (7.1%) had a professional degree and 2 (0.5%) had a primary school education. In terms of employment structure, most participants were employed (271, 68.4%), 60 (15.2%) were students, 26 (6.6%) were unemployed, 25 (6.3%) were self-employed, 8 (2.3%) were retired and 3 (0.8%) were on maternity leave at the time of their participation in the study. 174 participants (43.9 %) were in an unmarried partnership, 136 (34.3 %) were married, 63 (15.9 %) were single, 17 (4.3 %) were divorced and 6 (1.5 %) were widowed. 224 participants (56.4 %) were Roman Catholic, 150 (37.8 %) did not belong to any religion, 10 (2.5 %) did not answer the question and the rest belonged to other religions.

2.2 Measuring Instruments

The participants answered the Family of Origin Scale, abbreviated FOS (Fischer and Corcoran 2007), and the Difficulties in Emotion Regulation Scale, abbreviated DERS (Gratz and Roemer 2004). The Family of Origin Scale is a 40-item instrument designed to measure the health of a person's family of origin (Fischer and Corcoran 2007). It is an important instrument in psychological research, particularly for understanding family dynamics and their impact on individual functioning. It was developed to measure the retrospective assessment of an individual's health and functioning in a family context and has undergone numerous validations and adaptations in different cultural contexts, emphasising its importance in both clinical and research settings. One of the pioneering validation studies of the questionnaire was conducted by Hovestadt et al. (1985), and their findings have been consolidated and extended by a number of subsequent studies and evaluations (Hemming et al. 2012; Kline and Newman 1994).

The questionnaire focuses on autonomy and intimacy as two key concepts that develop in the individual over the course of life in a healthy family. The questionnaire contains 20 questions on autonomy (AUT), which are divided into the following categories: Clarity of expression (CE), Responsibility (R), Respect for others (RO), Openness to others (O), Acceptance of separation and loss (A) and 20 questions on Intimacy within the family of origin (INT), organised into the following

[1] For a complete scientific database of research data see Kreš and Jerebic 2025.

categories: Encouraging the expression of a range of feelings (RF), Creating a warm atmosphere in the home, referred as mood and tone (MT), Dealing with conflict resolution without undue stress (C), Promoting sensitivity or empathy (E) and Developing trust in humans as basically good (T).

Traditional psychometric studies consistently found the FOS to be reliable. They also demonstrated evidence of discriminant validity and provided some support for construct validity (Hemming et al. 2012, 35). In the original FOS study, the authors reported two-week test–retest reliabilities of 0.97 for the overall scale, with a median of 0.77 for the 20 Autonomy items and 0.73 for the 20 Intimacy items. Internal consistency in the original study, measured by Cronbach's alpha, was 0.97 (Hovestad et al. 1985, 290). Our study also confirmed high internal consistency for the overall scale, with a Cronbach's alpha of 0.982. The subscales of Autonomy and Intimacy likewise showed high internal consistency, with Cronbach's alpha values of 0.963 (Autonomy) and 0.969 (Intimacy), respectively. All the Autonomy items also demonstrated high internal consistency, with Cronbach's alpha values as follows: Clarity of Expression 0.846, Responsibility 0.829, Respect for Others 0.896, Openness to Others 0.872 and Acceptance of Separation and Loss 0.883. The 20 questions on Intimacy organized into subdimensions, showed the following Cronbach's alpha values: Encouraging the Expression of a Range of Feelings 0.918, Creating a Warm Atmosphere in the Home (Mood and Tone) 0.879, Dealing with Conflict Resolution without Undue Stress 0.902, Promoting Sensitivity or Empathy 0.900, and Developing Trust in Humans as Basically Good 0.817.

