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LANGUAGE – CULTURE – POLITICS: International Journal

The aim and the thematic scope:

Language – Culture – Politics: International Journal is a scientific periodical issued by the Editorial Board of The Institute of Modern Philology composed of three departments: English and American Studies, Slavic Studies, and International Relations. Due to the range of disciplines represented by the members of the Editorial Board, the periodical is open to publications covering such spheres as language and literature, education, culture, social studies, religious studies, philosophy, political science and international relations, and therefore, the area of humanities in its broadest scope and content of the term.

The periodical is composed of three main parts, signaled by its title: LANGUAGE – CULTURE – POLITICS. Besides, one additional part – CRITICAL REVIEWS can always be added whenever thematically related materials are sent.

The journal is a publication registered in the National Library of Poland (ISSN: 2450-3576). The authors' articles are qualified to publication after they are positively reviewed. The names of independent reviewers are given in the opening section of the journal.

Cel i zasięg tematyczny:

Language – Culture – Politics: International Journal jest czasopismem naukowym wydawanym przez Zespół Redakcyjny Instytutu Neofilologii, składającego się z trzech katedr: Filologii Angielskiej, Filologii Słowiańskiej i Stosunków Międzynarodowych. Zakres reprezentowanych przez Zespół Redakcyjny dyscyplin naukowych sprawia, iż czasopismo jest otwarte na publikacje obejmujące swym zasięgiem takie obszary jak język i literatura, edukacja, kultura, nauki społeczne, religioznawstwo, filozofia, nauki o polityce i stosunki międzynarodowe, a zatem cały obszar humanistyki w najszerszym tego słowa znaczeniu.

Czasopismo składa się z trzech głównych działów zasygnalizowanych w tytule: JĘZYK – KULTURA – POLITYKA. Ponadto, dodatkowy dział – RECENZJE może być dodany w sytuacji kiedy nadesłane zostaną materiały adekwatne pod względem tematycznym.

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Język – Language



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Some Facts on Homonymy in Polish

Homonymy w języku polskim: wybrane aspekty

Abstract

This paper focuses on the investigation into homonymy in Polish, taking into account the existing definitions of this phenomenon. It presents the origin of the word HOMONYMY together with its types with numerous examples. Some of the definitions have been exemplified via lexemes taken from other languages in order to clarify the notion of interlingual homonymy.

Key words: *homonymy, polysemy, entry, lexeme, interlingual.*

Abstrakt

Praca ta skupia swoją uwagę na analizie procesu homonimii w języku polskim, podając funkcjonujące definicje tego zjawiska. Prezentuje ona również pochodzenie słowa “homonimia” i przedstawia różne rodzaje homonimii. Niektóre z definicji opatrzone są przykładami z innych języków w celu głębszego zaprezentowania homonimii międzyjęzykowej.

Słowa kluczowe: *homonimia, polisemia, hasło, lexem, międzyjęzykowy.*

Introduction

Semantics is the branch of linguistics which mainly concentrates on the meaning of words, phrases and sentences. It is frequently described as the study of meaning communicated through language. (Saeed, 2009, p. 3)

To understand a sentence we must know much more than the analysis of this sentence on each linguistic level. We must also know the reference and meaning of the morphemes and words of which it is composed, naturally, grammar cannot be expected to be of much help here. These notions form the subject matter for semantics. (Chomsky, 2009, p. 112)

Cruse states that semantics has many areas among which are the following:

1. Grammatical semantics which studies aspects of meaning closely related to syntax.
2. Logical semantics which studies the relations between natural language and formal logical systems such as the propositional and predicate calculi.
3. Linguistic pragmatics which can be simply defined as the branch of linguistics that studies the way the context influences meaning.
4. Lexical semantics which studies the meaning of content words. (Cruse, 2000, p. 110)

The focus of this work is to analyse the phenomenon strictly connected with the word meaning or meanings, namely homonymy. Homonymy is often contrasted with the phenomenon of polysemy, which is associated with the word meaning as well.

The Stoics noticed that “a single concept can be expressed by several different words (synonymy) and that, conversely, one word can carry different meanings (polysemy)”. (Ravin and Leacock, 2000, p. 1) However, it was in 1897 when the term first appeared in Michael Breal’s *Essai de Semantique* (1897). In 1900 it was translated into English *Semantics: Studies in the Science of Meaning* where a newly coined term appeared.

The new meaning of the word, whatever it may be, does not make an end of the old. They exist alongside of one another. The same term can be employed alternately in the strict or in the metaphorical sense, in the restricted or in the expanded

sense, in the abstract or in the concrete sense. In proportion as a new signification is given to a word, it appears to multiply and produce fresh examples, similar in form, but different in value. We shall call this phenomenon of multiplication Polysemia. (Breal, 1900, p. 139)

Although most of the psycholinguistic research has been focused on the comprehension of homonymy rather than polysemy (Klepousniotou, 2008, p. 1534), many linguists claim that most frequent words in English texts are polysemous. Falkum and Vincente explain this little attention towards polysemy as “the predominance of generative grammar with its focus on the sentence as the central unit of meaning. However, with the emergence of the cognitive grammar during the 1980’s polysemy emerged on the research agenda as a key topic in lexical semantics”. (Falkum and Vincente, 2015, p. 5)

Homonymy vs Polysemy

Both homonymy and polysemy are strictly connected with lexical ambiguity, since they both deal with multiple meanings of the word. The difference between homonymy and polysemy is as follows: the focus of the former is a word having several meanings which are unrelated while the focus of the latter is a word having several meanings which are related. In other words, “whereas homonymy (whether absolute or partial) is a relation that holds between two or more distinct lexemes, polysemy (multiple meaning) is a property of single lexemes”. (Lyons, 1995, p. 58)

M. L. Murphy and A. Koskela expand the definition of the two linguistic issues in the following way:

Homonymy and polysemy both involve one lexical form that is associated with multiple senses and as such both are possible sources of lexical ambiguity. But while homonyms are distinct lexemes that happen to share the same form, in polysemy a single lexeme is associated with multiple senses. The distinction between homonymy and polysemy is usually made on the basis of the relatedness of the senses: polysemy involves related senses, whereas the senses associated with homonymous lexemes are not related. (Murphy&Koskela, 2010, p. 79)

Basically, in homonymy most words share the same orthography and phonology, but are unrelated in meaning. An example could be the word

bank which means (i) 'financial institution' and (ii) 'land at river's edge'. Dictionaries have two different lexical entries for this word. In polysemy, on the other hand, words share not only the same orthography and phonology, but are also semantically connected. The word *book* is an example comprising several meanings: (i) 'a written text that can be published in printed or electronic form', (ii) 'a set of pages that have been fastened together inside a cover to be read', (iii) 'one of the parts that a very long book, such as *The Bible*, is divided into' (*The Book of Job*) (Cambridge Online Dictionary).

Additionally, to classify a word as homonymous or polysemous lexicographers take into account the etymology of a word. Words of distinct origin are claimed to be homonymous, whereas those from the same source are polysemous. However, this criteria is not always relevant, since there are instances of separate entries of two lexemes having a common origin. The form *pupil* has two different senses (i) 'part of the eye', and (ii) 'school child', and historically they have a common origin, but now they are semantically unrelated. Similarly, all dictionaries treat *flower* and *flour* as homonyms with separate listing, although originally they were the same word "the distinction between homonymy and polysemy is not an easy one to make. Two lexemes are either identical in form or not, but relatedness of meaning is not a matter of yes or no; it is a matter of more or less". (Kreidler, 1998, p. 52)

Many authors have claimed that lexical ambiguity should be represented as a continuum rather than a dichotomy:

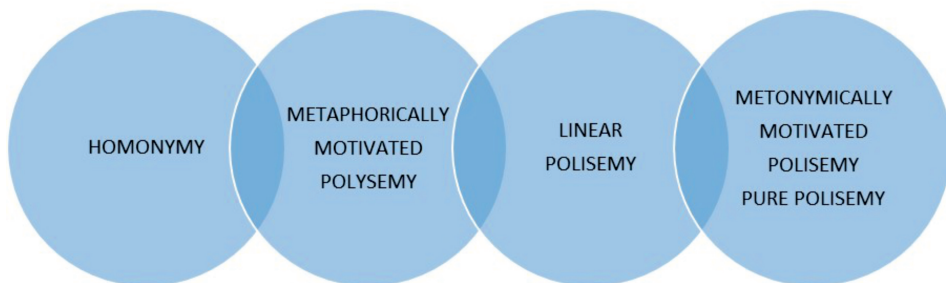
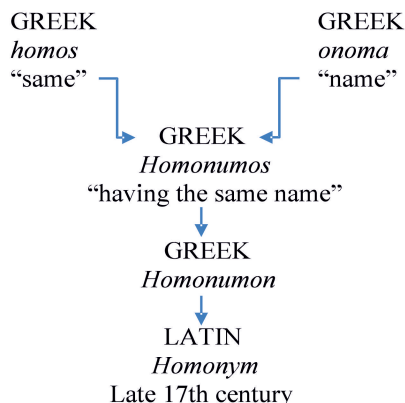


Figure 1: Lexical ambiguity (Lyons, 1977, p. 550)

Homonymy

The origin of the word:



Elżbieta Awramiuk defines homonymy in the following way:

Homonymy, in general terms, consists in expressing different meanings via the usage of the identical language form. The notions of 'form' and 'meaning' are connected with the theory of the language sign. The communication between people is strictly connected with the usage of different forms, both spoken and written. These forms constitute unilateral groups and only by the semantic interpretation (bilaterality) can we distinguish if we deal with one language entity or more. [...] Homonymy exists when two or more bilateral entities have the same form. (Awramiuk, 2011, p. 29)

On the other hand, Tomasz Krzeszowski (Krzeszowski, 2016, p. 106) distinguishes between true homonymy and partial homonymy. The former consists in unrelated meanings, orthographically identical forms and grammatical equivalents; the latter should fulfil the condition of at least one form identity, for example, *found* as the past simple of *to find* and *found* as the basic form of the verb *to found* meaning 'to establish'.

Homonymy as a linguistic phenomenon is the issue of interest for linguists and poses theoretical and practical problems. Linguists, across language boundaries, cannot provide the systematic classification of homonymy common for all languages. Theoretical problems are connected with divergent classification systems among languages, not coherent methods of analysis

and a broadly developed system of the description of homonymy (inflectional homonymy, lexical homonymy, syntactic homonymy, phraseological homonymy, homophony, homography, textual homonymy, interlingual homonymy, heterography, heteronymy). Practical problems arise when dictionaries are compiled by lexicographers since they are forced to adopt concrete practical solutions to organize words into entries. For example, in Polish the word *wieść* is both a verb and a noun having two separate entries in dictionaries (*wiedzie spór* – verb, *o dziwnych wieściach* – noun). Language users become aware of the existence of homonymy at school when confronted with reading and writing together with communicational misunderstandings while writing/reading and speaking/listening. Homonymy becomes the source of orthographical problems in distinction between proper names from common names (*Szwedka/szwedka*, *Prusak/prusak*). (Awramiuk, 2011, p. 32)

According to K. Wojan:

Homonymy represents language universals. The existence of homonymy in natural languages is of upper importance and at the same time the rule, based on the nature of language. [...] It is not a phenomenon that homonyms come into existence in the system of any language [...] but longlasting homonymy acceptance in any language is astonishing since the nature of the language is to delete any forms interfering with the fluency and homogeneity, and consequently, it stands in opposition to the fundamental language function, namely, communication. (Wojan, 2004, p. 73)

Additionally, Małgorzata Majewska (Majewska, 2002, p. 24) claims that homonyms are entities which differ in the idea of the content along with the idea of the expression. What is more, it is vital to remember that the written form constitutes the conventional system, whereas the phonemic realisation of a given entity depends on its phonetic position.

Pokaż mi gdzie jest Bródno.

Pokaż mi gdzie jest brudno.

J. Lyons (1977) underlines the potential of dual formal identity of words – phonemic substance identity and graphic substance identity and says that two words entities are formally identical in their phonemic substance on condition that they have the same phonological representation, whereas in graphic substance on condition that they have the same orthographic representation.

The division of homonymy in Polish

According to K. Wojan, homonymy in the Polish language comprises the following categories: morphological homonymy, lexical homonymy, phraseological homonymy, syntactic homonymy and phonemic homonymy. (Wojan, 2004, p. 74)

Morphological homonymy occurs when two or more lexical entries are identical in graphic representation, but manifest two or more different parts of speech. (Kaleta, 2011, p. 17)

- The word *piła* in Polish is both a verb and a noun (the former meaning past tense of the verb 'to drink' in the 3rd person singular, the latter meaning 'a device for sawing')
- The word *chory* in Polish is both a noun and an adjective (the former meaning 'a sick person, the latter describing 'the state of being ill')
- The word *koło* in Polish is both a noun and a preposition (the former meaning 'a circle', the latter describing 'the position of an object in relation to another object')
- The word *przepaść* in Polish is both a noun and a verb (the former meaning 'abyss', the latter 'to vanish')

Lexical homonymy occurs when two or more lexical entries represent the same part of speech. Małgorzata Majewska provides the simplest definition of lexical homonymy and states that lexical homonyms are words having the same pronunciation but different meaning. (Majwska, 2006, p. 17)

- The word *zamek* in Polish is a noun in all its entries meaning 'a device used for closing the door' and 'a castle'
- The word *kosztować* in Polish is a verb in all its entries meaning 'to try the taste of' and 'to cost'

Phraseological homonymy occurs when a phrase may acquire more than one interpretation depending on the classification of nouns forming it (proper names or common names).

- The phrase *Zielona Góra* is a proper name which is the name of a town in Poland, but *zielona góra* as a common noun meaning 'a hill covered with grass and trees'
- In the phrase *Wycieczki do Łazienek*, *Łazienki* is a proper name referring to an attractive place for tourists in Warsaw, but *łazienki* is a common noun meaning 'bathrooms'
- The phrase *No to Bach!* is a title of the article in a Polish magazine 'Polityka' devoted to the Bach Festival in Świdnica (*Bach* referring to the surname of a famous composer), however, *No to bach!* is

an onomatopoeic phrase mostly used with an exclamation mark often summerising great expectations which end up in a sort of misfortune

- In the phrase *dżem z Biedronki*, 'Biedronka' is a proper name referring to the name of a chain store, whereas 'biedronka' is a name of an insect (ladybird)

Syntactic homonymy is when the differences and ambiguity in meaning arise on the sentence level. The interpretation of such sentences is narrowed when analysed in context.

- *Podaj parasol Oli!* (one interpretation is 'Give the umbrella to Ola' and the other 'Give Ola's umbrella')
- *Zabójstwo znanego aktora wstrząsnęło opinią publiczną.* (one interpretation is 'a famous actor killed someone' and the other 'a famous actor was killed by someone')
- *Nie dawała mu spokoju zdrada żony.* (one interpretation is that 'he couldn't accept his wife cheating on him' and the other is that 'he couldn't accept his cheating on his wife')
- *Tu jest brudno!/ Bródno!* (the former referring to the district of Warsaw, the latter describing the state of place being dirty)

Phonemic homonymy is the state of phonetic identity of two or more lexical entries which differ in orthography, etymology and meaning. Phonemic homonymy is called homophony and according to Małgorzata Majewska (Majewska, 2006, p. 23), the phenomenon of homophony is superior to homonymy since it comprises all entries identical in terms of pronunciation:

- *Może/morze/może/* - maybe/sea
- *Bóg/Bug/buk/* - God/river's name
- *Miau/miał/m'au/* - purr/he had
- *Krzyk/kszyk/kşik/* - cry/common snipe

Additionally, Elżbieta Awramiuk (Awramiuk, 2011, p. 30) presents the homonymy of complex forms which consists in a bilateral sequence of sounds leading to various orthographic segmentations of a text, consequently, manifesting various meanings:

- */manastrɔjɛ/* - the interpretation depends on the speaker's message intention and the context
 - Ma nas troje.* - There are three of us in the family.
 - Ma nastroje.* - She is moody.
 - Ma na stroje.* - She has money to buy clothes.
- */marica/*
 - Marysia.* - the name of the woman.

Ma rysia. – She has a lynx.

Ma Rysia. – Her partner's name is Rysio.

– /nauk^jipɔp^jis/

Nauki po PIS. – teachings following the PIS's reign.

Nauki PO PIS. – teachings of two political parties.

Nauki popis. – display of the excellent knowledge.

Radosław Kaleta discusses the concept of homography, where two or more entries are identical in spelling, but different in pronunciation, meaning and etymology. (Kaleta, 2011, p. 21)

– *zamarzać*

1. /zamarzać/ – to get frozen

2. /zamażać/ – to dream of

– *cis*

1. /ćis/ – a plant

2. /c-is/ – musical term

– *rozmarzać*

1. /rozmarzać/ – to melt

2. /rozmażać/ – to encourage to dream

Interlingual homonymy

Interlingual homonymy appears across languages when two or more lexes constitute homonymous pairs in two or more languages. E. Awramiuk in her work *Impressive Function of Homonymy* presents a few examples of this phenomenon in Polish and English titles of articles in a Polish magazine 'Polityka'. (Awramiuk, 2011, p. 35)

– *Murem za Moorem* (P2004/32:89) – the title shows the phonetic similarity of the surname of the American director with a Polish word meaning *wall*. What is more, the title is based on a Polish idiom 'stać za kimś murem' (strongly support somebody's decisions) which enhances the impressive effect.

– *Od grata – non grata* (P2004/32:82) – the title can be associated with the time when Poland entered the EU and many people started to bring old cars on which the Treasury imposed excise tax. The form of a Polish word *grat* (meaning 'an old car') used in the title is identical with the word used in a Latin phrase *persona non grata* which means 'someone who is not welcome'.

– *Bushujący w kukurydzy* (P2006/8:74) – in this title *bushujący* which refers to the word *busz* is homonymous with the surname of the Ameri-

can president Bush. This example shows homonymy on the morpheme level.

- *Kieliszek cavy* (P2007/29:82) – this example presents phonemic homonymy of the words *kawa* and *cava*, the former is coffee, and the latter sparkling wine.

Linguists attach to interlingual homonymy the following division:

- Internal interlingual homonymy
- External interlingual homonymy
- Semantic interlingual homonymy

The definition of internal interlingual homonymy states that two lexemes should be identical in phonetic and graphic representations in at least two languages. What is more, these lexemes must constitute homonyms within their internal language systems. (Wojan, 2010, p. 270)

In Polish:

aura I

- the weather condition;
- the atmosphere of a place;
- the relations among people;

aura II

- illness symptoms;
- a part of astral body;

In Finnish:

aura I

- plough;

aura II

- the Aurojoki river;

aura III

- weather;
- the atmosphere of a place;

aura IV

- illness symptoms;
- a part of astral body;

In Russian:

аура I

- the atmosphere of a place;

аура II

- illness symptoms;
- a part of astral body;

In English:

aura I

– the state of mind, mood;

aura II

– the atmosphere of a place;

aura III

– the movement of air in an electrified point;

aura IV

– illness symptoms.

External interlingual homonymy is based on the existence of two or more identical lexemes in terms of phonetic and graphic representations, in at least two languages. However, these lexemes do not represent homonymy within their internal language system. Consequently, this phenomenon is often described as 'false friends'.

English word:

adapter – extension block

angina – angina pectoris

lunatic – crazy

magazine – journal

smoking – the act of smoking cigarettes

Polish word:

adapter – record player

angina – tonsillitis

lunatyk – somnambulist

magazyn – warehouse

smoking – suit

Semantic interlingual homonymy occurs when two or more lexemes are homonymous within their internal language systems but phonetic and graphic representations vary across languages. Additionally, they represent equivalent fields. (Wojan, 2007)

In Polish:

kaczka I

– a type of homebird;

– used in a phraseological phrase;

– play ducks and drakes;

kaczka II

– rumour, hoax;

kaczka III

– the container in hospital used for pissing;

– a line holder on a yacht;

– a duck plane;

In Finnish:

ankka I

– a type of bird;

– a male duck;

ankka II

- spread rumours

In Russian:

утка I

- a type of bird;
- a container for pissing;

утка II

- hoax;
- spread rumours;

утка III

- a duck plane.

The phenomenon of homonymy seems to be very regular, however, in Polish homophones appear more often than homographs. This fact is associated with the morphological nature of Polish. Linguists and lexicographers are highly interested in homonymy, although for language analysis it is very often viewed as troublesome on both theoretical and practical levels. What can be noticed on the basis of a few examples given in this article, homonymy is often used purposefully in its impressive function which is based on ambiguity triggered by common or proper nouns. Any language homonymous ambiguity makes the language more attractive, dynamic and humorous.

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Exploring Phraseology in EU Legal Discourse

Eksploracja frazeologii w języku prawniczym Unii Europejskiej

Abstract

The aim of the present article is to showcase EU legal discourse as a unique phenomenon of supranational specialized communication and on the basis of authentic data analysis identify specific lexical items with a focus on multi-word expressions while considering their structure and function in the analysed text. The present analysis consists in researching a selected monolingual EU Directive in its English language version while using a mixed method approach. The results of analysis indicate that the EU Directive analysed in the presented structural and functional study contains a large proportion of multi-word expressions distinctive for legal language while adhering to the specific distributional patterns regarding the different structural and functional categories of lexical bundles. The article also gives an overview of contemporary scholars' research accomplished in institutional-legal discourse and translation.

Key words: *EU legal discourse, formulaicity, functional analysis, hybridity, legal language, legal texts, lexical bundles, multi-word expressions, phraseology, structural analysis.*

Abstrakt

Celem niniejszego artykułu jest ukazanie dyskursu prawniczego, jaki ma miejsce w Unii Europejskiej, jako niezwykłego zjawiska międzynarodowej komunikacji specjalistycznej i, na podstawie analizy rzeczywistych danych, wyszczególnienie specyficznych jednostek leksykalnych, kładąc przy tym nacisk na wyrażenia wieloczłonowe, w trakcie badań struktury i funkcji analizowanego tekstu. Ukazana analiza obejmuje badanie wybranej anglojęzycznej Dyrektywy Unii Europejskiej, przy użyciu metody podejścia mieszanego. Wyniki przeprowadzonych badań wskazują, że analizowana pod kątem struktury i funkcji Dyrektywa unijna zawiera znaczną ilość wyrażen wieloczłonowych charakterystycznych dla języka prawniczego, które nie zakłócają specyficznego układu syntaktycznego rozważanego z punktu widzenia występowania różnorodnych strukturalnych i funkcjonalnych kategorii leksykalnych. Ponadto, artykuł umożliwia wgląd we współczesne badania naukowe, jakie miały miejsce w sferze formalnego dyskursu prawniczego i translacji.

Słowa kluczowe: *dyskurs prawniczy Unii Europejskiej, formalność, analiza funkcjonalna, hybrydowość, język prawniczy, tekst prawniczy, jednostki leksykalne, wyrażenia wieloczłonowe, frazeologia, analiza strukturalna.*

Introduction

EU legal discourse represents a highly specialized discourse whose idiosyncratic linguistic-translational features have been explored by a number of researchers. (e.g. Gibová, 2010; Bednárová-Gibová, 2016, 2020; Biel, 2014; Klabal, 2019; Mori, 2018; Seracini, 2020; Sosoni, 2012; Trklja, 2017) EU legal discourse is distinctive for its specific terms and standardized form that have developed in the course of the last three decades. The specificity of EU legal discourse also consists in its multilingualism and hybridity. Texts produced by the institutions of European Union are expressed in twenty-four official languages. Such a multilingual translation routine has led to the formation of a brand-new and advanced variety of legal language, also referred to as 'Eurolect'.

From a discourse-analytical standpoint, institutional-legal discourse can be interpreted as 'hybrid, reproduced, mirror-image-like and horizontal' texts (Bednárová-Gibová, 2020) of which hybridity is one of the most distinctive features. (Bednárová-Gibová, 2017) With regard to the classification of EU discourse from the perspective of legal translation, Garzone as early as

2000 placed EU translation into the category of 'hybrid texts'. The author defines hybrid texts as "international instruments generated within the supranational multicultural environment, in particular EU legislation; [where] all language versions are authentic". (Biel, 2014a, p. 54) With regard to the concept of text hybridity, it was firstly proposed by Trosborg as far back as 1997 who is attributed with the introduction of a more sophisticated classification based on the compliance with cultural standards and who perceives EU institutional texts as hybrid political texts rather than legal ones. Biel with reference to the hybridity of EU discourse states that "EU law is a melting pot for national legal systems, languages and cultures" and further suggests that "EU language should be perceived as a multilingual legal language realised in distinct legal varieties of national languages with an interdependent conceptual system". (Biel 2014b, p. 337) Bednářová-Gibová aims to figure out the sources of that hybridity and its manifestations at various linguistic levels. (Bednářová-Gibová, 2017) Furthermore, the author also examines hybridity as one of the crucial factors in the process of creating transculture.

Crystal and Davy in reference with phraseology in legal language claims that this field has been commonly researched in regard to formulaicity, which has been observed as one of the most distinctive features of legal language. (Crystal, Davy, 1969) However, Biel reports that "legal phraseology has not been a popular topic in legal language studies" regardless of its high level of formulaicity which legal discourse is characteristic of. (Biel, 2018, p. 12) Nevertheless, the author points out to the changing tendency that has just recently started and that has been caused due to "the surge of interest in phraseology within corpus linguistics, which found its parallel in the legal domain...". (Biel, 2018, p. 12) Stanislaw Goźdz-Roszkowski and Gianluca Pontrandolfo in the introduction to their 2018 publication *Phraseology in legal and institutional settings* points to the fact that earliest studies of phraseology in legal language aimed attention at "those lexical items that displayed the highest degree of fixedness and repetition, i.e. binomials (e.g. *signed and delivered, act and omission*) and their extended versions: multinomials. The presence of this type of expressions in legal language was rightly perceived as one of the indicators of its formulaicity and standardisation, which can in turn lead us to understand the stylistic preferences in legal drafting". (Goźdz-Roszkowski, Pontrandolfo, 2018, p. 3). The authors emphasize the need to explore and analyse patterns of formulaicity, lexical bundles, in connection with legal discourse for the sake of achieving a deeper insight into legal language.

Another field of examination connected to the research in phraseology is terminology. In connection with terminology, Kjaer (Kjaer, 2007) points to “a strand of research which focuses on multi-word terms and collocations where at least one lexeme is a term”. Nevertheless, Pontrandolfo states that phraseology may operate as an element connecting the term and the text. (Pontrandolfo, 2015) “Phraseology should also be viewed through its close links with discourse. Seen from this perspective, phraseological research involves examining the organisation of language beyond the level of a sentence or a clause and focusing on larger linguistic units, such as conversational exchanges”. (Stubbs, 1983, p. 1). Goźdz-Roszkowski i and Pontrandolfo further point to a crucial function of legal phraseology in legal translation in the sense that “it is one of the discourse elements which mostly contribute to the naturalness of the translated text” and “which is one of the most difficult elements translators have to tackle in their job...”. (Goźdz-Roszkowski, Pontrandolfo, 2018, p. 4) Indeed, the authors claim that apart from terminology, legal translation is connected to an issue of conventions in phraseology. With regard to the course of near future research in phraseology, Goźdz-Roszkowski, and Pontrandolfo mention that “the link between legal phraseology and plain legal language” will pose a challenge “for both the academic and the professional communities”. Legal phrasemes are repeatedly regarded as elements which often complicate reading and understanding. (Goźdz-Roszkowski, Pontrandolfo, 2018, p. 4).

Lexical Bundles in Legal Language

Formulaic nature of general English phraseology with a focus on non-paremiological multi-word units has been eloquently discussed by Bednárová-Gibová and Jesenská. They provide us with a comprehensive definition of multi-word units/expressions which goes as follows: “a formulaic phrase or an utterance, consisting of several lexical constituents, ready-made in terms of its production, functioning as a syntactic and semantic whole whose meaning may be non-compositional”. (Bednárová-Gibová, Jesenská, 2019, p. 120). The term *multi-word unit* used to label phrasemes is reported to be preferred by “the natural language processing community, whereas [the term] *phraseological unit* seems to be the preferred term in the field of phraseology”. (Goźdz-Roszkowski, Pontrandolfo, 2018, p. 42) Apart from the term *multiword unit* and *phraseological unit*, Corpas Pastor presents several other terms used to when referring to a *formulaic sequence*, among them “multiword lexeme, multiword lexical unit, fixed expression, phrase figée, set

expression, set phrase”. (Corpas Pastor, 1996, p. 17) With respect to legalese, Biel calls attention to lexical bundles, which are “the most commonly researched multi-word units in the frequency-based corpus-driven approach”. (Biel 2018, p. 11) As we may see, references to lexical bundles may vary on the basis of a preference of different authors and are as follows: clusters, n-grams, chunks, lexical phrases, multi-word expressions/units/items/terms, multi-word lexemes, multi-word lexical units, fixed expressions, etc. Biber and Barbieri refer to lexical bundles as “building blocks in discourse” and “a kind of pragmatic ‘head’ for larger phrases and clauses, where they function as discourse frames for the expression of new information”. (Biber, Barbieri, 2007, p. 270) In addition, Biel states that lexical bundles provide common and recognizable frames “retrieved from memory which are filled in with new information...”. (Biel, 2018, p. 11) According to Biber and Barbier and Hyland, lexical bundles are merely recognized on the basis of frequency criterion. (Biber, Barbier, 2007; Hyland, 2008) In connection with the classification of lexical bundles, Biel provides us with the division based on two types of criteria – formal criteria, which focus on the length and structure of lexical bundles, and functional criteria:

“The length-based categorization takes into account a number of constituents in a bundle: if it contains three words, it is referred to as a 3-gram; if four words, a 4-gram; if eight words, an 8-gram. The structural categorization is based on the grammatical structure of lexical bundles, depending on whether they contain noun, verb or prepositional phrases and clause fragments” (Biel, 2018, p. 11).

Similarly, from the structural viewpoint, Trklja introduces lexical bundles as sequences usually consisting of three to six words. (Trklja, 2017) “These sequences are incomplete structural units both in semantic and grammatical terms and can be classified into different classes according to their functions” (Trklja, 2017). In addition, the author remarks that one of the most extensive research into the lexical bundles with regard to their textual function was accomplished by Nesi and Basturkmen. (Nesi, Basturkmen, 2006)

Roszkowski and Pontrandolfo proposes the categorization of tendencies in corpus research towards legal phraseology “(1) research into collocations; (2) research into routine formulae, (3) terminographically oriented studies, (4) cross-linguistic studies of phraseology, including translation, and (5) semantics of legal patterns”. (Goźdz-Roszkowski, Pontrandolfo, 2018, p. 12) However, with regard to lexical bundles Biel (2018) specifies that they “do

not fit the existing categorizations of legal phraseology” and therefore research into lexical bundles is classified under the second category – research into routine formulae. (Biel, 2018). “A traditional classification groups legal phrasemes, e.g., into: (1) multi-word terms, (2) collocations with a term and (3) formulaic expressions and standard phrases”. (Biel, 2018, p. 12) The group of ‘formulaic expressions and standard phrases’ is dealt with in Kjaer. (Kjaer, 2007) Biel in her 2014 publication *Lost in the Eurofog: Textual Fit of Translated Law* introduces a different classification that is arranged “specifically for the genre of legislation” and which “ranges from the global textual level to the local microlevel: text-organizing, grammatical and term-forming patterns as well as term-embedding and lexical collocations”. (Biel, 2014, p. 12) Nevertheless, the author calls attention to the fact that none of the above stated categorizations “embraces lexical bundles, which typically cut across all these categories, both structurally and functionally” and further adds that lexical bundles ought to be viewed as a category of its own, “as a distinct class of legal patterns in its own right, identified on the basis of frequency-based criteria (and thus incompatible with classifications based on other criteria)”. (Biel, 2014, p. 12) Nevertheless, the structures and functions of lexical bundles are presented and analysed in a separate section of the present article based on the analysis of a specific EU Directive No 1161/2019-EN version.

The Level of Formulaicity of EU Discourse

As early as 1983, Pawley and Syder conducted one of the first linguistic research of formulaic language. They claim that cognitive lexicon of language users “consists of holistically stored linguistic sequences” and “refer to these sequences as ‘lexicalized or institutionalized sentence stems’”. (Trklja, 2017) In addition, Trklja (2017) refers to Biber and Conrad who as far back as 1999 arranged a corpus-driven method as an approach for investigation of formulaic language. (Trklja, 2017) “The method, which was further elaborated in subsequent studies (e.g. Biber et al., 2004; Biber, 2009) focuses on the distribution of frequently recurring fixed sequences of words called *lexical bundles*”.

With reference to lexical bundles in legal discourse Biel (2018) mentions certain publications which aim attention at “how lexical bundles vary across English language legal genres in three legal systems: the EU, England and Wales, and the US, respectively”. (Biel, 2018) The publications are as follows: Jablonkai (2010), Breeze (2013) and Goźdz-Roszkowski (2011). Ja-

blonkai in her 2010 article *English in the context of European integration: A corpus-driven analysis of lexical bundles in English EU documents* accomplished research into the use of English in EU discourse “by investigating the most frequent word combinations in English documents issued by EU institutions”. (Jablonkai, 2010, p. 1) The research was based on “a mixed-genre corpus for ESP purposes and analyses the corpus of EU genres as a whole against the British National Corpus (BNC) (Sampler, Academic, News, Fiction sections) rather than against a reference corpus of a comparable genre, i.e. a UK legal/administrative corpus”. (Jablonkai, 2010, p. 1) The main objective of the research was to scrutinize lexical bundles in English language version of EU texts from the perspective of their functions and structures. Jablonkai concludes that the presented study demonstrates the high level of formulaicity of written English EU discourse in contrast to the reference corpora by applying lexical bundles with a high degree of frequency, suggesting that a considerable amount of EU text is comprised of formulaic patterns. (Biel, 2018)

“The EU corpus contains twice as many bundle types and six times as many tokens as the Academic prose section of the BNC; these rates are even higher compared to the fiction, news and general sections of the BNC. As for structural properties of EU bundles, bundles with noun phrases and prepositional phrases dominate the list (80%), but there is also an untypically high number of verb phrase bundles against the reference corpora”. (Biel, 2018, p. 12)

The Categorizations of Lexical Bundles

Goźdź-Roszkowski in his 2011 large-scale study *Patterns of Linguistic Variation in American Legal English. A Corpus-Based Study* offers comprehensive list of the structural types of the bundles in legal texts: (1) noun phrase with *of*-phrase fragment, (2) noun phrase with other post-modifier fragment, (3) prepositional phrase expressions, (4) verb phrase with passive verb, (5) verb phrase with active verb, (6) anticipatory *it* + verb phrase (usually passive), (7) adverbial clause fragments, (8) (verb/adjective+) *to*-clause fragment, (9) (verb phrase +) *that*-clause fragments. (Goźdź-Roszkowski, 2011, pp. 113-114) It should be noted, however, that the following list of the structural types is based on the American Law Corpus whose legal discourse may differ to some extent from that of the European Union. The author emphasizes that the above stated categories often occur in most genres. In

his study, the author proposes a proportional analysis of lexical bundles occurring throughout different structural categories that can be found in each of the selected genres. “For instance, the so-called “quantifier expressions”, i.e. bundles beginning with *all* (*all or any of, all or any part, all or any portion*, have been found only in contracts where they account for 6% of all the bundles”. (Goźdz-Roszkowski, 2011, p. 114) The author further suggests that the major character of lexical bundles in legal texts is phrasal and that more than 70% of all the bundles comprise of noun phrase expressions and prepositional phrases while bundles consisting of a verb phrase and dependent clause are likely to occur rarely. Concerning ‘noun phrase expressions’ the author states that those with ‘of phrase fragments’ represents more than 15% of all the lexical bundles comprising “a range of meanings in legal genres and in particular it is widely used to refer to various legal and other entities” (ibid). Apart from noun phrases, the author mentions bundles consisting of ‘adverbial clause fragments’ which were identified in the following legal genres that are of primary importance: legislation, contracts and judgments.

Besides the structural classification of lexical bundles the author proposes the other categorization, which is built upon the previous classifications as presented by Biber et al. (2004), Biber (2006) and Hyland (2008). “A framework for functional analysis of lexical bundles in legal texts was designed in such a way as to reflect the specificity and somewhat unique nature of legal data”. (Goźdz-Roszkowski, 2011, p. 117) From such a perspective, Goźdz-Roszkowski provides us with the following functional classification of lexical bundles: The first category encompasses bundles of legal reference and its seven subclasses: temporal bundles, location bundles, attributive bundles, participative bundles, institutional bundles, terminological bundles, and the last subclass of legal reference bundles, procedure-related bundles. The second major category presented by the author is text-oriented bundles which consists of these subcategories: causative/resultative bundles, condition bundles, clarification/topic elaboration bundles, focus bundles, framing signals, structuring bundles, transition bundles. The third major category is represented by stance bundles which are further divided into epistemic and attitudinal (ibid).

Methodology of the Present Analysis

Despite recent trends in institutional translation focusing on sociological lines of enquiry (e.g. Koskinen, 2017; Dam, Zethsen 2014; Bednářová-Gibová, Madoš, 2019), this article draws essentially on a text-based appro-

ach. The approach to the analysis presented in this article was inspired by the methodology incorporated by Goźdź-Roszkowski (2011) in his corpus-based study *Patterns of Linguistic Variation in American Legal English*. The author argues that he adopts a comparable methodology that had already been applied in the earlier studies of lexical bundles by Biber (2006), Cortes (2004) and Hyland (2008). In spite of the fact that the structural and functional categorizations provided by Goźdź-Roszkowski were arranged for the purpose of the corpus-based study of American Legal English, I assume that it can be applied to European Legal English as well since the present analysis deals with the same legal genre – legislation. Nevertheless, I suppose that both American and European Legal languages share certain features and have some points of intersection in terms of using the identical lexical items in that specific and specialized field of language.

However, unlike the above-mentioned comprehensive study by Goźdź-Roszkowski, the present analysis serves only as a pilot analysis aiming attention at only one genre of legal language – legislation. For the purpose of the analysis, a random act of EU legislation – Directive (EU) 2019/1161 selected from the EUR-Lex database. The focus of the analysis is on multi-word expressions that consist of three and more words which are supposed to be indicative or characteristic of legal language occurring in a genre of legislation that comprises 'directives', 'regulations', 'decision', 'recommendations' and other legislative acts. The multi-word expressions that have been chosen for the purpose of the present analysis will be tested in further research with the help of corpus linguistic software tools and online resources providing phraseological information. Among such online resources are the following ones: IATE, JURITERM, Euroterm, TERMIUM Plus, and several others.

The objective of the article is to illustrate EU legal discourse as a one-of-a-kind instrument of supranational specialized communication and from the structural and functional viewpoint determine its specific lexical units. The present analysis consists in researching the monolingual EU Directive in its English language version while combining both qualitative and quantitative methods. Qualitativeness of the presented analysis consists in hypothesizing about the data obtained from the empirical approach towards the text analysis.

The present analysis addresses the following research questions:

- Which multi-word expressions that are characteristic of legal language can be identified in an EU legislative act?
- What is the structure of those multi-word expressions recognized in the chosen EU act?

- Which kind of multi-word expressions with respect to their structure and function occur in the analysed text most frequently?
- What are the functions of those expressions?

A Structural and Functional Analysis of Multi-word Expressions in an Act of Legislation

Distribution of multi-word expressions across different structural types

From a structural perspective, the total number of all the multi-word expressions identified in the act of legislation *Directive (EU) No 1161/2019-EN version* accounts for 439. A half of them were identified as prepositional phrases with the number of 225. The most frequent ones were of *the European Parliament and of the Council* occurring 23 times, *in order to* occurred 17 times, and *in accordance with* 16 times. Such a great proportion of prepositional phrases goes in line with the finding by Goźdź-Roszkowski claiming that “in legal texts, prepositional phrase expressions are the most common structure overall, comprising on average, one-third of all lexical bundles” (Goźdź-Roszkowski, 2011, p. 115) while admitting that some genres may contain even a larger portion of them. Prepositional phrases deliver a wide range of functions that are described in the second part of the analysis, however, the most frequent ones are time and place indication, and indication of a variety of “logical relations between prepositional elements”. (Goźdź-Roszkowski, 2011, p. 115) The second highest proportion of occurrence in the text of EU Directive is represented by noun phrases with *of*-phrase fragments with the total number of 93, which is almost a quarter of all the multi-word expressions. This finding is similar to that of Goźdź-Roszkowski (2011) who reports that the noun phrases with *of*-phrase fragments make up for more than one quarter of all lexical bundles identified in his study.

Concerning the functions of this type of expression, they serve many purposes in legal genre, among them making a reference to different legal entities, in our case EU institutions; contracting parties; subject matters of different types of legal texts; and last, but not least, quantity. The third most extensive structural group of multi-word expressions is represented by verb phrases with modal verbs, especially those consisting of *should* and *shall*. Verb phrases with *should* accounts for 24 and verb phrases with *shall* make up for 16.

For the purpose of providing answers to the first, second, and third research questions, the most representative categories and their examples

identified in *Directive (EU) No 1161/2019-EN* version are presented underneath in the table:

Table 1: Overview of different structural types of multi-word expressions identified in the analysis

Categories of different structural types of multi-word expressions	Prepositional phrases	Noun phrases with <i>of</i> -phrase elements	Verb phrases with <i>should</i>	Verb phrases with <i>shall</i>	Other verb phrases with modals	Adverbial clause fragments	Verb + <i>to</i> -clause fragments	Verb phrase + <i>that</i> -clause fragments	Other
Number of items found	225	93	24	16	17	19	8	4	33

– prepositional phrase expressions:

in order to, in accordance with, on the basis of, in the context of, in this regard, at that point in time, in support of, in addition to, in the choice of, by means of, by an array of, with the requirements of, as a result of, in parallel with, within the time limit for, for the purpose of, during that period, by the aggregate of, by reason of, in so far as, in the case of, with respect to, at an earlier stage of, at the same time, by the following, by the Commission, by the contracts, under an obligation, due to the, in line with, under this directive, within the meaning of, by the scope of, for the provision of, in the next decade, in the coming years, for the period after, in this Directive, in compliance with, in favour of, in cooperation with, etc.