The factor structure of the scale was not a central concern of this study, since the primary objective was not to validate the questionnaire but rather to explore the intricate relationships within family dynamics. Nonetheless, Hemming and colleagues (2012, 39–40) conducted a principal components analysis, which identified nine factors using the criterion of eigenvalues above one. Their findings also pointed to a dominant component of the FOS, which reflects the overall emotional atmosphere in the family and the quality of communication. Additional factors highlighted by the scale appeared to capture aspects such as conflict management and the degree of support for, as well as openness to, diverse perspectives, including those from outside the family system. Even though these factors did not correspond directly with the dimensions initially proposed by the developers of the instrument, the authors emphasized that they still offer meaningful insights into family functioning and may serve a useful role in clinical practice (Hemming 2012, 39–40).

When presenting the study and discussing its limitations, it is important to note that the Family of Origin Scale (FOS) is a retrospective self-report instrument. The scale measures the self-perceived functioning of the family during childhood and adolescence and does not provide an objective report on the actual family environment decades earlier (Hovestadt et al. 1985, 287). This methodology inevitably harbours the risk of retrospective recall errors (e.g. selective recall, underreporting of negative experiences) as well as socially desirable responding, both of which can systematically influence self-report data (Hovestadt et al. 1985, 294–

295; Hardt and Rutter 2004 266–268; Paulhus 1991, 17–29). Several international validation studies recognise these limitations and point out that the instrument captures perceptions rather than historical facts, and they recommend interpreting the results with caution (Niedermeier et al. 1994, 236; Petrogiannis 2010, 7).

The "Difficulties in Emotion Regulation Scale" (DERS) is a widely used instrument for measuring various aspects of difficulties in emotion regulation. In its original form, it was developed by Gratz and Roemer in 2004 for the in-depth measurement of difficulties in emotion regulation (Gratz and Roemer 2004). Their seminal work has been evaluated by a number of studies that have demonstrated the reliability and construct validity of the questionnaire (Bjureberg et al. 2004, 2015; Burton et al. 2022; Hallion et al. 2018; Neumann et al. 2010; Ritschel et al. 2015; Ganguly et al. 2024). The Difficulties in Emotion Regulation Scale was developed based on theoretical frameworks that explain emotion regulation as a process that includes awareness and understanding of emotions, acceptance of emotions, ability to engage in goal-directed behaviours, ability to control impulsive behaviours when experiencing negative emotions, and access to affective emotion regulation strategies (Gratz and Roemer 2004). The first category is Non--Acceptance of Emotional Responses (NONACC) and measures negative secondary emotional reactions to negative emotions or non-acceptance reactions to one's own distress. The Difficulties Engaging in Goal-directed behaviour (GOALS) category measures difficulty concentrating and completing tasks when the person is experiencing negative emotions. The Impulse Control Difficulties (IMPULSE) category measures the difficulty in controlling one's behaviour when experiencing negative emotions, and the Lack of Emotional Awareness (AWAR) category assesses the difficulty and/or unwillingness to feel and recognise emotions. The fifth category, Limited Access to Emotion Regulation Strategies (STRAT), refers to the belief that not much can be done to effectively regulate emotions when a person is upset, and the sixth category, Lack of Emotional Clarity (CLARITY), measures the extent to which individuals are clear and aware of what emotions they are experiencing.

In the initial study Cronbach's alpha was calculated to determine the internal consistency of the DERS items. Results indicate that the DERS had high internal consistency (0.93). All of the DERS subscales (computed from the 6 factors obtained in the factor analysis) also had adequate internal consistency, with Cronbach's alpha above 0.800 for each subscale. Chrombach's alphas for separate items of the DERS questionnaire in the initial study were 0.85 for Non-Acceptance of Emotional Responses, 0.89 for The Difficulties Engaging in Goal-directed behaviour, 0.86 for Impulse Control Difficulties, 0.80 for Lack of Emotional Awareness, 0.88 for Limited Access to Emotion Regulation Strategies and 0.84 for Lack of Emotional Clarity (Gratz and Roemer 2004, 47–50). Although several subsequent studies have also reported high Cronbach's alpha values, they consistently note weaker performance and lower reliability for the Awareness subscale, recommending either its exclusion or at least caution regarding its limitations (Moreira et al. 2022, 757; Sousa et al. 2023, 10; Kim et al. 2024, 10; Burton et al. 2022, 6). In our study,