– noun phrases with *of*-phrase fragment:

the promotion of, the opinion of the, the procurement of, the achievement of, the objective of, the implementation of, the aggregate of, the purpose of, the categories of, the adjustment of, the renewal of, an array of, the allocation of, the inclusion of, the benefits of, etc.

– verb phrases with *should*

should be identified, should not be affected, should be aligned, should be defined, should not be blended, should also be counted, should not be included, should be noted, should be set, should be considered, should be provided, sho-

uld be required, should be facilitated, should be conferred on, should be accompanied, should therefore be amended, should take place, should take place, should set out, should be able to, should not apply to, should contribute to.

– verb phrases with shall

shall be defined, shall not be blended, shall be taken into account, shall be calculated, shall be assisted, shall be terminated, shall be presented, shall be laid down, shall apply to, shall not apply to, shall ensure that, shall continue to, shall submit to, shall bring into force, shall communicate to, shall enter into force.

– other phrases with modals

may adopt measures, can contribute to, can help ensure, can effectively help, should pursue policy measures, must be accelerated, will help to, will continue to, will contribute to, etc.

– adverbial clause fragments

as defined in, as laid down in, as compared to, as stated in, as noted in, as regards its scope, as described in, as reported in, as set out in, as was announced in, etc.

– verb + *to*-clause fragment

to exempt from the requirements, to meet the commitments, to meet the targets, to increase the proportion of, to amend that Directive, to implement this Directive, to comply with this Directive, to ensure uniform conditions.

– verb phrase + *that*-clause fragments

the Commission announced that, Market forecasts estimate that, the Commission concluded that, Member States shall ensure that.

– noun phrases connected to different entities, EU institutions, contracting parties, subject matters of legal texts, etc.

the Member States, the European Parliament, contracting authorities and contracting entities, the procurement procedures, the United Nations Economic Commission for Europe, etc.

Distribution of multi-word expressions across different functional types

The second part of the analysis is intended to answer the third and fourth research question. As can be inferred from the overview, multi-word expressions of the different functional categories are distributed in the analysed EU Directive unevenly. The most represented functional category of lexical bundles is that of 'legal reference' accounting for 239 items found while the least represented is the category of 'stance bundles' with only 36 items identified. Such a distribution across these functional categories corresponds

to that of Goźdź-Roszkowski claiming that “legislation, contracts and professional articles are clearly focused on legal reference, with relatively few bundles expressing stance and a moderate number of text-oriented bundles”. (Goźdź-Roszkowski, 2011, p. 118) Such an adherence of lexical bundles to that distributional pattern observable in legal texts is a very interesting phenomenon.

‘Legal reference’ bundles refer directly to both abstract and physical legal issues concerning entities, contracting parties, institutions, instruments, concepts, subject matters, processes, etc. ‘Text-oriented bundles’ are applied in order to signal both relationships between different textual segments and discourse organization. ‘Stance bundles’ serve for expressing attitudes or assessments. (Trklja, 2017; Goźdź-Roszkowski, 2011)

Table 2: Overview of multi-word expressions across major functional categories

Functional categories	Legal reference bundles	Text-oriented bundles	Stance bundles
Number of items found	239	90	36

Legal reference bundles

Table 3: Overview of subcategories of legal reference bundles based on the number of their occurrence

Categories of legal reference bundles	Temporal reference bundles	Location bundles	Attributive bundles	Participative bundles	Institutional bundles	Procedure-related bundles
Number of items found	16	42	96	7	70	8

Temporal bundles

The first subclass of the major category of legal reference bundles are time-indicating, which is typical for the genre of legislation to use time

expression frequently. From the structural viewpoint, temporal bundles are usually prepositional phrases. (Goźdz-Roszkowski, 2011) They can be exemplified as follows:

at that point in time, within the time limit for, at an earlier stage of, in the coming years, for the period from, for the period after, for the first reference period, etc.

Example: *The impact assessment recognised that markets for low- and zero-emission urban buses are characterised by increased market maturity, whereas markets for low- and zero-emission trucks are **at an earlier stage of market development.** (Directive (EU) No 1161/2019-EN version, (11))*

Location bundles

The purpose of location bundles is to refer to places, different entities, EU institutions, contracting parties, subject matters of contracts, etc. *in the Official Journal of the European Union, in the Union, in the contract, in Member States, in this Directive, etc.*

Attributive bundles

The purpose of attributive bundles is to “describe legal entities, concepts, instruments and processes by specifying their attributes”. (Goźdz-Roszkowski, 2011, p. 122-123)

the opinion of the, the procurement of, the achievement of, the objective of, the implementation of, the provision of, the date of, the purpose of, the adjustment of, the renewal of, etc.

Example: *Such measures include the increased use of Union funds to support **the renewal of public transport fleets and better exchange of knowledge and...** (Directive (EU) No 1161/2019-EN version, (26))*

Quantifying bundles

one or more, part of a, the proportion of, the number of, a percentage of, the total number of, the aggregate of

Example: ***The number of such vehicles, however, is expected to increase in the coming years, especially plug-in hybrids.** (Directive (EU) No 1161/2019-EN version, (13))*

Participative bundles

The role of participative bundles is to indicate “the presence and participation of various legal or natural persons in a particular legal process or

transaction. They help identify individuals or corporations that may benefit or, more generally, be affected by legal provisions or transactions or other actions". (Goźdz-Roszkowski, 2011, p. 124)

in support of, for the provision of, in favour of, etc.

Example: *'Directive 2009/33/EC of the European Parliament and of the Council of 23 April 2009 on the promotion of clean road transport vehicles in support of low-emission mobility'; (Directive (EU) No 1161/2019, Art. 1 (1))*

Institutional bundles

The function of institutional bundles is to make a reference to various legal entities, EU institutions, contracting parties, legal instruments, etc. In the genre of legislation there is a very frequent use of this type of bundles. (Goźdz-Roszkowski, 2011, p. 124)

the Member States, the European Parliament, the United Nations Economic Commission for Europe, the European Economic and Social Committee, etc.

Procedure-related bundles

The category of procedure-related multi-word expressions is the last from the extensive group of legal reference bundles. In connection with the use of 'shall', Goźdz-Roszkowski clearly illustrates several different functions of its using in the legal genre and the way a speech act is affected by such a usage of *shall*. "In many procedure-related bundles, a speech act is explicitly marked by the presence of shall. It is usually associated with carrying the illocutionary directive force of expressing command, imposing obligation or conferring legal rights". (Goźdz-Roszkowski, 2011, p. 127)

Procedure-related bundles with shall

shall apply to, shall not apply to, shall ensure that, shall continue to, shall submit to, shall bring into force, shall communicate to, shall enter into force

Example: *This Directive shall enter into force on the twentieth day following that of its publication in the Official Journal of the European Union. (Directive (EU) No 1161/2019-EN version, Art. (3))*

Text-oriented bundles

Table 4: Overview of subcategories of text-oriented bundles based on the number of their occurrence

Categories of text-oriented bundles	Causative/Resultative bundles	Condition bundles	Clarification/topic elaboration bundles	Focus bundles	Framing signals	Structuring bundles	Transition bundles
Number of items found	30	3	1	9	18	19	9

Causative/Resultative bundles

The first subclass of the second extensive category of lexical bundles indicates “causative connection between two propositions”. (Goźdz-Roszkowski, 2011, p. 131)

as a result of, by reason of, in order to, for the purpose of, for the provision of, due to the

Example: *Therefore, vehicles that meet the clean vehicles or zero-emission vehicles requirements **as a result of** retrofitting should also be counted towards the achievement of the respective minimum procurement targets. (Directive (EU) No 1161/2019-EN version, (15))*

Condition bundles

in the case of

Example: ***In the case of** vehicles using liquid biofuels, synthetic and paraffinic fuels, those fuels shall not be blended with conventional fossil fuels; (Directive (EU) No 1161/2019-EN version, Art. 4 (4)-(b))*

Clarification/topic elaboration bundles

at the same time

Example: *...to put the Union on a path towards low-emission mobility and **at the same time** strengthen the competitiveness of the Union’s mobility eco-system. (Directive (EU) No 1161/2019-EN version, (4))*

Focus bundles

The role of focus bundles is to indicate the introduction of a new topic. *by the following*

Example: *Article 2 is replaced by the following. (Directive (EU) No 1161/2019-EN version, Art. 1 (3))*

Framing signals

Hyland (2008, p. 14) defines framing signals as bundles that “situate arguments by specifying limiting conditions”. Goźdź-Roszkowski states that framing signals “are also used to specify the conditions under which a statement can be accepted, working to elaborate, emphasize or compare aspects of an argument”. (Goźdź-Roszkowski, 2011, p. 135)

on the basis of, in the context of, within the context of, with respect to, in this regard, in the case of, outside the scope of, in so far as, within the meaning of

Example: *Regulation (EC) No 595/2009 of the European Parliament and of the Council of 18 June 2009 on type-approval of motor vehicles and engines with respect to emissions from heavy duty vehicles (Euro VI)... (Directive (EU) No 1161/2019-EN version, Art. 4 (5)-(***))*

Structuring bundles

Hyland (2008, p. 17) states that structuring bundles function in two different ways: “[they] help organize the text by providing a frame within which new arguments can be both anchored and projected, announcing discourse goals and referring to text stages” and “[they] point to other parts of the texts to make additional material salient and available to the reader in recovering the writer’s intentions”. (Hyland, 2008, p. 17)

as defined in, as laid down in, as compared to, as stated in, as noted in, as regards its scope, as described in, as reported in, as set out in, as was announced in

Example: *...a vehicle of category M3, N2 or N3 using alternative fuels as defined in points (1) and (2) of Article 2 of Directive 2014/94/EU of the European Parliament and of the Council... (Directive (EU) No 1161/2019-EN version, Art. 4 (4)-(b))*

Transition bundles

In accordance with Hyland (2008), Goźdź-Roszkowski (2011, p. 137) proposes that transition bundles “are used to establish additive or contrastive links between elements”.

in addition to, as well as

Example: ***In addition to** zero-emission vehicles, today there are few light-duty vehicles with air pollutant emissions of 80% or less of the current emission limits. (Directive (EU) No 1161/2019-EN version, Art. (13))*

Stance bundles

The role of stance bundles as assumed by Goźdź-Roszkowski is “to express different attitudes or assessments”. (Goźdź-Roszkowski, 2011, p. 117) Stance bundles are of two major classes – epistemic and attitudinal.

Table 5: Overview of subcategories of text-oriented bundles based on the number of their occurrence

Categories of stance expressions	Epistemic stance expressions marking the Source or Perspective	Attitudinal/Evaluative (impersonal)
The number of items found	33	3

Epistemic stance bundles

Epistemic stance bundles are generally employed in order to indicate an author’s commentary “on the knowledge status of the information contained in the following proposition. Such status can be expressed as certain, uncertain, probable, possible, etc”. (Goźdź-Roszkowski, 2011, p. 138) In the case of the present analysis, however, epistemic stance expressions are predominantly used to refer to a source of certain information or label the point of view from which information is provided.

in accordance with, with the requirements of, in line with, in parallel with, in compliance with, under an obligation, under this directive, under each contract, etc.

Example: *Those powers should be exercised **in accordance with** Regulation (EU) No 182/2011 of the European Parliament and of the Council. (Directive (EU) No 1161/2019-EN version, (30))*

Attitudinal stance bundles

The purpose of attitudinal stance bundles is to convey attitudes of an author “actions or events described in the following proposition”. (Goźdź-Roszkowski, 2011, p. 138)

it is appropriate to, it is crucial to, it is desirable for

Example: *Given the very limited market for double-decker buses and their specific design limitations, it is **appropriate** to apply, during the first reference period covered by this Directive, lower minimum procurement targets for zero-emission vehicles... (Directive (EU) No 1161/2019-EN version, (16))*

Limitation of the Present Analysis

First and foremost, the limitations of the presented pilot analysis consist particularly in not applying corpus linguistic tools designed for effective analysis of texts while providing identification and precise quantification of the occurrence of different lexical items. Secondly, because of not using the tools for the investigation of the legislative act, the analysis was limited to only one act as the thorough analysis performed manually was time demanding. However, Biel and Engberg in connection with a traditional routine in researching legal texts argue the following: “[the] research into legal translation has been predominantly qualitative, product-oriented and descriptive and very often involved a manual analysis of small samples”. (Biel, Engberg, 2013) Klalal points out the recent advancement in the way of approaching research in legal translation arguing that we may observe a change in the preference of both quantitative and mixed approaches while frequently incorporating corpus linguistics. Thirdly, figuring out the exact number of each and every relevant multi-word expression identified in the text based solely on the analysis of just one legislative act certainly does not provide us with entirely satisfactory and valid results.

Furthermore, scrutinizing one legislative act in order to figure out frequencies of occurrence of individual lexical items would not serve the purpose, either. Nevertheless, Klalal argues that it is not necessary to incorporate extensive corpora in order to study legal language. Similarly, Bhatia claims that “due to the formulaic and conservative nature of legal language even an analysis of a single act may render comprehensive and valid results and frequencies are usually of secondary importance”. (Bhatia-Vijay, 2004) Last, but not least, Klalal in connection with frequency and size of the corpus proposes a statement that should be also taken into account and which may be crucial in order to understand the specificity, intricacy, and delicacy of the genres of legal language:

“Thus, for certain types of phraseological units (e.g. term-embedding collocations or multi-word terms) frequency should not be the only criterion (cf. Biel 2014). In addition, if studying terminology and phraseology of a specific branch of law, a single

act may be the only source of law applicable to the branch in the respective jurisdiction, and creating a larger corpus would compromise the homogeneity of the data” (Klbal, 2019, p. 168)

Last, but not least, the other limitation of the present analysis may consist in investigating only one type of legal texts, which is in this case the selected EU Directive. For further research there is a need to incorporate several other types of EU legal documents, such as Regulations, Treaties, Agreements, Judgements, Opinions, etc. in order to exclude potential genre-driven specificities.

Discussion and Conclusion

In spite of the fact that the present analysis is not intended to serve as a comparative analysis, but rather a mixed method approach study, it would be useful to put in contrast both the present and Goźdz-Roszkowski’s analysis in order to provide the answer for the proposed research questions. From the comparison of the data obtained from the present analysis and those provided by Goźdz-Roszkowski, it can be concluded that the EU Directive analysed in the presented structural and functional study covers the great number of multi-word expressions which are characteristic of legal language while adhering to the specific distributional pattern concerning the different structural and functional categories of lexical bundles. This is a very interesting phenomenon that can be observed in legal texts. The other inference that can be drawn from the analysis is that one of the most distinctive features of legal language is its high degree of formulaicity and repetitiveness. The present analysis of the authentic legal text also confirms the statement by Biber in which he suggests that “lexical units that cut across grammatical structures” and “have identifiable discourse functions [...] are important for the production and comprehension of texts”. (Biber, 2006, p. 155)

From the conducted research it follows that the selected text genre still offers a number of both theoretical and practical issues to reflect on, among them the question whether there are some specific lexical bundles that are exclusively characteristic of EU institutional legal texts (apart from those referring directly to EU institutions, EU concepts, EU parties, etc.) It should be noted as well that over the last few years EU legal language has experienced considerable progress, also as a result of the development of specialised corpus linguistic tools that allow for extensive explorations of sizeable legal text corpora. In addition, when exploring a degree of investigation to which

the present state of research into lexical bundles has proceeded, it is apparent that there has been a great advancement in the course of the last decade. Such a remarkable progress is evident when comparing the recent studies (cf. Biel, 2018; Goźdz-Roszkowski, 2011, 2018) to the earlier ones, for instance Gibová (Gibová, 2010, p. 112-115) where lexical bundles were referred to by hypernym “lexical clichés”. Such a shift from the hypernymous designation to the sophisticated functional and structural system of lexical bundles indicates a huge step forward in lexical analyses of institutional texts, especially with regard to phraseological analyses.

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Media reporting on coronavirus as a terminology forge: implications for translators and interpreters

Doniesienia medialne o koronawirusie jako źródło terminologii: implikacje dla tłumaczy

Abstract

This article postulates the existence of a language, terminological and communicative phenomenon which the author calls *intermediate terminology*. The adjective intermediate refers to one of the functions: mediation between specialist terminology and the media discourse. The proposed definition of intermediate terminology emphasizes fuzziness and short-lived communicative functioning. Even though a large part of the article is devoted to defining and explain the phenomenon of intermediate terminology, a key point of this article is to provide professional translators and interpreters with tools of effective handling of this terminology. This is why the article ends with selected recommendations for professional translators and interpreters as well as for the students of translation and interpreting.

Key words: *terminology, intermediate terminology, terminology work in translation and interpreting, COVID, technological (ICT) support in terminology work.*

Abstrakt

Niniejszy artykuł postuluje istnienie zjawiska językowego, terminologicznego i komunikacyjnego, które autor określa mianem terminologii pośredniej. Przymiotnik pośrednia odnosi się do jednej z funkcji tego typu terminów: pośrednictwa między terminologią specjalistyczną a dyskursem medialnym. Proponowana definicja terminologii pośredniej kładzie nacisk na nieostrość granic pojęciowych i krótkotrwałe funkcjonowanie komunikacyjne. Mimo, że znaczna część artykułu poświęcona jest zdefiniowaniu i wyjaśnieniu zjawiska terminologii pośredniej, kluczowym punktem tego artykułu jest dostarczenie profesjonalnym tłumaczom pisemnym i ustnym narzędzi efektywnego posługiwania się tą terminologią. Dlatego też artykuł zamyka zestaw rekomendacji dla tłumaczy ustnych i pisemnych oraz dla studentów kierunków translatorskich.

Słowa kluczowe: *terminologia, terminologia pośrednia, praca z terminologią w tłumaczeniach pisemnych i ustnych, COVID, wsparcie technologiczne (ICT) w pracy z terminologią.*

Introduction

This article is an attempt to prove that when performing its essential role of communicative mediation, media give rise to a specific type of terminology, which is one of the ways of realizing its mediating function. We claim that this type of terminology occupies an intermediary position between one or more specialist domains and the public discourse. However, from the perspective of Polish media, this type of terminological mediation overlaps with another type of intermediation: interlingual translation of terminology. In Polish media, the primary mediation between specialist texts and the public discourse often coincides with a secondary mediation – between the terminological networks in English-language media and their translations, borrowings or adaptations into Polish. This latter type of mediation is crucial for the practical objective for this article: to prove that professional translators – and interpreters in particular – can benefit from realizing the existence of intermediate terminology and develop appropriate strategies for managing it.

The case in point in our article is how media reports forge intermediate terminology related to the phenomenon of coronavirus pandemic. The mediation takes place here between such domains of discourse (and termino-

logy) as medicine, healthcare, politics, public life and lifestyle, macro and micro-economy and education. This mediation produces a number of concepts and terms that relate and “codify” smaller (e.g. *coronavirus*) or bigger (e.g. *the new normal*) portions of experienced reality. From the translation and interpreting point of view, it is vital to note that some such concepts are imported to languages like Polish from English (e.g. *nowa normalność*), while others seem to be local coinages (*wymazobus*). Both require recognition, storage and management on the part of translators and interpreters¹.

The nature of intermediary terminology

The concept of intermediary terminology that we postulate for this article requires elaboration. First of all, it must be situated against the notion of terminology per se. Sager defines terminology as “...the study of and the field of activity concerned with the collection, description, processing and presentation of terms, i.e. lexical items belonging to specialised areas of usage of one or more languages,” (Sager, 1990, p. 2) which translates onto three major domains of terminological research and practice:

1. Practices and methods for collecting, describing and presenting terms,
2. Theoretical underpinning of the practices in point 1,
3. Resultant collections of terms in fields of specialist knowledge. (Sager 1990, p. 3)

As observed by ten Hacken, (Hacken, 2015, p. 3), in the classical approach, terminology is to provide the minimum (necessary and sufficient) conditions for a concept. This approach rests on the Aristotelian square of oppositions (Elkin, Tuttle, 2012, pp. 5-6) and uses discriminatory ways of determining what is and what is not the *thing* (concept, object, phenomenon or practice) covered by the term. This system is also used to ascertain that two relatively similar *things* (*genus proximum*) can still be differentiated (*differentia specifica*) and thus classified as distinct terminological items – referring to distinct concepts, objects, phenomena or practices etc.

Ten Hacken (Hanken, 2015) observes that with the rise of the cognitive understanding of lexical phenomena (e.g. the prototypical nature of meaning and understanding of *things*), the Aristotelian framework proved problema-

¹The list of potential addresses of the practical part is longer and can be expanded to cover many other types of language specializations, including terminologists and lexicographers. However, the main pragmatic focus of this article remains on terminology for translation and interpreting purposes and hence throughout the text reference is made only to these two professions.

tic for understanding terminology – its emergence and use. Fuzziness of categorial boundaries is pointed out as one of the problems:

For a significant part of specialized vocabulary, imposing a terminological definition is problematic, because it is a fairly arbitrary decision to fix precise boundaries in a continuum. The relevant concepts are based on prototypes, in the same way as natural concepts. We only find strict terminological definitions when it is necessary to determine exact boundaries. (Hacken, 2015, p. 3)

The prototypicality and fuzziness of terminology results from our conceptualization processes, which implies that understanding of terminology can also be a problem in the context of a given discourse (in a given time, culture, context etc.), and hence of a given person or group. In this sense, terminology ceases to be seen as a solely formal or pragmatic, linguistic or epistemological issue. To understand the sources of fuzziness and changes in prototypicality, we need to open terminological studies to the facts of textual communication (see *Communicative Terminology Theory*, as discussed below or the so-called socioterminological optics, represented by such terminologists as Boulanger (Boulanger, 1991), Guespin (Guespin, 1991) or Gaudin (Gaudin, 2003)).

In a somewhat simplified manner, we thus argue in this article that terms can occupy diverse positions on a cline between “precise definitions of underlying concepts” – exemplified by “legal and scientific contexts” (Hacken, 2015, p. 3) – and domains like the postulated intermediate terminology, which is partly anchored in the scientific or other specialist fields, but which communicatively seeks generalization (“umbrella terms”) for public use. This fuzziness of categorial boundaries and a tendency towards terminological generalization are – in our view – distinctive features of intermediate terminology. To illustrate the point, let us use the example of the distinction between the scientific concept of *SARS-CoV-2* and its “media representation” in *coronavirus* in English or *koronawirus* in Polish.

The third distinctive quality of intermediate terminology is that only some of these creations persevere in media discourse, while others drop when media discourse shifts to another topic. Those that survive can be said to change their position in the cline from temporary, ad-hoc creations towards classically defined terminological items. For example, it is rather unlikely that terms like *wymazobus* (*mobile COVID testing facility*) stay in Polish for longer than the end of the mainstream media debate on COVID. This short-lived nature of intermediate terminology is a challenge for translators

and interpreters, since concepts like *wymazobus* are highly unlikely to be found in a published dictionary or other publicly available or specialized terminological resources.

The communicative network behind intermediate terminology

Communicative Theory of Terminology, outlined e.g. by a number of contributions by María Theresa Cabré (see e.g. Cabré, 2003), is among more recent approaches to terminology. Without refuting the cognitive and the linguistic dimensions, Cabré postulates a communicative layer of terminological research. These three dimensions are parameters that can be positioned on three scales. Thus, the legal or scientific terminology – as understood by ten Hacken (Hacken, 2015) quoted above – tends towards little communicative contextualization, while e.g. marketing, psychology or media texts display a stronger tendency towards metonymy, metaphorization, generalization and contextual framing of sense (relation to reality) and meaning (semantic value).

Intermediate terminology – as postulated here – has the communicative parameter set at the maximum. In our view, this defining quality of intermediate terminology stems from the nature of the communicative interaction it is part of. To illustrate this point, we present a table below, showing the mutual interactions of diverse fields of knowledge, practice and terminology with media reporting on the COVID pandemic in the first half of 2020.

Table 1: COVID in the media coverage discursive framework (own research)

<p style="text-align: center;">HEALTHCARE</p> <ul style="list-style-type: none"> – reorganizing healthcare structures – equipment and lack thereof 	<p style="text-align: center;">RESEARCH</p> <ul style="list-style-type: none"> – medical research – statistical models and forecasts – COVID-related IT apps 	<p style="text-align: center;">ENVIRONMENT</p> <ul style="list-style-type: none"> – curbed production leads to lower pollution – masks and gloves thrown to rivers and seas
<p style="text-align: center;">MICROECONOMY</p> <ul style="list-style-type: none"> – service providers in some industries in trouble on lockdown 	<p style="text-align: center;">MEDIA REPORTING ON CORONAVIRUS</p>	<p style="text-align: center;">POLITICS</p> <ul style="list-style-type: none"> – state responses to COVID

– layoffs and furloughs		– elections and political conflicts (UK, PL, US)
MACROECONOMY	LIFE AND LIFESTYLE	EDUCATION
– state-level aid needs – economic indexes down – looming recession	– lockdown as a problem for family life, well-being and parenting – cultural institutions and churches in lockdown	– “forced” educational “revolution” – important examinations in pandemic circumstances

COVID became a topic for communicative cross-interactions in domains like healthcare, economy, politics, research, lifestyle, environment and education. Taking into account the speed of the pandemic transmission (at some stage) and the topicality of the issue – from the media perspective – one can imagine that the representatives of the media were in need of vocabulary that would help them adapt some complex medical, economic or political concepts to the perception of media audiences.

From among the framework of terminological cross-interactions illustrated above – which is in no way exhaustive – we only choose healthcare and economy for analyses in the remaining part of the article.

The data corpus: parameters of terminology selection

The COVID pandemic-related terminology meets the three main defining qualities we postulate for intermediate terminology:

1. Media discourse on COVID requires a terminological mediation and generalization of specialist terminology to make it cognitively available by general, non-specialist audiences.
2. However serious in its consequences, COVID makes an ideal case of a “media event”. It is accompanied by an extensive conceptual framework, yet much of it will not persevere in either specialist or non-specialist, public discourse. At the moment of writing this text (May-June 2020), COVID is still a “topical issue” and new lexical items are added to the framework almost everyday.

Taking these features into account, we selected terminological items that relate to specialist concepts or ones that are umbrella terms for health or economic phenomena related to COVID. However, pursuing the practical

objective of our research, we collected items that are translated, adapted or borrowed from English into Polish. Finally, of our interest are also items that are original Polish creations, worth mentioning in the context of potential translation or interpreting from Polish into English.

The data corpus: parameters of source selection

Before we present the data corpus, let us expound on how we sought for the data. The primary source of terminology for my research were the Internet services of media outlets. Most useful for my purposes was synthetic media coverage of COVID. Among such providers, the American Reuters News Agency and the Polish TVN24 channel turned out particularly useful. We depended for data on *My Reuters App*, which features a dedicated section on coronavirus coverage.

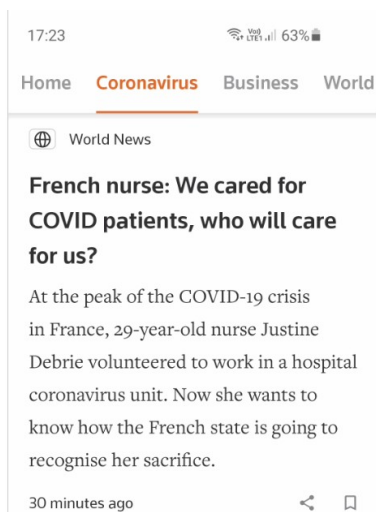


Figure 1: My Reuters App with COVID coverage section (My Reuters App...)

The TVN24 channel offers a TVN24 GO web service, and the main interest for me was the news bar of the service, since it repeatedly displays information concerning COVID. The news bars are exactly the space where intermediate terminology can be expected, also in ad-hoc translation from English. Moreover, the TVN24 channel features a dedicated series entitled *Koronawirus Report (Coronavirus Report)* that covers a vast area of COVID-related issues.



Figure 2: News bar and Coronavirus Report at TVN24BIS_GO (TVN24BIS_GO...)

Social media are equally instrumental, also because the major media outlets, like the ones mentioned above, use them for flash messaging. In our case, Twitter turned out to be an efficient “news provider” for our data acquisition. This, for example, was the case with information from the Polish Press Agency (PAP) and their dedicated, synthetic coronavirus service. (*PAP Biznes...*)



Figure 3: Twitter service of PAP Biznes with daily Coronavirus reports (PAP Biznes @Twitter...)

On clicking the link in the tweet, the user is redirected to the PAP web service. It contains a useful batch of information and terminology on issues like Coronavirus, but also on a lot of other topical economic and political facts and figures.

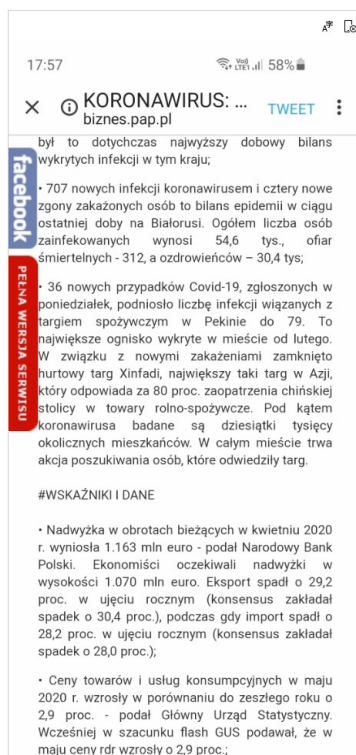


Figure 4: PAP webservice – a daily batch of data and terminology (PAP BIZNES...)

Twitter is also a platform for exchange of views between non-journalists, specialists, politicians or journalists expressing their “private” comments and opinions. This gathering of speakers creates a perfect framework for an emergence of intermediate communication. This is where facts (terms) and figures are translated (interpreted) by the specialists and the commentators with the use of intermediate terminology.

Finally, to learn more about the frequency of use and variant diversity of the particular items registered for my research, we also relied on Google search engine.

The data corpus: presentation

Below we present two tables with selected intermediate terms in the field of COVID pandemic, collected from mid-May until mid-June 2020². The first table covers the terminological field of medicine.

Table 2: COVID-related medical intermediate terminology (own research)

MEDICINE EN > PL	
English term	Polish translation
coronavirus	koronawirus
curve flattening	wypłaszczenie/anie krzywej wypłaszczanie się krzywej
herd immunity	odporność populacyjna, odporność środowiskowa, odporność grupowa, odporność stadna, odporność stada
medics	Medycy
pre-existing conditions	choroby wcześniej istniejące, wcześniejsze choroby, choroby wcześniej przebyte
coexisting conditions	choroby współistniejące
drive-thru test(ing) site, centre, location	punkt drive-thru, test drive-thru (“drive-thru”)
transmission clusters	ogniska infekcji
local transmission	transmisja lokalna, rozprzestrzenianie się lokalne
community transmission	? transmisja środowiskowa ? rozprzestrzenianie się środowiskowe
MEDICINE PL > EN	
Polish native creations	closest equivalents
szpital jednoimienny	coronavirus hospital, COVID specialized hospital
wymazobus	mobile testing bus, swab test bus, swab collection facility

The terms collected in the table above represent different positions on the cline between the prototypical terminological items – with precise meaning, sense and reference – and the intermediate concepts used as interlin-

²For reasons of brevity we exempt ourselves from providing detailed referencing of sources of intermediate terminology discussed herein. These sources are listed in the References with their links. Also for the space limits of this article, we are unable to discuss each and every item mentioned in the tables, even though almost each has an interesting story to tell in terms of its language, terminological and communicative status and origin.

gual and intralingual translations for media purposes. Some concepts can be said to represent prototypical items formally, but we decided to store them since they develop a particular meaning in the intermediate communicative context of the COVID pandemic. Thus, *pre-existing* and *co-existing* conditions are prototypical medical concepts in both English and Polish (*choroby wcześniejsze, choroby współistniejące*). Their exclusively intermediate status (short-term communicative use in COVID) is hard to determine. Similarly, the concept of *transmission cluster(s)* and its Polish counterpart *ognisko/a infekcji* are classical terms, let alone the fact that there is hardly any translation or borrowing taking place between the English and Polish conceptualization of the notion (English *cluster* can be translated as *zbirowisko*, while Polish *ognisko* can in this context be best rendered as *focal point*).

Conversely, the notion of *herd immunity* and its Polish equivalents (*odporność populacyjna* or *odporność środowiskowa*) represent a different case. On the one hand, they are attested in professional communicative contexts independent of COVID-related discourse. However, one of the Polish equivalents attested in the media is *odporność stada* or *odporność stadna*, which seems to employ a direct, non-metaphorical translation of the herd component of the English original. This form predominates in media coverage (particularly with reference to the early-stage approaches to COVID in Britain or Sweden), which suggests its predominantly intermediate status. Similar cases include *curve flattening* and its Polish equivalent (translation) *wyplaszczanie/wyplaszczanie krzywej*, which is attested in research reports unrelated to COVID (medicine, economy), but which develops its new, intermediate meaning and sense in the COVID context (a strategy to alleviate problems of state healthcare services when faced with a potential uncontrolled flood of COVID patients).

The opposite, ultimate position on the scale, that is in a sense the “prototypical intermediate concepts” is occupied by both English *coronavirus* – as an intermediate term for the specialist notion of *SARS-CoV-2*, along with a range of its variants and related contextual meanings (medical, economic, political etc.). The Polish *koronawirus* can therefore be seen as representing two levels of terminological mediation (primary and secondary). The primary mediation relates the English specialist term *SARS-CoV-2* to the form *coronavirus*, prevalent in the English-language media. While the secondary mediation is realized through its rendering into Polish *koronawirus*. Worthy of a note is that some Polish media – though infrequently – use the more “domesticated” phonological variant of the word: *koron-o-wirus*, which is an interesting case of the use of -o- as a typical linking device in Polish compounding (see e.g. (Klimkowski, 2003) and literature quoted therein). So-

me Internet users are unsure about choosing between the two forms, which can be suggestive of an early stage of the institutionalization of this item in the lexicon of the Polish language (see e.g. (Bauer, Lieber and Plag, 2013) for the definition and discussion on the concept). In the context of this article, this instability of choice displayed by some users proves the intermediate status of the term under discussion, irrespective of its phonological realization.

One more interesting case of intermediate terminology listed above is *drive-thru test(ing)* and its Polish renditions into *punkty drive-thru*. It seems justifiable to argue that the terminological mediation in English exploits the metonymic use of the *drive-thru* concept, originally denoting a type of fast food restaurant. Thanks to the presence of similar fast food facilities in Poland, the secondary mediation (between English and Polish) imposes relatively low interpretive burden on the speakers of Polish (at least those who are *drive-thru* customers).

Two more cases of interest are native Polish mediations: *szpital jednoimien-ny (coronavirus hospital)*: a dedicated hospital or ad-hoc adapted/constructed unit) and *wymazobus (mobile COVID testing facility)*. It is hard to relate either of these concepts to any potential, overt English source term. Thus, they can be said to represent primary mediation, devoid of the translation aspect.

Surprisingly enough, we have also found out that while the term *local transmission* easily relates to Polish *rozprzestrzenianie się lokalne/miejscowe* and *transmisja lokalna* (in and out of the context of COVID), the notion of *community transmission* seems to have no direct Polish counterpart: we were not able to confirm the existence or use of either *transmisja środowisko-wa/społeczna* or *rozprzestrzenianie się środowiskowe*. Our study is certainly not detailed enough to enable our definitive conclusion on this case, yet, this situation can undeniably be used to highlight the fuzzy and random nature of intermediate terminology.

The economic concepts relating to COVID display similar phenomena and the secondary mediation seems more evident.

Table 3: COVID-related economic intermediate terminology (own research)

ECONOMY EN > PL	
English term	Polish translation
lockdown curbs	lockdown, obostrzenia, ograniczenia, obostrzenia związane z lockdownem
loosen curbs, lockdown, lift curbs	luzowanie obostrzeń
new normal	nowa normalność

social distancing	dystansowanie społeczne, dystans społeczny
furlough	urlop (przymusowy)
layoff	urlop przymusowy, czasowe zwolnienie z pracy, czasowe zwolnienie z obowiązku świadczenia pracy
infodemic	Infodemia
ECONOMY PL > EN	
Polish native creations	closest equivalents
odmrażanie gospodarki	“defrost” the economy, economic recovery, restart the economy, (economic) thaw

Apart from concepts like *furlough* and *layoff* and their (potential) Polish counterparts like *urlop*, *urlop przymusowy*, *czasowe zwolnienie z pracy*, the majority of cases here are “prototypically” intermediate terms. For example, *nowa normalność* occurred on the Twitter account of Poland’s Ministry of Health no later than a day after the concept was announced by the British Government (*new normal*). An interesting case is that of *dystansowanie społeczne*, which prevailed in the first period of the pandemic, to be gradually substituted by *dystans społeczny*, which might be due to the potentially emotionally negative reading of the Polish concept of *dystansowanie*, most evident in the verb *dystansować się* (*oppose something or someone, refute*).

The only case attested for native Polish intermediate economic terminology is *odmrażanie gospodarki*, which seems to have no direct English conceptualization employing “defreeze” or “defrost” in a metonymic take. Instead, English-language media rather opt for concepts like *economic recovery*, or *restart(ing) the economy*. Only in the case of reports on the situation in China (city and province of Wuhan, in particular), some press reports made use of the concept of *thaw* to denote a gradual transition from the negative pandemic trajectory to a plateau in the number of infections, which opened a way to an economic restart by the hard-hit Chinese economy. Interestingly enough, some English-language media reporting from Poland abroad (e.g. polandin.com) *did* use the term “*defrost*” *the economy*, retaining the quotation marks – which signals the authors’ perception of the intermediate nature of the concept in use. In this instance, we deal with a primary and secondary mediation, yet with the reverse order of interlingual transfer (Polish to English).

Implications for language specialists

My analysis so far focused predominantly on the linguistic, terminological and communicative status of intermediate terminology. In what remains,

we would like to address this phenomenon as a performance challenge for translators and interpreters. The rationale for this claim is that the COVID pandemic is extremely likely to surface – more or less directly – during conferences, meetings and symposia throughout the coming twelve months or so. It may be directly addressed as a conference topic, but we expect it to be even more frequently present in its indirect form. We find it highly likely that almost each conference in the near future – and in particular those events that were cancelled or postponed due to the pandemic – will start with at least some mention of the pandemic. Unlike the specialist conferences, devoted directly to COVID, this second kind of reference is more likely to rely on intermediate terminology. A complication that interpreters are more likely to face is that with COVID being an off-side topic, an interpreter will not be briefed by the client that he or she has to cover COVID in interpreting. Thus translators – and interpreters, in particular – must be ready to handle COVID as an off-side topic with the use of intermediate terminology.

Intermediate terminology – as defined above – differs from prototypical terms also in how a translator or an interpreter can search, store and use it. Two issues stand out in the context of the previous discussion in this article. Firstly, since intermediate terminology is rather short-lived, searching for it and storing it for potential use must take place simultaneously to a phenomenon covered by the terminology. In other words, this kind of terminology is easier to find when the issue, like COVID, is topical and reported by the media. Conversely, searching for COVID-related media items and terms may be far more problematic and painstaking (in terms of time, effort and quality assurance) in something like a year ahead. The topic is not likely to have such a vast media coverage then and a need for intermediate terminology in this field will die out.

In our case, data collection began in late April 2020 and we plan to continue until late 2020. Apart from the practical side, our data collection effort is also motivated by our research plans. We will attempt to juxtapose the findings presented here against my future data analyses and observations. The objective is to further prove the status and the changing nature of intermediate terminology as a language, terminological and communicative phenomenon.

Secondly, getting ready to handle translation and interpreting of intermediate terminology requires a modification in how a translator and an interpreter prepares for the task. A standard mode of terminology work can be said to proceed from a terminology item as a problem, through reference to the specialist sources like dictionaries, encyclopaedias or other auxiliary texts as instruments, until arriving at a terminological (translation) solution.

To illustrate this process, one can use the example of translating the English notion of *curve flattening* into Polish:

1. Problem: *curve flattening*
2. Method and instrument: Internet search for the item and its subject-related, language-structural and stylistic contextualization
3. Result: *wypłaszczenie krzywej* (outcome) or *wypłaszczanie krzywej* (process)
4. Solution: adopting the concept in translation/interpreting, respecting the contextual variation

The methodology for intermediate terminology collection that we would like to recommend uses a different approach. It consists of two main steps:

1. Develop a methodology of regular following media coverage to be able to detect phenomena that are likely to become sources of intermediate terminology
2. Develop a methodology for data collection, storage and on-demand retrieval of intermediate terminology

Step 1 has already been discussed (see the sections: *The data corpus: parameters of data selection* and *The data corpus: parameters of source selection*). Modern media – social media in particular – can be an excellent tool for the purposes of intermediate terminology spotting and collecting, since they offer extensive filters (personalization) allowing better-informed choices for the media outlets in the function of terminology providers.

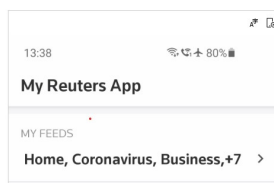


Figure 5: Options for feed personalization at My Reuters App (My Reuters App...)

The filters are extremely advantageous in reducing the time and effort needed to get the data, since to a large extent they free us from trial-and-error browsing and terminology search. It is true that at some stage, the terms provided by the media need a final confirmation via web-search or other standard quality procedures, yet it is perhaps obvious that *confirming* a term takes far shorter, and is less cognitively demanding than *looking for* it.