Cronbach's alpha coefficients for the subscales were as follows: Non-Acceptance of Emotional Responses, 0.897, Difficulties Engaging in Goal-Directed Behaviour, 0.893, Impulse Control Difficulties, 0.894, Lack of Emotional Awareness, 0.779, Limited Access to Emotion Regulation Strategies, 0.900 Lack of Emotional Clarity, 0.890 and DERS total 0.960. These results indicate that, although the score for the Awareness items was somewhat lower, it was still sufficiently high to justify retaining all items in the present study.

2.3 Procedure

Participants were randomly selected for the study and participation was voluntary. Participants were invited to take part in the study via an advertised link on Facebook, which they accessed directly or shared via social media. The survey was conducted from September to December 2024 in Slovenian language and the results were statistically analysed using the Jamovi web tool (version 2.6.24.0).

3. Results

3.1 Descriptive statistics

An overview of the basic descriptive statistics for each category of the Family of Origin Scale is provided in Table 1 and Table 2.

	CE	R	RO	O	A	AUT
M	11,30	11,10	11,70	12.0	11,10	**57.3**
Me	11	11	11	12	11	**54**
SD	4,20	3,97	4,67	4,33	4,56	**19,70**
Mo	10*	9	8	12	4*	**50**
Min	4	4	4	4	4	**21**
Max	20	20	20	20	20	**100**

Notes: M - arithmetic mean, Me - median, SD - standard deviation, Mo - mode, Min - minimum, Max - maximum, * there is more than one mode, the first one is given, CE - clarity of expression, R - responsibility, RO - respect for others, O - openness to others, A - acceptance of separation and loss, AUT - autonomy.

Table 1: *Descriptive statistics for each category of the Family of Origin Scale - Part 1.*

	RF	MT	C	E	T	INT	FOS
M	12,30	13,10	10,80	11,50	12,90	**60,70**	**118,00**
Me	12	13	10	11	13	**60**	**114**
SD	4,91	4,54	4,49	4,58	4,00	**20,70**	**39,90**
Mo	8	13	8	8	12	**77**	**85**
Min	4	4	4	4	4	**20**	**44**
Max	20	20	20	20	20	**100**	**200**

Notes: M - arithmetic mean, Me - median, SD - standard deviation, Mo - mode, Min - minimum, Max - maximum, RF - encouraging the expression of a range of feelings, MT - mood and tone, C – dealing with conflict resolution without undue stress, E - encouraging sensitivity and empathy, T - developing trust in humans as basically good, INT - intimacy, FOS - total score on the Family of Origin Scale.

Table 2: *Descriptive statistics for each category of the Family of Origin Scale - Part 2.*

The results of the descriptive statistics for each category of the Difficulties in Emotion Regulation Scale are shown in Table 3.

	NONACC	GOALS	IMPULSE	AWAR	STRAT	CLARITY	DERS
M	15,50	14,60	14,60	14,90	19,20	11,80	**90,60**
Me	14	14	14	15	18	11	**87**
SD	6,38	5,12	5,89	4,54	7,67	4,57	**28,10**
Mo	12	10	13	14	13	10	**72**
Min	6	5	6	6	6	5	**37**
Max	30	25	30	29	40	25	**178**

Notes: M - arithmetic mean, Me - median, SD - standard deviation, Mo - mode, Min - minimum, Max - maximum, NONACC - non-acceptance of emotional responses, GOALS - difficulties engaging in goal-directed behaviour, IMPULSE - impulse control difficulties, AWAR- lack of emotional awareness, STRAT - limited access to emotion regulation strategies, CLARITY - lack of emotional clarity, DERS - total score on the Difficulties in Emotion Regulation Scale.