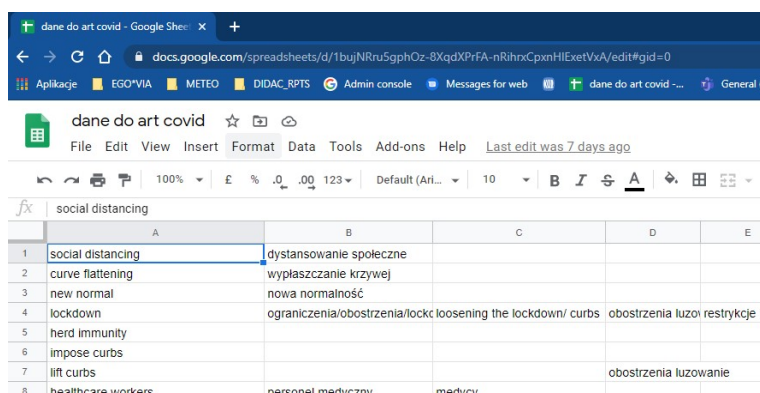
In the case of intermediate terminology, the methodology for data collection and on-demand future retrieval must be developed carefully, and

must match the individual style of work of translators and interpreters. Our personal choice was to set a dedicated Google Sheet file that we could access both from a PC desktop and a smartphone. This choice has to do with the fact that our approach to the COVID-related intermediate terminology was close to the definition of incidental learning: in free-time breaks we used a smartphone to browse the flash messages about COVID, and if a notion we found was worthy of an investigation, we looked for further sources. Let us illustrate that approach with how we handled the notion of Polish *luzowanie obostrzeń* (*loosening restrictions/curbs*), which we first spotted on 20 April 2020. The stages of researching this item were as follows:

1. Opening a tweet from Ministry of Health containing *luzowanie obostrzeń*.
2. The notion seemed intriguing for its potential English-language origins, so we decided to have it on the list and check for potential English-language variants
3. We put it to the dedicated Google Sheet file (glossary).
4. The English *loosening the restrictions* was extremely easy to find via simple web search, along with its contextualization.
5. We put it to the dedicated Google Sheet glossary.

To perform stages 3-5 quickly and effectively, we need to rely on a quick-access storage space. This also means we need access from any device we are using at the moment. Google Sheets meet these criteria for storage, allowing fast and uncomplicated recording of raw data in a tabular form (glossary) from any device at our disposal.

To make our access to the data sheet faster from the PC desktop, we created a direct link to the file on our browser's main interface, as illustrated below.



The screenshot shows a web browser window with a Google Sheet titled "dane do art covid". The sheet contains a table with the following data:

	A	B	C	D	E
1	social distancing	dystansowanie społeczne			
2	curve flattening	wypłaszczanie krzywej			
3	new normal	nowa normalność			
4	lockdown	ograniczenia/obostrzenia/lock	loosening the lockdown/ curbs	obostrzenia luzu/ restrykcje	
5	herd immunity				
6	impose curbs				
7	lift curbs			obostrzenia luzowanie	
8	healthcare workers	personnel medyczny	medycy		

Figure 6: Short-cut link to my COVID data storage (own research)

In a similar way, we placed a short-cut icon to the data sheet on our Android smartphone interface. An alternative solution for a smartphone is to use a dedicated, programmable function button on a phone's chassis, which most smartphones offer.

As can be observed, the methodological order of the standard mode of terminology work is – as if – reversed in our approach to handling intermediate terminology. The standard mode relies on a deliberate search for knowledge that has been recorded in text and terminology resources. Under the methodology proposed here for intermediate terminology, the terms, their translations and contextualization are provided to us by the media. Hence, the main effort of a translator or an interpreter resembles the work of a lexicographer: to collect data and make it ready for on-demand future retrieval and revision. This can be done effectively thanks to modern media and ICT tools, which turn out extremely handy in handling of intermediate terminology for translation and interpreting purposes.

Conclusions

This article argues that contemporary media provide a space for an emergence of a specific language, terminological and communicative phenomenon, which the author names intermediate terminology. The definition of intermediate terminology proposed here emphasizes its generality, fuzziness (overlaps with other concepts, their context-dependent use) and its short-lived communicative functioning. This behaviour is a direct consequence of the nature of media communication practices. Thus, a concept like *curve flattening* – in its COVID-related meaning, referring to the particular strategy of approaching the pandemic – may cease to be used in that meaning when COVID is no longer a public and a media issue. Owing to these three defining qualities, the postulated phenomenon should be theoretically approached from the position like the one adopted by the Communicative Theory of Terminology. Even though a large part of this article is devoted to explaining and defining the notion of intermediate terminology, a key point of this work is to provide professional translators and interpreters with tools of effective handling this kind of concepts. This is why the article ends with selected recommendations for handling intermediate terminology, addressed to professional translators and interpreters as well as to the students of translation and interpreting.

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Structural and semantic approach to the study of political debate

Strukturalne i semantyczne podejście do stadium debaty politycznej

Abstract

The article breaks new ground in the integrated study of structural and semantic manifestations of political debate in online discourse during the period of election campaign.

The study of political debate in the presidential election campaign is considered to be of vital importance as it makes possible to analyze the evolution of political thinking as well as to find the ways of civilized political dialogue, which is extremely important for the world community. In modern international arena, political debate is viewed as a contention or dispute over political issues and controversial topics. In the article, given political debate (polemics) is regarded as a contentious argument that is intended to support a specific position through attacks on a contrary position. The paper studies the political debate as a genre of literature through the description and analysis of its semantic content in which journalistic genre, political narrative and political discourse are reflected; it also defines the role and place of political debate in architectonics and compositional organization of English political discourse.

According to the objectives, integrated linguo-stylistic analysis of the structure of modern political debate in the online discourse has been conducted as well as

lexical and semantic ranging of lingual units in the space of political debate has been highlighted.

The study has clarified new ways of arranging semantic space and explored stylistic resources of language in the political debate.

Key words: *political debate, linguistics, stylistic features, euphemisms, phraseological units, lexical-thematic group.*

Abstrakt

Artykuł przełamuje standardy przyjęte w zintegrowanych badaniach nad strukturalnymi i semantycznymi formami wyrazu obecnymi w debacie politycznej prowadzonej online jako dyskurs w okresie kampanii wyborczej.

Badanie debaty politycznej odbywającej się w prezydenckiej kampanii wyborczej uznaje się za niezwykle ważne, gdyż umożliwia ono analizę ewolucji politycznego myślenia jak również ukazuje przebieg cywilizowanego dialogu politycznego, co jest niezmiernie ważne dla światowego odbiorcy. Na współczesnej arenie międzynarodowej dialog polityczny postrzegany jest jako pojedynek na argumenty czy dysputa w kwestiach politycznych i kontrowersyjnych. W niniejszym artykule, debata polityczna (polemika) postrzegana jest jako argument zaczepny użyty w celu wzmocnienia obranego punktu widzenia w ataku na odmienny punkt widzenia. Niniejszy artykuł analizuje debatę polityczną jako gatunek literacki poprzez analizę jej treści semantycznych, które odzwierciedlają stronę dziennikarską, narrację polityczną i dyskurs polityczny; ponadto, artykuł określa rolę i miejsce debaty politycznej z punktu widzenia budowy i kompozycji angielskiego dyskursu politycznego.

Stosownie do zamierzeń, przeprowadzona została zintegrowana analiza lingwistyczno-stylistyczna struktury współczesnej debaty politycznej prowadzonej w formie dyskursu online a także ukazana została częstotliwość występowania leksykalnych i semantycznych jednostek językowych w przestrzeni debaty politycznej.

Badania sprecyzowały nowe podejście do tworzenia przestrzeni semantycznej i penetrowały materiały dotyczące stylistyki języka debaty politycznej.

Słowa kluczowe: *debata polityczna, lingwistyka, cechy stylistyczne, eufemizm, jednostki frazeologiczne, grupa leksykalno-tematyczna.*

Introduction

At the current stage of linguistic science development, the investigation of political debate in reference to its lexico-semantic, syntactically-stylistic,

communicative-pragmatic peculiarities and functional potential remains one of the primary tendencies of linguistic research. The study of political debate in the modern international arena is considered to be of vital importance as it makes possible to analyze the evolution of political thinking as well as to find the ways of civilized political dialogue, which is extremely important for the modern world community.

Due to the intensive development of political, economic and intercultural relations, and the tendency of modern society to improve the efficiency and development of human activity in all areas, especially in the political and diplomatic spheres, more and more attention is paid to the effectiveness of verbal communication.

The study of political debate on different stages of social development is a very important and urgent task. Moreover, the issue of political debate becomes more relevant in the light of the intensification of international politics and cross cultural communication. Considering the political debate as a form of political communication, it can be pointed out that it is as old and ancient as political power itself. The study of political communication dates back to the time of Aristotle. The sages throughout the centuries from Machiavelli in Italy to Thomas Jefferson in America wrote about this kind of communication. Generally, political debate or polemics is defined as one of the most common forms of arguing about very controversial topics.

Thus, the objective of the article is directed towards theoretical and practical analysis of structural-semantic aspects of English political debate as a genre of political literature through disclosure of its semantic and structural specifics according to the hierarchy of hypertext language levels. The research is based on corpus of online newspaper texts, online versions of political speeches, remarks, comments and interviews by Barack Obama, the 44th US President during the period of his second presidential election campaign.

Structure and stylistic features of political debate: euphemisms

The way politicians approach delicate or unpleasant subjects is considered to be of vital importance. It is rather challenging in politics to appear polite and sensitive, attempting to win people's favour, and at the same time attack a political opponent. Political actors tend to avoid words or expressions that may have unpleasant associations in order not to give a negative impression to their audiences. To this end, they resort to euphemism,

the process whereby a distasteful concept is stripped of its most inappropriate or offensive overtones, providing thus a “safe” way to deal with certain embarrassing topics without being politically incorrect or breaking a social convention. Within the body of research on political discourse, euphemistic strategies have received considerable attention. (González, 1992; Fraser, 2009) To define the concept of euphemism in political discourse we follow the definition suggested by K. Allan and K. BurrIDGE, who identified euphemism as the use of mild and polite-sounding language to soften the potential face affront both to the speaker (for self-presentational purposes) and to the hearers (out of concern for their sensitivities). (Allan, 1991; BurrIDGE, 1996, p. 42-49) As an example of language used with a social purpose, political language is a breeding ground for euphemism and, in turn, euphemism stands out as a consubstantial element in political discourse. Political euphemism responds fundamentally to a social interdiction which has, as its main aim, to preserve the politicians’ image and, in this way, give a good impression of themselves and the political groups they represent. Moreover, euphemisms are distinguished at morphological, lexical and syntactic levels of language. In political debate, euphemisms are most frequently used at the lexical level of language through the use of such semantic ways of euphemisation as: periphrasis, metaphor, overstatement, metonymy, semantic ellipsis, borrowings, and terms. In the terms of syntactic methods of euphemisation in political discourse, we can find syntactic ellipsis and excessive complication of the phrase structure.

Thus, we can come to the conclusion that euphemisms in political discourse belong to the so-called tools for manipulation that are used with the aim to create and control the recipient’s outlook and ideology.

In order to study the use of euphemisms in the political discourse and analyze them as a verbal strategy in political language, we follow the classification widely used among researchers and suggested by V. Panin. (Panin, 2005, p. 78-79) Thus, having analyzed corpus materials the following groups of euphemisms have been revealed:

- 1) the group of euphemisms directly exclude racial and ethnic discrimination:
 - *It doesn’t matter whether you’re **black** or white or Hispanic or Asian or **Native American** or young or old or rich or poor, abled, **disabled**, gay or **straight**. (The New York Times...)*
 - *When you put on that uniform, it doesn’t matter if you’re **black** or white; **Asian** or **Latino**; conservative or liberal; rich or poor; gay or straight. (President Obama’s...)*

- 2) the group of euphemisms that contribute to avoidance of discrimination on the gender affiliation and euphemisms against discrimination based on health status and those that exclude age discrimination:
- *You'll hear the deep patriotism in the voice of a **military spouse** who's working the phones late at night to make sure that no one who fights for this country ever has to fight for a job or a roof over their head when they come home.*
 - *... eliminating health insurance for millions of poor and **elderly and disabled** Americans on Medicaid.*
 - *Millions of **seniors** who are seeing their prescription drug prices lower because it was the right thing to do. (Remarks by the President at Campaign Event, 2012)*
- 3) the group of euphemisms that are used in order to distract the attention of audience from the negative economic factors:
- *...no matter what you look like – whether you own a factory or **you work on the factory floor** – We all know families **making deep sacrifices** just to get by... that you can live a good, **solid, middle-class life**... We're fighting to rebuild an economy that restores security for the middle class and renews opportunity for folks trying **to get into the middle class**. (Remarks by the President on the American Jobs Act, 2011)*

In the speech addressed to the American people called the American Jobs Act, the President, focusing his attention on social inequality, avoids calling a spade – spade, so as not to offend those people and those families who can not belong to the middle-class society because of social and financial aspects. In the examples given, the function of euphemisms is to facilitate the perception of negative state of things.

- 4) the group of euphemisms aimed to expose wrong decisions and actions taken by the opponents:
- *The way he talks about them, it seems as if he thinks these are **a bunch of nameless government bureaucrats** that we need to cut back on. (Obama, 2017, p. 1263)*

Due to the end of the war, the withdrawal of troops from Iraq and the desire to emphasize the State's contribution to solving the conflict, a considerable number of euphemisms was recorded in the statements of the US President dedicated to armed conflicts and their consequences:

- 5) the group of euphemisms connected with armed conflicts and their consequences:
- *...he's visiting with **our brave men and women in uniform**, thanking them for their service. (Obama, 2015, p. 1483)*

The research has revealed the main reasons for using euphemisms in political discourse of Barack Obama among which we distinguish the necessity to keep to rules of the cultural and political correctness that exist in society as well as to avoid publicity and mass dissatisfactions. The motives for the usage of euphemisms in public speeches by Barack Obama vary, depending on the area of social political life, which makes possible to differentiate political euphemisms in special spheres of economics, domestic and foreign policy, armed conflicts and in the area of political correctness. Besides that, we have come to the conclusion that the majority of euphemisms in Obama's speeches are directed to highlight the multinational aspect of the citizens as well as their equal rights regardless of their income, social status, physical disability, colour of the skin and origin. Most of them play moderating and conspiratorial functions which convey those ideas that have become a social taboo and are too embarrassing to mention directly.

Typical methods of the use of idioms in political debate

The study of idioms' functioning and the ways of their usage in a political discourse was conducted through the analysis of phraseological units in B. Obama's pre-election speeches. The study of phraseology in general and idiomatic units in particular has always been the subject of a great number of linguistic researches, which is reflected in the works of such scholars as: Ch. Bally, O. Potebnya, V. Vinogradov, V. Telia, M. Shanskyy, A. Taranenko, D. Barannyk, V. Mokiyyenko, V. Kostomarov, B. Kovalenko, and others. Despite a great number of researches on this topic, a great ambiguity of the terms phraseology and idioms which are also widely accepted, is observed. Opinions differ as to how this part of the vocabulary should be defined, classified, described and analyzed, and even the terminology the researchers keep to has become the issue for debate. A.V. Kunin lays the stress on the structural separateness of the elements in a phraseological unit, on the change of meaning in the whole as compared with its elements taken separately and on a certain minimum stability. (Kunin, 1996) In English and American linguistics, the situation is very different. No special branch of study exists, and the term "phraseology" is a stylistic one. The word "idiom" is more polysemantic. The English use it to denote a mode of expression peculiar to a language, without differentiating between the grammatical and lexical levels. It may also mean a group of words whose meaning is difficult or impossible to understand while translating each word separately.

To analyze the structural peculiarities of idioms in the research we follow the classification by A. V. Kunin, who strongly believes that phraseology must be developed as an independent linguistic science and not as a part of lexicology, and who introduced classification of phraseological units based on the functions the units fulfill in speech. They may be nominating, interjectional, communicative or nominating-communicative. Further classification into subclasses depends on whether the units are changeable more generally, on the interdependence between the meaning of the elements and the meaning of the set expression. The researcher suggests formal and functional classification based on the fact that a set expression functioning in speech is in distribution similar to definite classes of words. According to this approach, set expressions are distinguished as nominal phrases, verbal and adjectival phrases, adverbial and prepositional phrases, conjunctive and interjectional phrases, as well.

In the research conducted, we focused our attention and have analyzed two types of structural units: phraseological units with the structure of a phrase and those with the structure of a sentence. The analysis of corpus materials has led us to the conclusion that most numerous class of phraseological units with the structure of a phrase is a verbal word combination treated as idiomatic expressions functionally correlated with the verb. Having classified idiomatic expressions in political speeches, we are able to identify the following most commonly used structural models:

- **Noun + Verb** – *to leave a shore; to turn a page; to hit the bottom; to ship jobs; to fill the shoes; to need a bridge;*
- **Verb + Article + Noun** – *to have a huge stake; to play a long game; to be a fiscal hawk;*
- **Verb + Preposition + Noun** – *to lay out a blueprint; to lay off teachers; to play by the rules; to dig into a pocket; cut through the maze; to be on the ropes; to wind down the war; to be on the hook; to dig into a pocket;*
- **Verb + Noun + Preposition** – *to give a leg up;*
- **Verb + Noun + and + Noun** – *to get pomp and circumstances;*
- **Verb + Preposition + (Article) + Noun** – *to take on illegal immigration; to cry over spilled milk; to cut out the middle man;*
- **Verb + Preposition + one's + Noun** – *to look over one's shoulder; to roll up one's sleeve;*
- **Verb + Noun + Preposition + Noun** – *to put boots on the border; to pour education into an ear;*

Another group of structural models represents the nominal combinations where the main word that conveys the meaning of the expression is a noun:

- **Adjective + Noun** – *red tape; huge stake;*
- **Noun + and + Noun** – *pomp and circumstances;*
- **Noun + Preposition + Noun** – *a house of cards;*
- **Adjective + Noun + Noun** – *blue chip company; a blue-collar worker;*

It should be mentioned that the semiological approach that involves a detailed study of idiomatic expressions and their denotative meaning and connection with the situation of communication can be the methodological basis for the study of structural and semantic characteristics of idiomatic expressions in political debate. According to this approach, we distinguish the following groups of expressions:

- the group, indicating the financial difficulties in the country: *to leave smb holding a bag; to dig into a pocket; to make ends meet; to be wiped out;*
- the group, indicating problems related to employment and unemployment issues: *to ship jobs overseas; to lay off teachers;*
- the group, indicating the problems connected with illegal crossing of border and migration: *to take on illegal immigration; to put more boots on the border;*
- the group, indicating a decline in the level of economic development: *to hit bottom; to back down; to be on the ropes; to tear down regulations;*
- the group, indicating fair rules of the political game: *a fair play; to play the same set of rules; to play the long game; to play by the rules;*
- the group, indicating the positive aspects of political and economic development of the state: *to fire on all cylinders; to feel fired up; to right the ship; to pan out; to become the next Steve Jobs;*

In the corpus of the material analyzed, idiomatic expressions with a negative connotation prevail. To some extent, such tendency can be explained by the very subject of the issues taking the first position in the election programs of politicians, since such issues are usually dedicated to economic problems, problems of social security of the population, unemployment and crisis in different spheres of social and economic life.

Thus, we can come to the conclusion that idiomatic units possess all essential features and characteristics required for political discourse and mass media; they are vivid, accurate and expressive.

Content analysis and description of lexical-thematic groups

Barack Obama's rhetoric is characterized by clarity and accessibility of information to the audience, which is one of the main means of achieving success.

As the researchers point out, the political discourse of the politician has a polycode structure, and it is proved by a significant number of semiotic systems which transmit information to the recipient. One of the tasks to deal with is to describe and analyze the lexical-thematic groups in the political discourse of US President Barack Obama through the classification of lexical units accordingly to thematic groups, and through the analysis of lexical means used by the politician.

As a result of the study and the analysis of lexical content of political discourse, all lexical units can be divided into six vocabulary categories: political and economic vocabulary, social, scientific and technical vocabulary, military vocabulary and vocabulary to describe ways of developing and reforming education. Such approach is considered to be effective due to its specific character and wide thematical range of B. Obama's discourse which aims to cover all areas of development and functioning of the state, from the political sphere to the technical one. The category of political vocabulary is found to be the largest of the total analyzed and is divided into the following groups:

- general political vocabulary to describe political positions and participants of political process: *United States Senator, governor, congresswoman, the White House, the Supreme Court, the Congress, Republicans, Democrats, U.S. Senate candidate, congressional candidates, opponent in the election, government bureaucrats, conservatives, liberals, CEO Chief executive officer, the mayor of Washington, D.C., Secretary of Education, Commander-in-Chief, State Treasurer, Attorney General, campaign co-chairs*;
- vocabulary to describe official visits, international organizations, governmental documents and projects, the names of funds and government agencies: *delegation, MCC Mortgage credit certificate, OPIC Overseas Private Investment Corporation, a free trade agreement, Department of Education, Department of Agriculture, the Constitution, HRC Human Rights Campaign, DOMA Defence of Marriage Act, the American Jobs Act*;
- vocabulary to describe government activity: *to strengthen trade relations, to block the bill, to lead with diplomacy, strong bilateral relationship productive bilateral talks, pass a bill*.

The second lexical-thematic group covers economic terminology. Within this group, we identified the following subgroups:

- lexical units related to the material welfare of voters and the state: *effective free market system, to pay off, to measure prosperity, to cut taxes, the highest job growth, falling unemployment rate, to create jobs, to lower deficit, to end tax breaks, to cut oil imports, to control own energy, to increase oil production, a good wage, low tax rates, an escape from poverty, to save the job*;
- lexical units which indicate material anti-values: *high tax rates, reckless bets with folks' money, higher fees for gas, to collapse, to go bankrupt, unemployment, economic crisis, to work an extra shift, burdened by debt*;
- lexical units to describe economic concepts and realities: *to invest, corporate balance sheets, quarterly profit reports, mortgage lenders, financial institutions, outsource jobs, small business owners, taxpayers, student loans, sustainable economy, to sell goods and services*.

The third group combines social vocabulary and is divided it into the following subgroups:

- nomination to denote social classes and groups and their representatives: *middle class, millionaires, billionaires, the wealthiest families, minorities, second-class citizens*;
- nomination to describe processes of organization or disorganization of social life: *reforms, health insurance, Social Security, campaign, rule of law, fair and free elections, reelection, national competition, high standards, deep patriotism, weakened up by inequality, threatened by the destructive power, a retirement system, to stop discrimination*;
- nomination related to state-territorial structure, characters and symbols of Ukraine: *sovereign and democratic country, the core of the nation, the model of democracy, to pledge to the flag*;
- nomination to describe the ways of health care system reform: *insurance company, health care, health care law, Medicare*.

The fourth lexical-thematic group distinguished here, includes lexical units describing the achievements of science and technology and is divided as follows:

- vocabulary to describe the functioning aspects of the Internet: *Barack Obama.com/plans, to register online, go to the website GottaRegister.com, Facebook, Twitter, to launch a website, put up an online database*;
- vocabulary to describe innovations, discoveries and achievements in various fields of science: *research, medical breakthroughs, new technologies, fuel-efficient cars, fuel-efficiency standards, long-lasting batteries*

and wind turbines and solar panels, to make investments in science and technology, technological ascendancy.

The fifth group includes lexical units denoting strategies and tactics of military operations, military personnel involved in these operations, and the actions of government in this direction:

- *defense, security, Navy SEALs, NATO, ISAF, casualties, to end the war, terrorists, veterans, to serve, to fight for the country, to bring home troops, military spouse, the strongest military on earth, to re-enlist.*

Finally, in the sixth lexical-thematic group we combined those lexical units that aim to describe ways of development and reform of education:

- *to educate, to recruit teachers, tuition, lifelong learning, classroom matters, school supplies, a bunch of great teachers, crowded classrooms, canceled programs for preschoolers, class size, to hire teachers, to start the career, best-educated, highly skilled, educators, to cut investment in education, Head Start, grants and loans for college students, education system, to raise standards for teaching, to get diplomas, the cost of college, to double grant aid to students, to rise cost of tuition, have a perfect score, upgrade the skills, public school, private school, charter school, extra-curricular activities, PTA (Parent Teacher Association) meeting.*

Thus, the analysis shows that the category of political vocabulary and the category indicating the ways of development and reforming education prevail and can be rated as those that prevail in B. Obama's speeches as the politician pays a great attention to the issues of education as well as the issues related to economic development. The research shows that B. Obama employs a large number of political terminology and he also uses many social and public terms, besides that his speeches comprise scientific vocabulary and vocabulary, describing the functioning of the Internet, which indicates the versatility of his political activities.

Conclusions

The analysis of the linguistic and stylistic means carried out on the functional and structural-semantic ground assumes that these means are not studied as ordinary forms and structures but as bearers of valuable information defined by the author, as bearers of certain ideas, relations, and communicative intentions. In the course of the analysis, it became clear that the orator uses various stylistic devices to produce a deep impression on the audien-

ce. Due to them, Obama concentrates people's attention on the necessary semantic elements and thus makes up the rhythmical trajectory of speech. The latter makes the speech easy to understand and interpret. As a result, the politician can easily put the accent on his vision of the political situation and persuades the electorate to vote for him.

The study has clarified new ways of arranging semantic space based on pragmatic factors of speech situation and explored stylistic resources of language in the political debate. As a result of investigation, the communicative and pragmatic peculiarities of lexical and stylistic figures of political speeches have been exposed.

Thus, the political debate is a complex of mental processes both individual and collective. Communicative-pragmatic functions are aimed at sending messages and cover a wide range of pragmatic tasks. The politicians introduce facts, events or figures in order to be able to express their own attitude to the described events, evaluate them and motivate the recipients to come up with conclusions. The information received modifies people's consciousness and encourages them to take certain actions.

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**Pictogram and Ideograms
as the Main Means of Multimodality
(on the basis of the Australian newspapers)**

**Piktogramy oraz ideogramy
jako główne przekąźniki multimodalności
(na przykładzie prasy australijskiej)**

Abstract

In modern Australian newspaper advertisements there is a wide range of non-verbal means of communication though the most frequent and popular ones are ideograms and pictograms. Other non-verbal means of modern mass-media communication are unusual letter writing and their capitalization, substitution of letters with pictograms, images or ideograms, intentional spelling mistakes, unusual word building patterns, changes of sizes of letters, variations of fonts, texts layout and colours. Pictograms and ideograms can be independent transmitters of information but in the majority of cases they correlate with verbal signs. Like other signs they perform such functions as attractive, informative, expressive and esthetic. Copywriters and advertisers appeal to human emotions as much as possible keeping in mind the fact that when the information is not just seen but sensed

and felt it will be remembered for a longer time. Non-verbal means in combination with verbal elements convey a certain pragmatic meaning and perform three main functions: (1) intensification of the meaning of verbal signs; (2) substitution of a verbal sign that has been omitted (this can happen on all language levels: phonetic, morphological, lexical); (3) addition of extra information to the verbal message, though, sometimes, it can be of an antonymic character. Besides that, they perform such specific functions as: duplication, specification, substitution of the whole verbal part or its section. According to the territorial parameter, non-verbal means of communication can be divided into two groups: *international* and *national*. Another distinctive feature of means of non-verbal communication is their ambiguity because decoding of the real semantics is defined by the context, linguistic distribution, and background cultural knowledge. Despite the heterogeneity of the constituent elements, multimodal advertisements are homogeneous units of information that are aimed at attracting customers' attention, making them think and buy the promoted products or services or modify their behaviour.

Key words: *multimodal advertisements, Australian newspapers, pictograms and ideograms, verbal and non-verbal signs, functions.*

Abstrakt

We współczesnych australijskich ogłoszeniach prasowych można spotkać wiele niewerbalnych komunikatów, z których najpopularniejsze są te w formie ideogramów i piktogramów. Inne niewerbalne sposoby komunikowania stosowane w środkach masowego przekazu to nietypowy sposób pisania liter, zwłaszcza wielkich, zastępowanie liter piktogramami, wizerunki lub ideogramy, zamierzone błędy ortograficzne, nietypowy szyk wyrazów, zmienna wielkość liter, różnorodność w kroju czcionek, układzie tekstu i barw. Piktogramy i ideogramy mogą być same w sobie przekazywanymi informacjami ale w większości przypadków korelują one jednak ze znakami werbalnymi. Tak jak inne znaki, odgrywają one takie funkcje jak, emotywna, informatywna, ekspresyjna czy estetyczna. Autorzy tekstów i ogłoszeniodawcy chcą poruszyć ludzkie emocje tak dalece jak to możliwe mając na względzie to, że kiedy przekaz jest akurat niewidoczny a jedynie odbierany zmysłami będzie on zapamiętany na dłużej. Niewerbalne środki przekazu w połączeniu z elementami werbalnymi tworzą swoiste znaczenie pragmatyczne i spełniają trzy zasadnicze funkcje: 1) znaczeniowej intensyfikacji znaków werbalnych, 2) zastępowania znaku werbalnego, który został celowo pominięty (to może mieć miejsce na wszystkich poziomach językowych: fonetycznym, morfologicznym, leksykalnym), 3) dodawania informacji do przekazu werbalnego chociaż, czasami, może on mieć charakter antonimiczny. Ponadto, niewerbalne środki przekazu w połączeniu z werbalnymi spełniają takie specyficzne funkcje jak: wzmocnia-

nie znaczenia, uszczegółowienie, zastępowanie całej kwestii werbalnej lub jej części. Według parametrów terytorialnych, niewerbalne środki przekazu mogą być podzielone na dwie grupy: *międzynarodową* oraz *narodową*. Inną cechą dystynktywną niewerbalnych środków przekazu jest brak klarowności ponieważ proces kodowania semantycznego jest określony przez kontekst, aranżację języka, kompetencję kulturową. Mimo różnorodności elementów składowych, ogłoszenia multimodalne są jednorodnymi jednostkami przekazu, których celem jest zintensyfikowanie skupienia uwagi klientów i spowodowanie, aby zdecydowali się na kupno promowanych produktów lub usług względnie – zmienili swój stosunek do nich.

Słowa kluczowe: *ogłoszenia multimodalne, prasa australijska, piktogramy i ideogramy, znaki werbalne i niewerbalne, funkcje.*

The origin of pictograms and ideograms has a very long history and is closely connected with the invention of writing. Therefore, the names “pictogram” and “pictography” come from Latin *pictus* – painted and Greek *grapho* – writing, *gramma* – letter, line; so a «pictogram» is a graphic sign that depicts a life situation or an event with the help of a picture. (Yermolenko, 2005, p. 125) The term “ideogram” (from Greek *idea* – idea i *gramma* – letter, line) is a written sign (of an ideographic type) that depicts the whole word or a root of a word, and does that in a form of a scheme picture or a symbol of a concept. (Selivanova, 2006, p. 172) In other words, an ideogram is a graphic sign which is a symbol, a sign of a concept that communicates the meaning but is not connected with the sound form.

According to Collins Dictionary, a pictogram is a simple drawing that represents something. (*Collins English Dictionary...*, 2011) Such definition is ambiguous as a lot of questions arise from it: like how a pictogram must be created, under what conditions it can be interpreted or even what is the actual difference between a pictogram and an ideogram.

It is worth mentioning that R. Abdullah has singled out not only pictograms but other forms of pictorial signs such as iconograms, cartograms, diagrams, logograms, typograms, phonograms and ideograms. (Abdullah, 2006, p. 7)

So, pictograms and ideograms are elements of coding systems that are used to transfer and communicate information. They have all characteristics of signs, that is why their structural, semantic, syntactic and pragmatic peculiarities are viewed from the aspect of formal, cognitive and communicative semiotics, as well as applied semiotics. We understand applied semiotics as a branch of linguistics that studies the sign language, the usage of signs in

the field of zoosemiotics, social semiotics, in the sphere of marketing, and creation of advertisements. (Andreichuk, 2011, p. 45) Due to the fact that pictograms and ideograms function in combination with language signs, it is logical to look at them from the linguo-semiotic point of view and analyze the correlation of natural language and other communicative sign systems.

If we talk about modern usage of ideograms and pictograms, more and more often they can be found in advertisements. More precisely, in the multimodal texts of mass-media advertisements, where a combination of verbal and non-verbal signs (pictograms and ideograms) are widely used. Copywriters and advertisers apply them in order to achieve the final aim – to sell a product or to encourage a consumer to perform a certain action or change his/her point of view.

Modern studies show that, besides pictograms, ideograms, and pictures, such nonverbal means as unusual letter writing and their capitalization, substitution of letters with pictograms or ideograms, intentional spelling mistakes, unusual word building patterns, changes of sizes of letters, variations of fonts, texts layout and colours are widely used in newspaper multimodal advertisements.

While studying multimodal (multicodal) advertisements, a big attention is to be paid to their visual part as visual signs make a deep emotional influence on the readers/consumers/customers. A famous American scholar L. Ries compared visualized multimodal advertisements to a visual hammer that drives the intended information into the customers' brains. (Ries, 2014)

Copywriters and advertisers appeal to human emotions as much as possible keeping in mind the fact that when the information is not just seen but sensed and felt, it will be remembered for a longer period of time. Alerted emotions can be compared to glue that sticks in our memory and makes us think about an advertisement again and again. (Ries, 2014)

According to the Ukrainian scholar T. Semeniuk, in the majority of cases non-verbal means are self-explanatory. (Semeniuk, 2017) Different graphical elements, that are parts of multimodal advertisements, make the forms of presenting the information more vivid and visualized, which, in their turn, make the comprehension easier, quicker, more memorable and persuasive.

The American scholar – P. Messaris, using Ch. Pearse's classification of signs, denotes that visual persuasion is possible because of certain functions of a non-verbal visual sign (image). First of all, he meant such features as iconicity, index and syntax implication. (Messaris, 1996) Iconicity gives copywriters an access to a wide range of emotional reactions of their target audience as well as possibilities to influence it. The index becomes an important component of the visual persuasion, as a graphic image can be

a documented proof of the authenticity of an advertised product, service or idea. A syntax implication of images lies in the non-verbal ambiguity, which forces the target audience to think and analyze the message, to correlate visual, non-verbal means/elements with the verbal ones and to create a unified picture. Such implied engagement makes the target customers feel that they actively participate in the perception and processing of the multimodal message, as well as in the decision making processes.

Another distinctive feature of means of non-verbal communication is their ambiguity because decoding of the real semantics is defined by the context, linguistic distribution, and background cultural knowledge. According to O. Anisimova, non-verbal means of communication attract the attention of the participants of the speech act, but again, in order to decode it, one must decipher and interpret it. (Anisimova, 2003, p. 8) L. Minaeva stresses that, if a lot of non-verbal signs are easy to decode, there are a lot of examples when visual elements of mass-media texts cannot be decoded unless the addressee belongs to the same culture. (Minaeva, 2002) Moreover, many verbal signs used in the newspaper advertisements are culturally marked and require additional cultural knowledge for their comprehension. The most complicated situations appear in the written communication when there are no direct contacts with copywriters or advertisers and their target customers. It means that it is not always clear what the intended primary meaning was and what exactly the copywriters wanted to convey. An example of such ambiguity can be seen in the following picture:



Picture 1: The Currier Mail, 25 Jan, 2013

The headline of this advertisement is Cellarbrations. *Cellarbrations* – is a chain of liquor stores in Australia. The name is a telescopic composite, that was created as a result of blending of two lexems – cellar + celebrations = cellarbrations. In the structure of the new word we can also see a substitution of letter “o” with the pictogram of gas bubbles (fizzy drink). Alcohol

and fizzy drinkst are attributive parts of all Australian celebrations and pastimes. It is important to point out that copywriters of Australian printed advertisements use a lot of red colour which, on the psychological level, has a strong manipulative impact and can evoke quick reactions and actions in the recipients. A special attention must be paid to the verbal part of this advertisements – a sentence that is placed on the red pin: *Grab a tinnie for your tinnie*. The interpretation of the meaning of this sentence can cause difficulties to non-native speakers or strangers because they may be unaware that “*Tinnie*” – is an Australian slang word which is used to refer to a boat and/or to name a can of beer. In such a way, Australians are encouraged to buy beer and to take it with them on a boat and spend their free time in a very typical for the local population manner.

In multimodal advertisements, non-verbal signs correlate with the verbal parts and perform three universal functions: (1) intensification of the meaning of verbal signs; (2) substitution of a verbal sign that has been omitted (this can happen on all language levels: phonetic, morphological, lexical); (3) addition of extra information to the verbal message, though, sometimes, it can be of an anthonymic character.

Non-verbal signs perform universal as well as specific functions. The Ukrainian scholar T. Semeniuk defines three types of correlation between verbal and non-verbal elements of the advertisements:

- (a) dublication,
- (b) addition,
- (c) disparity.

Dublication takes place when a non-verbal means of communication completely reflects the verbal information of verbal signs, depicting the same ideas and concepts. The following advertisement can serve as an example of dublication.



Picture 2: The Courier Mail, 29-30 Jun, 2013

The advertisement is about a fund-raising event. The message “make every step count” has been created with the help of the pictures of foot

prints and separate words that are written on them. So, the verbal phrase conveys the general information about the event that gets strengthened by the visual non-verbal sign. At the same time, other non-verbal means – colour, location of images, design – emphasise the meaning of the verbal message making it bright and memorable.

Addition means that the interpretation and cognition of a visual element depends upon the verbal explanation that accompanies it. Compare the below example of an advertisement from the Australian regional newspaper *The Cairns Weekend Post*.



Picture 3: The Cairns Weekend Post, 22-23 Jun, 2013

In the following advertisement one can see a road sign, where the names of possible professions/careers are used instead of the names of streets or cities. It is rather symbolic as young people, when choosing their career, find themselves at the life cross-roads, similar to the real city road signs. The actual verbal part is an addition to the image, and it gives more details and clarifications. It is important to point out that addition is the most typical form of correlation used in the printed advertisements in the Australian newspapers.

Disparity can be found when the verbal and non-verbal signs do not have direct points of contact, and the correlation can be created on the associative basis. For example, the advertisement from *the Sydney Morning Herald* explains the point:



Picture 4: The Sydney Morning Herald, 4 Jan, 2017

This example shows us the ways of attracting attention by using the opposites. The advertised verbal message and non-verbal visual elements do

not directly cooperate with each other. By saying this, we mean that a picture of an older gentleman looking pretty shabby and overweight does not really bring to mind the notions of “quality” or “master foodmakers”. As a result, we can say that the phrase “*only Fred supplies the best*” is the one that conveys the actual meaning of the message, while the image of Fred is just to strike the customers or attract their attention.

It is important to bring out attention to the fact that non-verbal elements perform the *function of replacement/substitution*. This means that they can substitute verbal units (a letter, letter clusters, morphemes, lexemes etc.) on different language levels. The most typical substitution that was found by us in the Australian printed newspapers is the one of letter “o”.

Below, there are a couple of examples that demonstrate how pictograms and ideograms substitute a verbal sign – letter – and also add more information about the concepts which the copywriters wanted to convey.



Picture 5: The Cairns Weekend Post, 28 Jan, 2012



Picture 6: The Herald Sun, 26 Jan, 2013



Picture 7: The Cairns Weekend Post, 22-23 Jun, 2013

Picture 8: The Cairns Weekend Post, 22-23 Jun, 2013

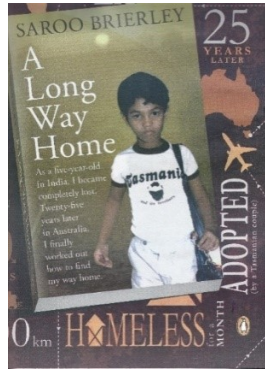
Picture 9: The Saturday Age, 26 Jun, 2013

Picture 10: The Cairns Post, 5 Jul, 2013

So, we can clearly see the most typical substitutions of letter “O” with the corresponding and contextually defined ideograms and pictograms. The following pictorial replacements were found: sun – in the solar energy advertisement; a tennis ball – in the newspaper section, devoted to sport news; zero – in case of no interest rate when buying a car; timer – to attract attention that time is running out and customers should hurry up if they want to buy a car at a good deal; eyes – to attract attention to the given

advertisement; and the last one – a ferriswheel – to talk and notify about a fair that is going to take place in Cairns, Australia. It is important to mention that throughout our research while analyzing eight newspapers, it was found that a sports ball is the most typical pictogram that substitutes letter “O”. In most cases these are tennis, rugby or golf balls.

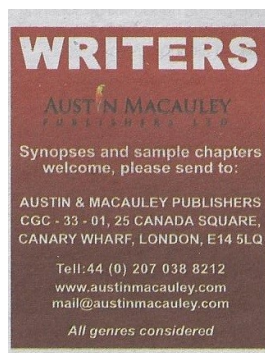
Another very interesting substitution of letter “O” can be found in the following example, taken from the newspaper *The Age*.



Picture 11: The Saturday Age, 29 Jun, 2013

One can see a word “homeless” where letter “O” is substituted by a pictogram of a house that is crossed out. This little pictogram conveys the meaning of the whole word and is very self-explanatory. Besides that, a very interesting pictograms of Australia, a plane and plane routes that start in Tasmania, give a short insight into the story of a little boy who was lost and managed to find his real parent, 25 years after being adopted.

Another typical example of a letter substitution is the one for letter “T”.



Picture 12: The Telegraph, 23-29 Jun, 2013



Picture 13: The Cairns Post, 26 Nov, 2012

In the first example, when the goal of advertisers is to promote their printing services and find the potential authors, the letter “I” is substituted with a pictogram of a bird. In the second example letter “I” is substituted with the ordinal numeral “1” which performs two functions – substitutes letter “I” in the word *choice* and the word *first*. In such a way copywriters emphasise the premium quality their store and visualize the information making it more precise and squeezed. The text layout is also rather unusual as its second part – *WE BEAT everyone’s liquor prices* – is located on the pictogram of a sports bat. The copywriters capitalized the key words WE BEAT and wrote them in white colour against the black background. The second part of the sentence – everyone’s prices – is written in very small letters which may mean that it is not very important. At the same time the chosen combination of such colours as yellow and black stands for aggression (these are the colours of a wasp) and conveys the meaning of aggression and readiness to fight. The last part of the advertisement – *Even if they’re crazy enough to undercut us, we’ll beat them again* – is written in small letters but on the red plate which underlines power and action.

According to the territorial parameter, non-verbal means of communication can be divided into two groups: *international* and *national*. The majority of our examples have national features but sometimes international visual signs are found. Among them there is the sign that is used to describe American money – \$, a pictogram of a heart – ♡, images of the sun and a ball, international smiley faces and emoticons, and an ideogram & etc.

For example, there were found a couple of advertisements that had a photo of a pig on them, or better to say – a piggy bank. A concept which is understandable and clear to all the readers.

In many cultures, including Australian, a pictogram of a pig means savings. It very clearly depicts and conveys the main idea of the advertisement – to encourage the consumers to save money by buying goods that are on special, or we can also say that it very effectively manipulates their consciousness and encourages them to act, that is to start buying goods.