Table 3: *Descriptive statistics for each category of the Difficulties in Emotion Regulation e.*

3.2 The Correlation Between Family of Origin Factors and Emotion Regulation

In the second part of the study, we investigated whether there was a correlation between the individual categories of family of origin and the categories of emotion regulation in the participants. To do this, we first used the Shapiro-Wilk test to

		CE	R	RO	O	A	AUT	RF	MT	C	E	T	INT	FOS
NONACC	**Spearman's rho**	-0.414***	-0.406***	-0.394***	-0.359***	-0.344***	-0.420***	-0.369***	-0.376***	-0.392***	-0.383***	-0.376***	-0.412***	-0.422***
	p-value	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001
GOALS	**Spearman's rho**	-0.320***	-0.348***	-0.333***	-0.290***	-0.272***	-0.338***	-0.315***	-0.313***	-0.316***	-0.313***	-0.271***	-0.333***	-0.339***
	p-value	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001
IMPULSE	**Spearman's rho**	-0.300***	-0.318***	-0.289***	-0.271***	-0.234***	-0.304***	-0.264***	-0.302***	-0.316***	-0.286***	-0.256***	-0.309***	-0.309***
	p-value	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001
AWAR	**Spearman's rho**	-0.260***	-0.223***	-0.246***	-0.195***	-0.226***	-0.248***	-0.229***	-0.200***	-0.190***	-0.214***	-0.222***	-0.228***	-0.241***
	p-value	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001
STRAT	**Spearman's rho**	-0.404***	-0.387***	-0.403***	-0.354***	-0.327***	-0.407***	-0.375***	-0.393***	-0.397***	-0.388***	-0.393***	-0.422***	-0.420***
	p-value	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001
CLARITY	**Spearman's rho**	-0.420***	-0.352***	-0.396***	-0.325***	-0.341***	-0.399***	-0.393***	-0.370***	-0.336***	-0.382***	-0.360***	-0.401***	-0.406***
	p-value	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001
DERS	**Spearman's rho**	-0.433***	-0.421***	-0.424***	-0.370***	-0.359***	-0.436***	-0.398***	-0.406***	-0.406***	-0.409***	-0.387***	-0.436***	-0.441***
	p-value	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001	<.001

Notes: *** statistical significance at 0.01 level, Spearman's rho - Spearman's correlation coefficient, NONACC - non-acceptance of emotional responses, GOALS - difficulties engaging in goal-directed behaviour, IMPULSE - impulse control difficulties, AWAR - lack of emotional awareness, STRAT - limited access to emotion regulation strategies, CLARITY - lack of emotional clarity, DERS - total score on the Difficulties in Emotion Regulation Scale, CE - clarity of expression, R - responsibility, RO - respect for others, O - openness to others, A - acceptance of separation and loss, AUT – autonomy, RF - encouraging the expression of a range of feelings, MT - mood and tone, C – dealing with conflict resolution without undue stress, E - encouraging sensitivity and empathy, T - developing trust in humans as basically good, INT - intimacy, FOS - total score on the Family of Origin Scale.

Table 4: *Statistical significance of the correlations between the categories of the Family of Origin Scale and the categories of the Difficulties in Emotion Regulation Scale.*

check whether the distributions of the scores for the individual categories deviated statistically significantly from the normal distribution. As none of the variables were normally distributed, we calculated the correlations using Spearman's rho. The web-based programme Jamovi was used for the statistical processing of the data. The results of the correlations are shown in Table 4.

The results showed a statistically significant medium negative association between the total score on the family of origin questionnaire and the total score on the emotion regulation difficulties questionnaire (-0.441) at the 1% risk level, as well as medium and negative correlations between the family of origin autonomy category and emotion regulation difficulties, and between the family of origin intimacy category and emotion regulation difficulties combined (both -0.436) at the 1% risk level. The study found that at the 1% risk level, all correlations between the categories of the two scales were statistically significant. All results are shown in Table 4.