Picture 14: The Herald Sun, 26 Jan, 2013

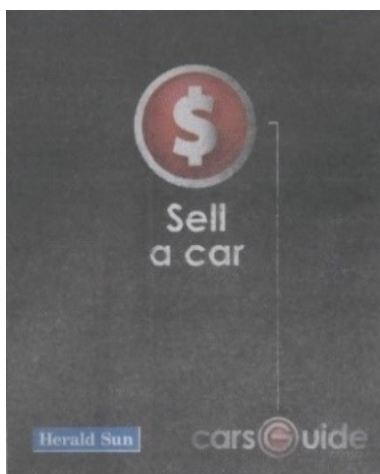


Picture 15: The Cairns Post, 5 Jul, 2013

The next examples contain ideograms that stand for the international monetary items.



Picture 16: The Weekend Cairns Post, 28 Feb, 2012



Picture 17: The Herald Sun, 26 Jan, 2013

By using the symbols that depict the US dollar or euro, copywriters make their messages clear and easy to comprehend. In the given examples non-verbal means perform the functions of substitution, intensification, and attraction, making the messages more clear, attractive and memorable. Such examples make it possible to conclude that internalisation of pictograms and ideograms and their cross-cultural convention makes them understandable and clear to consumers both on local and on international levels.

To conclude, we may say that non-verbal means, mainly ideograms and pictograms, became an inalienable part of modern multimodal advertisements in the Australian printed newspapers. With their help, newspapers advertisements become more appealing, easy to read, comprehend, and remember. As visual means they appeal to human senses and, on the subconscious level, stimulate customers to pay attention to the advertised product, to think about it and to act.

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**The Communicative Language Teaching approach
in teaching English conversation.
Theoretical background and practice**

**Podejście komunikacyjne w nauczaniu konwersacji
w języku angielskim. Teoria i praktyka**

Abstract

The main goal of this paper is to indicate the significance of the Communicative Language Teaching (CLT) approach in teaching English conversation. The first issue presented in this article is to explain the essence of conversation. Afterward, there is a demonstration of major distinctive features assigned to the CLT approach, functions of language and four categories of communicative competence. The following point is dedicated to learner's and teacher's roles determined by the CLT approach and a brief mention concerning three types of materials which enhance communicative capacity. Furthermore, there is a presentation and description of principles used for designing techniques including a checklist of microskills. On top of that, various categories and types of oral production are put forward. The last part of the article contains examples of exercises.

Key words: *conversation, CLT, functions of language, materials, techniques, microskills, categories and types of oral production.*

Abstrakt

Głównym celem tego artykułu jest wskazanie znaczenia podejścia komunikacyjnego CLT w nauczaniu konwersacji w języku angielskim. Pierwszą kwestią przedstawioną w tym artykule jest wyjaśnienie pojęcia konwersacji oraz ukazanie jej kwintesencji. Następnie zaprezentowano główne założenia przypisane podejściu komunikacyjnemu CLT, funkcje językowe i cztery kategorie kompetencji komunikacyjnej. Kolejny punkt stanowi opis ról przypisanych uczniom i nauczycielom w obrębie podejścia komunikacyjnego CLT oraz krótka wzmianka o trzech rodzajach materiałów, które zwiększają zdolności komunikacyjne. Ponadto, zaprezentowano i opisano zasady stosowane w projektowaniu technik, w tym listę mikro umiejętności. W dalszej części artykułu zaproponowane zostały różne kategorie i rodzaje aktywności werbalnej. Ostatnia część artykułu zawiera przykłady ćwiczeń.

Słowa kluczowe: *konwersacja, CLT, funkcje językowe, materiały, techniki, mikro umiejętności, kategorie i rodzaje aktywności werbalnej.*

Introduction

Conversation is commonly recognized as any spoken exchange of thoughts and ideas, pieces of information or feelings, which involves at least two interlocutors. In other words, this the moment when participants in a conversation can talk, listen to each other, share speaking time, react, respond or attend to each other. Naturally, conversation dies when these components are neglected. Therefore, simultaneous talking without any interruptions performed by two or more partakers ends in chaos. Then, there is no chance for coherent, comprehensible, audible and clear flow of information. And yet, the “purposes of conversation include the creation and maintenance of social relationships such as friendship; the negotiation of status and social roles, as well as deciding and carrying out joint actions”. (Nolasco, Arthur, 1987, p. 5) To obtain these goals Nolasco and Arthur (Nolasco, Arthur, 1987, p. 7) suggest implementation of the following rules of conversation:

1. One person should speak at a time.
2. The speakers should change.
3. The length of any contribution should be varied.
4. Techniques that allow the other party or parties to speak should be implemented.
5. The content or the amount of what you want to say should not be specified in advance.

It may be clearly affirmed that by acting in accordance with the mentioned rules, interlocutors smoothly cooperate during the course of conversation.

Moreover, Grice (Nolasco, Arthur, 1987, p. 7) describes four maxims which support development of cooperative behaviour. The first is called *the maxim of quality*, which states that what is said must be true and should be supported by an adequate piece of evidence. The second is *the maxim of quantity* where speaker's contribution should be as informative as required. The third is *the maxim of relation* which suggests relevant and timely contribution. Finally, the fourth principle is called *the maxim of manner* which articulates avoidance of obscurity and ambiguity.

Apart from the four maxims described above, there should be at least a short mention included about how language is used in social contexts. In this case the best example might be two-part exchange called *adjacency pairs*, which are considered the smallest chunks of conversation. This stimulus-response move consists of two utterances produced by two speakers where the second sentence is related to the first one. Adjacent exchanges may express the following content: question-answer, complaint-denial, offer-acceptance, compliment-rejection or greeting-greeting.

Besides, social context also refers to male and female differences in conversation. Nolasco and Arthur (Nolasco, Arthur, 1987, p. 11) claim that women display more interest in personal matters and they are better listeners. Moreover, women appear to be more helpful to the person they are speaking in developing a topic by asking additional questions and making encouraging remarks. Regarding men, they are more reluctant to reveal personal information and prefer to talk about more general, outside matters, e.g. politics, cars, hobbies or sport.

Naturally, the most significant issue present in the process of teaching English conversation is the communicative approach called Communicative Language Teaching (CLT). It defines learner's and teacher's roles, materials used in communicative language teaching, principles for designing speaking techniques, types of communicative activities as well as examples of exercises.

Communicative Language Teaching

As it has already been mentioned, the communicative approach (CLT) aids development of communicative competence. Finocchiaro and Brumfit (Richards, Rodgers, 2001, pp. 156-157) enumerate a number of major distinctive features of Communicative Language Teaching, and these are:

1. Meaning is paramount.
2. Dialogues, if used, center around communicative functions and are not memorized.
3. Contextualization is a basic premise.
4. Language learning is learning to communicate.
5. Effective communication is sought.
6. Drilling may occur, but peripherally.
7. Comprehensible pronunciation is sought.
8. Any device that helps the learners is accepted – varying according to their age, interest, etc.
9. Attempts to communicate may be encouraged from the very beginning.
10. Judicious use of native language is accepted where feasible.
11. Translation may be used where students need or benefit from it.
12. Reading and writing can start from the first day, if desired.
13. The target linguistic system will be learned best through the process of struggling to communicate.
14. Communicative competence is the desired goal (i.e., the ability to use the linguistic system effectively and appropriately).
15. Linguistic variation is a central concept in materials and methodology.
16. Sequencing is determined by any consideration of content, function, or meaning that maintains interest.
17. Teachers help learners in any way that motivates them to work with the language.
18. Language is created by the individual, often through trial and error.
19. Fluency and acceptable language is the primary goal: Accuracy is judged not in the abstract but in context.
20. Students are expected to interact with other people, either in the flesh, through pair and group work, or in their writings.
21. The teacher cannot know exactly what language the students will use.
22. Intrinsic motivation will spring from an interest in what is being communicated by the language.

Another linguist, Halliday (Richards, Rodgers, 2001, p. 160) being in favour of the CLT approach, demonstrates seven basic functions of language:

1. *Instrumental*, where language is used to express people's needs or to get things done.
2. *Regulatory*, where language is used to control others' behaviour, to tell them what to do.
3. *Interactional*, where language is used to interact and form relationship with others.

4. *Personal*, where language is used to express personal opinions or feelings.
5. *Heuristic*, where language is used as a tool to discover, gain knowledge about the world.
6. *Imaginative*, where language is used to create imaginary world.
7. *Representational*, where language is used to communicate information.

Canale and Swain (Richards, Rodgers, 2001, p. 160), after carrying out the analysis of communicative competence, have distinguished four dimensions: grammatical competence, sociolinguistic competence, discourse competence, and strategic competence. *Grammatical competence* is called linguistic competence and refers to grammatical and lexical capability. *Sociolinguistic competence*, as the name suggests, covers social context in which conversation takes place, relationships, shared information, and the purpose for the interaction. *Discourse competence*, where individual elements of a message are interpreted in terms of their interrelation and the way meaning is displayed in terms of the entire discourse. *Strategic competence* refers to conversational strategies which help interlocutors to accomplish oral communicative purposes. Brown (Richards, Rodgers, 2001, p. 276) suggests the use of the following:

- a) asking for clarification (*What?*)
- b) asking someone to repeat something (*Huh? Excuse me?*)
- c) using filters (*Uh, I mean, Well*) in order to gain time to process
- d) using conversation maintenance cues (*Uh huh, Right, Yeah, Okay, Hm*)
- e) getting someone's attention (*Hey, Say, So*)
- f) using paraphrases for structures one can't produce
- g) appealing for assistance from the interlocutor (to get a word or phrase, for example)
- h) using formulaic expressions (at the survival stage) (*How much does _____ cost?, How do you get to the _____?*)
- i) using mime and nonverbal expressions to convey meaning.

Furthermore, Harmer (Harmer, 2007, p. 344) adds the so called all-purpose phrase, which helps speakers to get round the problem if they do not know the exact word (*You know, it's a what-d'you-call-it*). Basturkmen (Harmer, 2007, p. 344) introduces multifunctional question forms, which serve both as suggestion and criticism (*Did you consider the possibility of an alliance with other organisations?*) and the piling-up of questions, which are an inseparable series of questions (*How much technology?, Who does it?, Is it the suppliers?*). Finally, Dörnyei and Thurrell (Harmer, 2007, p. 344) offer conversational openings (*How are you?*), interrupting (*Sorry to inter-*

rupt, but _____), topic shift (Oh, by the way, that reminds me _____) and closings (It's been nice talking to you _____).

Learner's and teacher's roles in CLT

The next issue discussed in the article refers to learner's roles within the CLT approach, which Breen and Candlin (Richards, Rogers, 2001, p. 166) depict in the following way: "the role of learner as negotiator – between the self, the learning process, and the object of learning – emerges from and interacts with the role of joint negotiator within the group and within the classroom procedures and activities which the group undertakes. The implication for the learner is that he should contribute as much as he gains, and thereby learn in an interdependent way." Naturally, such cooperative mode where learners themselves are responsible for conducting an interaction without teacher's continuous supervision may be unfamiliar. Consequently, they may encounter certain difficulties which would result in loss of confidence and self-assurance. Therefore, this is the teacher who should gradually prepare learners to become more independent of him. Littlewood (Littlewood, 1981, p. 18) recommends certain solutions. One of them is introduction of undirected activity in small doses and observation of how a group of students responds. Another way is to explain, give clear instructions and demonstrate an activity to learners. Naturally, he must make sure that students understand what they are required to do. The third indication is to provide a group with language forms needed for accomplishing a task.

In Communicative Language Teaching, there are also several roles assigned for teachers. Breen and Candlin (Richards, Rogers, 2001, p. 167) state that "the teacher has two main roles: the first role is to facilitate the communication process between all participants in the classroom, and between these participants and the various activities and texts. The second role is to act as an independent participant within the learning-teaching group. The latter role is closely related to the objectives of the first role and arises from it. These roles imply a set of secondary roles for the teacher: first, as an organizer of resources and as a resource himself, second as a guide within the classroom procedures and activities. ...A third role for the teacher is that of researcher and learner, with much to contribute in terms of appropriate knowledge and abilities, actual and observed experience of the nature of learning and organizational capacities." Other roles assigned for teachers are a *needs analyst*, a counselor, and a group process manager. A needs analyst, is the role where the teacher responds to student language expectations. He

may talk individually with each learner through one-to-one session and gain information concerning preferred styles, strategies, and goals. The other possibility is to prepare a needs assessment instrument in the form of statements like: *I want to study English because it will be easier to get a job; I want to study English because it will allow me to converse with native speakers* and students' task is to reply on a 5-point scale *I strongly agree to I strongly disagree*. Another role assigned in CLT is that of a *counselor*, who helps students to correlate speaker's intention with listener's interpretation through the use of paraphrasing, confirmation, and feedback. The last role is called a *group process manager*. In this case the teacher organizes the classroom as a communication environment and prepares communicative activities. Besides, he monitors, supports and encourages students during an activity and afterwards, he assists them in self-correction discussions. (Richards, Rogers, 2001, pp. 167-168)

Materials supporting CLT

As for materials that support CLT and thus promote communicative language use, Richards and Rogers (Richards, Rodgers, 2001, p. 169) distinguish three types and define these text-based, task-based, and realia. *Text-based* materials refer to various texts present in coursebooks which aim at enhancing communicative capacity. They are in the form of exemplary patterns of dialogues and isolated sentences, drills, visual cues, pictures or sentence fragments which are used to initiate conversation. *Task-based* materials obviously apply to classroom speaking activities among which role-plays, simulations, games, acting from a script, discussions or questionnaires can be mentioned. The third type is called *realia*, which suggests the use of authentic, real-life materials in the classroom. "These might include language-based realia, such as signs, magazines, advertisements, and newspapers, or graphic and visual sources around which communicative activities can be built, such as maps, pictures, symbols, graphs, and charts". (Richards, Rogers, 2001, p. 170)

Principles for designing speaking techniques

Before designing speaking techniques, teachers should take certain factors into consideration like types of learners they work with, their interests, styles, needs and goals. For this reason, Brown (Brown, 2001, p. 275-276) sets a number of principles which are helpful in this matter. Accordingly, teachers should:

- a) use techniques that cover the spectrum of learners needs, from language-based focus on accuracy to message-based focus on interaction, meaning, and fluency,
- b) provide intrinsically motivating techniques,
- c) encourage the use of authentic language in meaningful contexts,
- d) provide appropriate feedback and correction,
- e) capitalize on the natural link between speaking and listening,
- f) give students opportunities to initiate oral communication,
- g) encourage the development of speaking strategies.

Another issue that should be mentioned in this part of the article is a checklist of microskills which appear to be very helpful in the choice of appropriate techniques. Additionally, they help teachers to focus on clearly specified objectives and can be treated as testing criteria at the evaluation stage of oral communication. According to Brown (2001, p. 271), such a list allows students to focus on both forms and functions of language. In his opinion, “in teaching oral communication, we don’t limit students’ attention to the whole picture, even though that whole picture is important. We also help students to see the pieces – right down to the small parts – of language that make up the whole.” The list of microskills is presented below (Brown, 2001, p. 272):

Table 1: Microskills of oral communication

<ol style="list-style-type: none"> 1. Produce chunks of language of different lengths. 2. Orally produce differences among the English phonemes and allophonic variants. 3. Produce English stress patterns, words in stressed and unstressed positions, rhythmic structure, and intonational contours. 4. Produce reduced forms of words and phrases. 5. Use an adequate number of lexical units (words) in order to accomplish pragmatic purposes. 6. Produce fluent speech at different rates of delivery. 7. Monitor your own oral production and use various strategic devices – pauses, fillers, self-correctness, backtracking – to enhance the clarity of the message. 8. Use grammatical word classes (nouns, verbs, etc.), systems (e.g., tense, agreement, pluralisation), word order, patterns, rules, and elliptical forms. 9. Produce speech in natural constituents – in appropriate phrases, pause groups, breath groups, and sentences. 10. Express a particular meaning in different grammatical forms.

11. Use cohesive devices in spoken discourse.
12. Accomplish appropriately communicative functions according to situations, participants, and goals.
13. Use appropriate registers, implicature, pragmatic conventions, and other sociolinguistic features in face-to-face conversations.
14. Convey links and connections between events and communicate such relations as main idea, supporting idea, new information, given information, generalization, and exemplification.
15. Use facial features, kinesics, body language, and other nonverbal cues along with verbal language to convey meanings.
16. Develop and use a battery of speaking strategies, such as emphasizing key words, rephrasing, providing a context for interpreting the meaning of words, appealing for help, and accurately assessing how well your interlocutor is understanding you.

Lewis and Hill (Lewis, Hill 2002, pp. 118-121) present recommendations on how to proceed in the matter of teaching English conversation. According to them, planned conversations usually fail due to the choice of topics which may be too general on the one hand and too specific on the other. Therefore, Lewis and Hill suggest introduction of short and spontaneous oral interactions. This assertion is supported by the fact that out-of-class conversation often proceeds likewise. Hence, it should arise naturally and automatically from the text, the example or any situation that happens in the classroom or outside it. Another guidance is closely referred to the appropriate choice of topic. Most of all, it cannot be the one that fascinates the teacher only, primarily because these are the students who are in the center of attention and these are *they* who must be given a chance to talk about subjects that correlate with *their* interests. Otherwise, if the teacher insists on responding to some tedious issues he may be perceived as a bore. The next point says that teachers should encourage students' contribution without too much interference. "Encouragement can take the form of a general question, an enquiring look, a smile, and, perhaps most importantly of all, a pause during which students have time to formulate their thoughts and to decide what they wish to say, and how they wish to say it". (Lewis, Hill, 2002, p. 119) Also, the authors claim that conversation does not need to be about serious matters. And even if many textbook writers incorporate such topic areas thinking that these reflect interests of their readers, teachers should make prudent choices for they know it is easier to get response from students to less serious issues. The reason for not overloading students with serious matters is the fact that they are exposed to "one of the most difficult *total* skills of language use – the ability to combine the accurate expression of ideas with

its presentation in a social situation. Students are inhibited by lack of language, or they are unwilling to express their views on a subject about which they may not actually care". (Lewis, Hill, 2002, p. 119) Besides, students are better stimulated to produce language when they have to reply to provocative statements rather than answering questions. The question: *Do you think boys and girls should go to the same schools?* and the statement: *I think it's better for boys and girls to be in different classes* exemplify this assumption. Naturally, there are little chances to develop any discussion when a question is formulated. The only response the teacher can get is *yes* or *no* answer, whereas in the case of statement students become more willing to exchange their opinions and attitudes. Then, it leads to at least a short but still a spontaneous language production. Since conversation consists of the exchange of information, the implementation of problem solving activities is thoroughly justified. They are based on information gaps which prompt students to talk and use necessary information gathered both from lessons and from their own experience outside the language learning classroom. Lewis and Hill (Lewis, Hill 2002, p. 121) conclude as follows: "...the extraordinary thing is that students spontaneously respond to each other's opinions and ideas. Such responses are not, however, accidental – they are based on the fact that students bring into the classroom knowledge which they can use. They do not feel at risk in discussing a problem; it is within their linguistic capability; different people can, legitimately, have different opinions; people care enough to 'correct' others' opinions, but not *enough* to feel inhibited by the topic."

Types of activities

Two major categories of activities in Communicative Language Teaching are distinguished by Littlewood. He introduces *functional communication activities* and *social interaction activities*. The first category includes activities where students "are not required to attempt to choose language which is appropriate to any particular situation. It may not even matter whether the language they use is grammatically accurate. The main purpose of the activity is that learners should use the language they know in order to get meanings across as effectively as possible. Success is measured primarily according to whether they cope with the communicative demands of the immediate situation". (Littlewood, 1981, p. 20) This category is represented by tasks such as:

- a) identifying pictures,
- b) discovering activities (e.g., identical pairs, sequences or locations, missing information or missing features, 'secrets', differences or similarities),

- c) communicating patterns, pictures, models,
- d) following directions,
- e) reconstructing story-sequences (a picture-strip story without dialogues),
- f) pooling information to solve a problem. (Littlewood, 1981, pp. 23-27, 31-35)

As for the second category, students are required to use language which is not only functionally effective but also it is appropriately used in a particular social context. Littlewood (Littlewood, 1981, pp. 46-64) suggests implementation of more complex and thus linguistically demanding activities. These are conversation or discussion sessions, dialogues and role-plays, simulations, improvisations, and debates.

Moreover, Brown (Brown, 2001, pp. 134-135) displays three main categories of language-teaching techniques and these are: controlled, semi-controlled, and free:

Table 2: Taxonomy of language-teaching techniques (oral production)

<p>Controlled Techniques</p> <ol style="list-style-type: none"> 1. <i>Warm-up</i>: This activity gets the students stimulated, relaxed, motivated, attentive, or otherwise engaged and ready for the lesson. 2. <i>Role-play demonstration</i>: Selected students or teacher illustrate the procedure(s) to be applied in the lesson segment to follow. Includes brief illustration of language or other content to be incorporated. 3. <i>Dialogue/Narrative recitation</i>: Reciting a previously know or prepared text, either in unison or individually. 4. <i>Question-answer, display</i>: Activity involving prompting of student responses by means of display questions. 5. <i>Drill</i>: Typical language activity involving fixed patterns of teacher prompting and student responding, usually with repetition, substitution, and other mechanical alterations. Typically with little meaning attached. 6. <i>Identification</i>: Student picking out and producing/ labeling or otherwise identifying a specific target form, function, definition, or other lesson-related item. 7. <i>Meaningful drill</i>: Drill activity involving responses with meaningful choices, as in reference to different information. <p>Semi controlled Techniques</p> <ol style="list-style-type: none"> 1. <i>Brainstorming</i>: A special form of preparation for the lesson, like Setting, which involves free, undirected contributions by the students and teacher on a given topic, to generate multiple associations without linking them; no explicit analysis or interpretation by the teacher.