4. Discussion

The results show that there is a link between a number of factors of intimacy and autonomy within the family of origin and emotion regulation in adults, which is consistent with previous research findings (Bülow et al. 2022; Ganguly et al. 2024; Herd et al. 2020; Ogan et al. 2024). The study from Sheffield Morris et al. (2007, 380) confirmed that there is a strong link between family factors and emotion regulation in children and that the mechanism of this link operates primarily through the emotional climate within the family, parental behaviour in relation to children's emotions, and learning about emotions and emotion regulation through observation. In our study, creating a warm atmosphere at home was also associated with more successful emotion regulation in general as well as with all other subcategories, but especially with better access to emotion regulation strategies, acceptance of emotional reactions and greater emotional clarity in the participants. In our study, encouragement to express a range of feelings in the family of origin also emerged as an important factor that was moderately negatively correlated with emotion regulation in general, as well as with greater emotional clarity and better acceptance of emotional reactions. This means that greater encouragement to express a range of feelings in the family of origin was associated with fewer problems with emotion regulation in participants and all categories of emotion regulation. The intergenerational transmission of difficulties in emotion regulation was also investigated in a 2014 study (Buckhold et al. 2014, 330), which showed that parents who have difficulties in emotion regulation themselves invalidate their children's emotions, with the result that the children or later the adolescents also have difficulties in emotion regulation. Parental invalidation of emotions can contribute to a child's lack of adaptive strategies and emotion regulation skills, while also contributing to emotional and behavioural problems. Furthermore, experiences in the family of origin also have an important influence

on adult partner relationships (Levy et al. 1997). Most of the research mentioned above has focused on children or adolescents, but our research provides insight into the strength of these relationships in adults and shows that family of origin factors can follow a person into late adulthood.

With regard to autonomy in the family of origin, the study showed that greater promotion of autonomy in the family of origin was associated with fewer difficulties in emotion regulation and all categories of emotion regulation. The importance of promoting autonomy in the family was already highlighted in a 1994 longitudinal study (Allen et al. 1994, 179). Anderson (2019, 3) believes that the concept of autonomy needs to be given a more central role in couple therapy research and clinical practise. Our research has also confirmed these relationships and at the same time pointed to emotion regulation as an important determinant of these relationships.

Another interesting contribution of our study is the finding that the category of developing trust in humans as basically good in the family of origin is moderately negatively related to some categories of emotion regulation problems, meaning that the more an individual develops trust in people as basically good in the family of origin, the fewer problems he or she will have in emotion regulation later in life. Trust in the good in people is the subject of research in many disciplines, including psychology and neuroscience. Social trust is the belief that people are generally fair and trustworthy, and reflects an individual's positive attitude towards humanity (Flanagan and Stout 2010, 748). Balconi (2020, 69–70) considers trust to be a central component of all human relationships, and trusting behaviour is expressed as a basic need for people to connect with others and develop supportive relationships.

Another important lesson from our research concerns the question of how conflicts can be resolved without undue stress. Resolving conflict with less unnecessary family-of-origin stress has been shown to be moderately associated with better emotion regulation in general, better access to emotion regulation strategies, and greater acceptance of emotional reactions, which is consistent with the Ogan et al. study (2024) that confirmed that family of origin conflict is associated with higher emotional dysregulation in participants. When it comes to the inadequate resolution of family of origin conflicts, it is important to emphasise that difficulties in emotion regulation also play an important mediating role between family of origin violence and intimate partner violence, and that different forms of family of origin violence can affect emotion regulation differently in men and women. According to the results of Oliveros and Coleman's study (2021, 9428), sons' emotion regulation problems were most strongly influenced by the father's aggression towards the mother, meaning that sons considered this form of aggression to be the most threatening to their emotional security, while aggression directed towards the child, by both parents, appeared to be more threatening to daughters.

The results of our study have important implications for therapeutic work, especially for work with couples or parents of young children and adolescents.

Encouraging parents to work on their own emotion regulation and to develop greater intimacy and autonomy within the family system can be extremely important for the development of appropriate emotion regulation in children. The results of this study may also be useful in the design of parenting programmes to teach emotion regulation skills and in parenting schools, whose programmes should also focus on promoting autonomy and intimacy within the family and help parents understand the impact of their own behaviour on their children's emotional development. Teaching parents appropriate emotion regulation skills is crucial for their children's emotion regulation and mental health, as impaired emotion regulation skills have been identified as a transdiagnostic risk factor for a range of mental disorders (Aldao 2016, 257), and consequently, emotion regulation skills have been identified as a highly important developmental task to be fostered in child rearing. According to Ogan (2024, 40), when working with individuals or couples, it is important to reduce their emotional reactivity and identify behaviours that are consistent with their goals, which has the potential to promote behaviours that will help them maintain romantic relationships. These behaviours can reduce their experiences of ongoing relationship problems, negative conflict, and instability that reinforce cycles of deregulation across generations. Indeed, the difficulties parents have with emotion regulation can be passed on to adolescents through the invalidation of emotions. Inadequate skills and low self-efficacy in coping with negative emotions can contribute to persistent feelings of sadness and consequently depression, anxiety and a tendency to withdraw into themselves. In addition, teens may not seek support from their parents if their feelings have been invalidated in the past. Another way adolescents react inappropriately is impulsivity, which can contribute to aggressive behaviour and noncompliance with rules (Buckhold et al. 2014, 329–330). For parents the period of their child's early adulthood can be particularly challenging, as they must adapt their parenting behaviour to the fact that their older children are still living at home but are socially considered as adults. With the increasingly common phenomenon of children staying at home until almost the age of 30, parents have few role models in this changing role and are often in doubt as to how they should behave (García-Mendoza et al. 2020, 385).

By working to improve intimacy and autonomy within the family, we indirectly influence a more appropriate way of regulating the emotions of all family members, which can have far-reaching consequences. The results of our research can therefore also have a wider reach in the field of mental health. Indeed, difficulties with emotion regulation, as measured by the Difficulties in Emotion Regulation Scale, are considered a transdiagnostic risk factor for many forms of psychopathology (Skutch et al. 2019, 485). The questionnaire has shown correlations with borderline personality disorder, post-traumatic stress disorder, anxiety disorders, substance abuse disorders, depression and eating disorders (Sörman et al. 2022, 213), with greater difficulties in emotion regulation more likely to lead to alcohol as a coping mechanism (Simonič et al. 2024, 1). This highlights the importance of

a healthy family environment where open communication and expression of emotions are encouraged, which may reduce the risk of developing unhealthy forms of coping with stress. The results may also be useful for pastoral practice. Pastoral workers working with families can use the intervention of deepening the emotional experience to provide a sense of safety for family members to explore certain emotions in an empathic relationship and find more soothing ways to respond emotionally (Ganc and Jerebic 2024, 184). The results can provide a holistic approach to supporting believers that takes into account both their family experiences and their ability to deal with emotions, which can lead to better spiritual and personal growth.

The main limitation of our study concerns the participants, as the sample was predominantly female (97%). In future studies, it would be useful to include an approximately equal number of men and women, which would also allow us to observe possible differences in family factors related to emotion regulation problems between women and men. It is also difficult to talk about causal relationships as this is a correlational study. Future research should address this limitation by investigating potential causal relationships more directly. Despite some limitations, the study provides important insights into family factors and their relationship to emotion regulation in adulthood.

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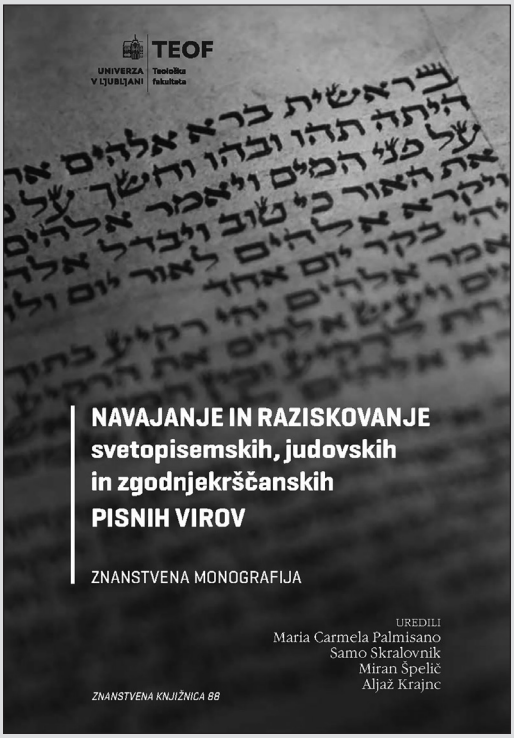

Maria Carmela Palmisano, Samo Skralovnik, Miran Špelič in Aljaž Krajnc (ur.)

Navajanje in raziskovanje svetopisemskih, judovskih in zgodnjekrščanskih pisnih virov

»Monografija prinaša resnično obsežno in temeljito raziskavo, ki pomeni novo raven v predstavitvi teh virov in njihovih zakonitosti slovenskim bralcem ter bo generacijam prihodnjih študentov močno olajšala prve korake pri delu z njimi. Zasnovana je na interdisciplinarnem pristopu, skupina avtorjev, ki se ponaša s širokim strokovnim zaledjem, ponuja izčrpen pregled različnih teorij in vidikov, hkrati pa z jasnim slogom pisanja omogoča razumevanje tudi začetnikom.«

doc. dr. David Movrin, recenzent monografije

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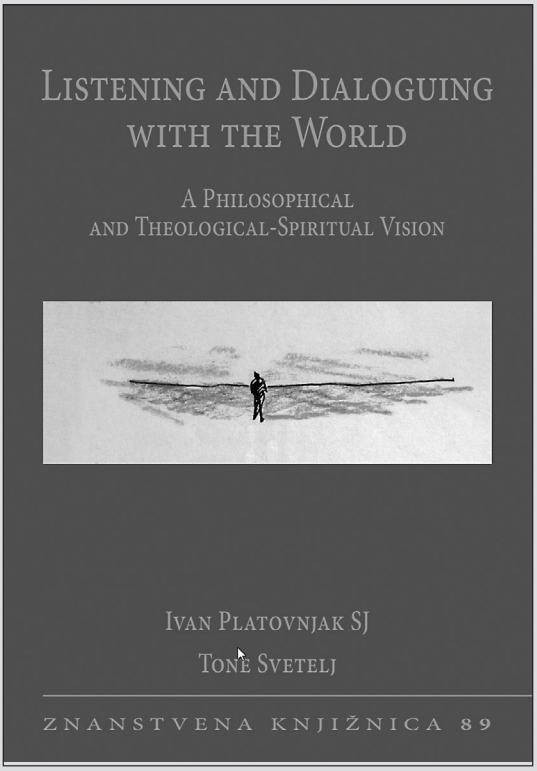

Ivan Platovnjak in Tone Svetelj

LISTENING AND DIALOGUING WITH THE WORLD: A PHILOSOPHICAL AND THEOLOGICAL-SPIRITUAL VISION

»Ta knjiga ponuja svež pristop k teologiji, ki jo vidi kot racionalno disciplino, sposobno brati pomen sveta in ki je nujna za dosego izpolnjenosti. Erudicija avtorjev daje bralcu občutek, da hodi skozi moderne čase ob spremstvu dveh odličnih vodičev. Razlagata zapleteno resničnost, vendar ne mislita namesto bralca.«

prof. dr. Piotr Roszak, recenzent zbornika

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MAGNA CHARTA
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