2. *Story telling (especially when student-generated)*: Not necessarily lesson-based, a lengthy presentation of story by teacher or student.
3. *Question-answer, referential*: Activity involving prompting of responses by means of referential questions.
4. *Cued narrative/Dialogue*: Student production of narrative or dialogue following cues from miming, cue cards, pictures, or other stimuli related to narrative/dialogue.
5. *Information exchange*: Task involving two-way communication as in information gap exercises, when one or both parties (or a larger group) must share information to achieve some goal.
6. *Wrap-up*: Brief teacher- or student-produced summary of point and/ or items that have been practiced or learned.
7. *Narration/exposition*: Presentation of a story or explanation derived from prior stimuli.
8. *Preparation*: Student study, silent reading, pair planning and rehearsing, preparing for later activity. Usually a student-directed or -oriented project.

Free Techniques

1. *Role-play*: Relatively free acting out of specified roles and functions.
2. *Games*: Various kinds of language game activity.
3. *Report*: Report of student-prepared exposition of books, experiences, project work, without immediate stimulus, and elaborated on according to students interests.
4. *Problem solving*: Activity involving specified problem and limitations of means to resolve it; requires cooperation on part of participants in small or large group.
5. *Drama*: Planned dramatic rendition of play, skit, story, etc.
6. *Simulation*: Activity involving complex interaction between groups and individuals based on simulation of real-life actions and experiences.
7. *Interview*: A student is directed to get information from another student or students.
8. *Discussion*: Debate or other form of grouped discussion of specified topic, with or without specified sides/positions prearranged.
9. *A propos*: Conversation or other socially oriented interaction/speech by teacher, students, or even visitors, on general real-life topics. Typically authentic and genuine.

Apart from categorization of techniques, Brown (Brown, 2001, pp. 271-274) additionally introduces six types of oral production. The first of them is called *imitative* and its purpose is to practice some particular elements of language forms like a certain vowel sound, intonation or strings of discourse. Drills, which give an opportunity for repetition in a controlled manner, are

a good example. This type of exercise is considered effective when:

- a) it is short,
- b) it is simple,
- c) it is 'snappy',
- d) its use is justified,
- e) it is limited to phonology or grammar points,
- f) it thoroughly leads to communication,
- g) it is not overused.

The second type of oral production that goes beyond the imitative one is labeled *intensive*. It includes any speaking performance designed for practicing different aspects of language and it can be self-initiated or can form a part of pair work activities. Another type, known as *responsive*, refers to short replies to teacher- or student-initiated questions. Even though such speech is authentic and meaningful, it does not extend into dialogues, for instance: *How are you today? Pretty good, thanks, and you?* The more extended form of a responsive type and thus, taking the structure of a conversation is called *transactional*. It includes a form of negotiation where the transmission of facts and information is essential. Moreover, it can be a part of group work activity. The other form of conversation is interpersonal dialogue which aims at maintaining social relationships. This type of oral production may be more intricate for students because it includes additional factors which are constituent parts of interpersonal dialogues. These are:

- a) casual register,
- b) colloquial language,
- c) emotionally charged language,
- d) slang,
- e) ellipsis,
- f) sarcasm,
- g) covert 'agenda'.

And, the last type is referred to as *extensive* where students are asked to perform monologues "in the form of oral reports, summaries, or perhaps short speeches. Here the register is more formal and deliberative. These monologues can be planned or impromptu". (Brown, 2001, p. 274)

Summary

On the basis of the above elaborations, it may be clearly stated that Communicative Language Teaching has a rich theoretical base. Supported by a number of distinctive features, it becomes fundamental in developing

oral production. Even though the main goal of this approach is to acquire fluent, authentic and meaningful exchange of information, it also proves that communication is not only about speaking. It combines other skills which need to be simultaneously developed. What is more, the CLT approach assumes that students need to be given a context so that they know what language to use to reflect a given situation. Additionally, it suggests that learners should be acquainted with the purpose of conversation in order to create clear messages that are easily comprehended by other partakers. Thus, to make them competent interlocutors in oral production, teachers have a wide variety of conversational strategies, materials, techniques and activities supporting assumptions of CLT approach at their disposal.

Exemplary exercises:

I. Identity cards

<i>Aims</i>	<i>Skills</i> – speaking (writing) <i>Language</i> – questions about personal data <i>Other</i> – introducing someone else to the group, getting to know each other
<i>Level</i>	Intermediate
<i>Organisation</i>	Pairs
<i>Preparation</i>	As many identity cards as there are students
<i>Time</i>	10-30 minutes
<i>Procedure</i>	<i>Step 1:</i> The students are grouped in pairs and each of them receives a blank identity card. <i>Step 2:</i> The two students in each pair now interview each other in order to fill in the blanks on the identity card. <i>Step 3:</i> Each student introduces his partner to the class using the identity card as a memory aid.
<i>Variations</i>	<i>1:</i> The paired interviews can be conducted without identity cards. Each student must find out those things from his partner which he thinks are important or interesting. <i>2:</i> The task 'Find out five things about your partner that one could not learn just by looking' can be given before the interview starts. <i>3:</i> Each student draws a portrait on the identity card. All the cards are exhibited on the classroom wall. <i>4:</i> If these interviews are done at the beginning of a course or seminar a question about individual expectations can be added.

5: With a very simple identity card this activity is suitable for beginners as well. An appropriate card might look like this.

Example:

name:	three things I like:
family:	
hobbies:	three things I don't like:
something I'd like to do:	

Example 1: Warm-up exercise (Klippel, 1985, p. 16).

II. 'Cued dialogue'

Partner A

You meet B in the street.

A: Greet B.

B:

A: Ask B where he is going.

B:

A: Suggest somewhere to go together.

B:

A: Accept B's suggestion.

B:

Partner B

You meet A in the street.

A:

B: Greet A.

A:

B: Say you are going for a walk.

A:

B: Reject A's suggestion. Make a different suggestion.

A:

B: Express pleasure.

Example 2: A 'cued dialogue' exercise. (Littlewood, 1981, p. 14)

III. Rescue

Aims

Skills – speaking

Language – stating an opinion, giving and asking for reasons, agreeing and disagreeing, comparisons

Other – thinking about one's values

Level

Intermediate/ advanced

Organisation

Groups of five to eight students

Preparation

None

Time

10-20 minutes

Procedure

Step 1: The teacher explains the situation: 'The Earth is doomed. All life is going to perish in two days due to radiation. A spaceship from another solar system lands and

offers to rescue twelve people, who could start a new world on an empty planet very much like Earth. Imagine you are the selection committee and you have to decide who may be rescued. Think of a list of criteria which you would use in your decision.'

Step 2: Each group discusses the problem and tries to work out a list.

Step 3: Each group presents its list of criteria to the class. The lists are discussed.

Variations The task can be made more specific, e.g. 'Find ten criteria.' You can award up to 100 points if a candidate gets full marks on all accounts, e.g. appearance 5, intelligence 30, fertility 15, physical fitness 20, etc.

Remarks Although the basic problem is rather depressing one, it helps students to clarify their own values as regards judging others.

Example 3: Problem solving exercise. (Klippel, 1985, p. 104)

IV. The expert

A student plays the role of 'expert' and talks to the rest of the class on a subject he or she knows something about.

<i>Level</i>	Intermediate upwards
<i>Time</i>	20 minutes
<i>Aim</i>	To channel students' own experience into a more structured and demanding activity than simple conversation.
<i>Language</i>	Various, according to the topic chosen. For example, a sport topic, such as wind-surfing, would involve describing the activity, whereas a political topic, such as the probable result of an election, would involve making hypotheses.
<i>Organization</i>	The whole class, or groups of about twelve.
<i>Preparation</i>	None
<i>Warm-up</i>	Elicit answers to the following questions from the whole class: <ul style="list-style-type: none"> - <i>What is an 'expert'?</i> - <i>How do you become an 'expert'?</i> - <i>What do 'international experts' from the United Nations or from UNESCO do?</i>

- Procedure*
- 1: In a very large class, make sub-groups of twelve students or so. Otherwise, ask the class to form a circle round a volunteer 'expert'.
- 2: Tell the rest of the class that they are journalists, and they are asking the expert questions for an article for their newspapers. After a few general questions the students should be encouraged to make them more detailed. An example might be:
An expert on the health of top class athletes might be asked the following questions:
- How do top class athletes stay fit?
 - What are the long-term health risks in different sports?
 - Can you describe the medical check-ups made on athletes for the three month period before an important event, such as the Olympics?
 - What are the drugs that top class athletes take, and what exactly are the effects on their bodies?
- 3: Stop the interview after a previously fixed time limit.
- 4: If you think it desirable, re-run the activity with another volunteer 'expert' on a different topic.
- Remark*
- The 'experts' can prepare their topics for homework. The journalists should decide what kind of paper they work for, e.g. left-wing, or right-wing, a quality or popular newspaper. This will influence the type of questions they ask.
- Follow-up*
- Present the class with different newspaper articles on the same theme and discuss the difference in style. Then ask the students to write up the expert's answers in the form of a newspaper article for the type of paper they had chosen. Blu-Tack the reports to the wall, and ask the students to identify the styles, and types of newspapers. If necessary, correct errors in style.

Example 4: Role-play exercise. (Ladousse, 1987, pp. 119-120)

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Kultura – Culture



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Język staro-cerkiewno-słowiański w Kościele i kulturze narodów słowiańskich

Church Slavonic language in Church and culture of Slavic peoples

Abstrakt

Artykuł szczegółowo opisuje historię misji morawskiej świętych Cyryla i Metodego oraz historię tworzenia alfabetu słowiańskiego, a także przedstawia najważniejsze momenty zwrotne w procesie powstawania pisma słowiańskiego w Bułgarii, Polsce, Czechach i na Rusi Kijowskiej. Autor wysuwa tezę, że stworzony przez Braci Sołuńskich język sakralny od początku stał się językiem, w którym odprawiano nabożeństwa i głoszone kazania, a także językiem teologii, filozofii i hagiografii. Historia szerzenia się tradycji cyrylo-metodiańskiej u Słowian Zachodnich, Południowych i Wschodnich przedstawiona została na podstawie analizy najstarszych żywotów Świętych Braci, a także bułgarskich, polskich, czeskich i staroruskich za- bytków rękopiśmiennych i świadectw średniowiecznych kronikarzy. Osobno omawiana jest historia języka staro-cerkiewno-słowiańskiego w redakcji ruskiej. Przeanalizowano sytuację językową na dawnej Rusi porównując funkcjonowanie języka staroruskiego i języka staro-cerkiewno-słowiańskiego. Szczegółowo zbadano kwestię rozwoju języka staro-cerkiewno-słowiańskiego na Rusi Południowo-Zachodniej i na Rusi Moskiewskiej, a także powstanie redakcji ogólnoruskiej tego języka w drugiej połowie XVII wieku.

Słowa kluczowe: *język staro-cerkiewno-słowiański, tradycja cyrylo-metodiańska,*

język sakralny, nabożeństwo, dwujęzyczność, kultura, dziedzictwo, Morawy, Bułgaria, Polska, Czechy, Ruś Kijowska, Ruś Moskiewska, Ruś Południowo-Zachodnia.

Abstract

The paper comprehensively describes the history of saints Cyril and Methodius, Moravian mission and the creation of the Slavic alphabet, as well as outlines the main milestones of the Slavic written language formation in Bulgaria, Poland, Czechia and Kievan Rus. The author puts forward the thesis that the sacred language created by the Solun brothers became the language of liturgy and homilies from the very beginning, as well as the language of theology, philosophy and hagiography. The history of the Cyril-Methodius tradition, spreading among the Western, Southern and Eastern Slavs, is presented in relation to the analysis of the ancient legends of the Holy brothers, as well as Bulgarian, Polish, Czech and Old Russian manuscripts and medieval chroniclers. The history of the Russian version of the Church Slavonic language is separately considered. The language role in Ancient Rus is analysed, taking into account the point of correlation between the Old Russian and Church Slavonic languages. The problem of the Church Slavonic evolution and functioning in South-Western and Moscow Rus is studied in detail, as well as the formation of a common all-Russian version of this language in the second half of the 17th century.

Key words: *Church Slavonic language, Cyril-Methodius tradition, sacred language, liturgy, bilingualism, culture, heritage, Moravia, Bulgaria, Poland, Czechia, Kievan Rus, Moscow Rus, South-Western Rus.*

W połowie IX wieku w życiu religijnym i kulturalnym Europy miały miejsce zdarzenia, które wywarły kluczowy, decydujący wpływ na losy i historię narodów słowiańskich. Słynni bracia z Sołunia, święci Kościoła katolickiego i prawosławnego, Michał – arcybiskup Moraw, znany pod swoim zakonnym imieniem Metody i jego brat Konstanty, znany jako Cyryl, realizując misję ewangelizacji i katechezy w Państwie Wielkomorawskim, stworzyli alfabet słowiański, zapoczątkowali praktykę nabożeństw w języku ojczystym Słowian i dali impuls do rozwoju oryginalnej i jednolitej kultury słowiańskiej.

Celem największego zadania teologicznego i kulturalnego, które postawili przed sobą święci Cyryl i Metody, było stworzenie nie tylko nowego pisma dla Słowian, ale także języka liturgii i modlitwy. W ten sposób w wyniku tłumaczenia z języka greckiego Pisma Świętego i chrześcijańskich ksiąg liturgicznych został stworzony literacki język słowiański, który przyjęto nazywać

językiem staro-cerkiewno-słowiańskim. Warto zauważyć, że był to przede wszystkim język sakralny, w którym odbywały się nabożeństwa i głoszone były kazania. Był językiem teologii, filozofii, hagiografii, nie używano go zaś jako języka potocznego, języka komunikacji domowej. „Co za tym idzie, język staro-cerkiewno-słowiański był ostatnim językiem literackim, którego powstanie było połączone ze stworzeniem specjalnie w tym celu alfabetu”. (Хабыпраев, 1994, s. 5)

W historii kultury średniowiecznej Europy działalność Braci Sołuńskich można uznać za wyjątkową, ponieważ od czasu ustanowienia w Europie Kościoła chrześcijańskiego na przestrzeni całych wieków – od stworzenia słynnej Wulgaty przez świętego Hieronima aż do początku ruchów narodowych XV-XVI wieku – w pracach apostołów Słowian mamy jedyny przypadek tłumaczenia Pisma Świętego i tekstów liturgicznych na język ojczysty wiernych, którzy do tego czasu nie mieli ani własnego piśmiennictwa, ani tradycji literackiej. W związku z tym, że działalność świętych Cyryla i Metodego przypada na ostatni okres słowiańskiej jedności językowej, z wyników ich prac mogli korzystać z takim samym powodzeniem zarówno Słowianie południowi i zachodni, jak i wschodni, co potwierdza historia rozwoju i rozprzestrzeniania się piśmiennictwa i kultury słowiańskiej. To największe w historii Kościoła i nauki dokonanie świętych Cyryla i Metodego zostało docenione w całym świecie słowiańskim.

Cyryl i Metody prowadzili misję wśród Słowian na Morawach. Wielkie Morawy były średniowiecznym państwem słowiańskim położonym nad Środkowym Dunajem, istniejącym w latach 822-907. (zob. Třeštík, 2010) W okresie największej potęgi obejmowało ono terytorium współczesnej Słowacji, Czech, Słowenii, Chorwacji, Serbii i Węgier, a także Małopolskę, Śląsk i część Ukrainy Zachodniej. Dzięki działalności Braci Sołuńskich na tych zamieszkałych przez Słowian ziemiach rozprzestrzeniła się religia chrześcijańska.

Cesarz bizantyjski Michał na prośbę władcy Państwa Wielkomorawskiego Roścysława skierował obu braci z misją właśnie do tego kraju. Latem 863 r. apostołowie Słowian przybyli do miasta Welehrad – stolicy Moraw. Książę Roścysław przyjął braci z radością i honorami. Cyryl na bazie alfabetu greckiego opracował alfabet staro-cerkiewno-słowiański i wraz z Metodym dokonał również przekładu Pisma Świętego i ksiąg liturgicznych. Wkrótce bracia wybrali sobie uczniów, których zaczęli nauczać pisma i rytu słowiańskiego. (Měřínský, 2006, s. 287)

Jednak bracia napotkali na Morawach wiele trudności. Roścysław prowadził ciągłe walki z sąsiednimi Niemcami, co spowodowało, że pozycja władcy osłabła, zaś niemieckie duchowieństwo nasiliło ataki na świętych Braci i ich

zwolenników. W związku z tym Cyryl i Metody w 868 roku udali się do Rzymu, gdzie zdobyli przychylność papieża Hadriana II, przywożąc mu w darze odnalezione na Krymie szczątki św. papieża-męczennika Klemensa. Cyryl i Metody uzyskali poparcie pontyfika dla swej działalności, a także uznanie przez niego liturgii słowiańskiej. Widoczną oznaką tego błogosławieństwa stała się decyzja papieża o wyłożeniu słowiańskich ksiąg liturgicznych w kościołach Rzymu. (Тахиаос, 2005, s. 125) Hadrian II pozwolił też wyświęcić na kapłanów dużą grupę uczniów Cyryla i Metodego. W tym samym czasie Cyryl, który zawsze miał problemy ze zdrowiem, wstąpił do klasztoru, gdzie 14 lutego 869 roku zmarł na rękach swego brata Metodego. Jego ciało spoczywa w bazylice św. Klemensa w Rzymie.

Po śmierci Cyryla, Hadrian II mianował Metodego arcybiskupem, legatem papieskim na Morawach i w Panonii. (Тахиаос, 2005, s. 140) Po powrocie na Morawy Metody kontynuował działalność w zakresie szerzenia słowiańskiej liturgii, piśmiennictwa oraz tłumaczenia z języka greckiego tekstów religijnych i prac teologicznych. Jego słowiańskie przekłady świadczą o głębokiej znajomości terminologii teologicznej i liturgicznej, wyróżniają się kreatywnym podejściem i niedoścignionym talentem filologicznym. Misja arcybiskupa Metodego ponownie spotkała się ze sprzeciwem niemieckiego duchowieństwa, uważającego Morawy za swoje „terytorium kanoniczne”. Metody został uwięziony i oskarżony o herezję, za którą jego przeciwnicy uważali prowadzenie nabożeństw w języku słowiańskim. Święty zwrócił się do papieża Jana VIII, który uznał jego działania za słuszne. Po tym uzasadnieniu arcybiskup Metody kontynuował swoją misję na Morawach. W efekcie święci misjonarze Cyryl i Metody wraz z uczniami dokonali wielkiego dzieła, które spowodowało szerzenie się sakralnego języka staro-cerkiewnosłowiańskiego, zapoczątkowało intensywny rozwój literatury sakralnej wśród wszystkich Słowian i dało mocny impuls do rozwoju kultury słowiańskiej.

Niestety śmierć świętego Metodego w roku 885, upadek Państwa Wielkomorawskiego z powodu najazdu węgierskiego w latach 902-907 oraz powrót na te ziemie niemieckich hierarchów nie sprzyjały powodzeniu misji świętych braci wśród Słowian na tych terenach. Wypędzonych z Moraw uczniów świętego Metodego: Klemensa, Nauma, Sawę i Angelariusza przyjął car Bułgarii Borys I Michał (852-889), kierując ich do pracy duszpasterskiej w swoim państwie. (Тахиаос, 2005, s. 161)

Działalność uczniów świętego Metodego, skupionych wokół ośrodków w Presławiu i Ochrydzie, dała początek Bułgarskiemu Kościołowi Prawosławnemu. Gdy za czasów cara Symeona I Wielkiego (893-927) Bułgaria osiągnęła potęgę polityczną i świetność kulturalną, dzieło świętych Cyryla

i Metodego kontynuowała cała plejada wybitnych działaczy oświecenia słowiańskiego. Byli to Jan Egzarcha, Klemens z Ochrydy, Naum z Ochrydy, Czernorizec Chrabyr, Konstantyn Presławski i Grzegorz Mnich. (Камчатнов, 2002, s. 16) Następcy Braci Sołuńskich sami wiele tłumaczyli, pisali własne prace i nauczali swoich uczniów pisma słowiańskiego. Odręczne zbiory pism stworzone przez bułgarskich tłumaczy wniosły istotny wkład do skarbcza patrystycznej myśli teologicznej i w dużych ilościach rozpowszechniły się wśród narodów słowiańskich. Pierwszą taką księgą był tak zwany „Sbornik cara Symeona” (Курев, 1979, s. 16-17), sporządzony w Presławiu na polecenie cara Bułgarii jako zbiór pism Ojców Kościoła, objaśnień dotyczących Ewangelii, Dziejów Apostolskich i ksiąg skróconych „dla pamięci i gotowej odpowiedzi”.

Nowa epoka w rozprzestrzenianiu się języka staro-cerkiewno-słowiańskiego nastąpiła pod koniec XI wieku, gdy po chrzcie Rusi zaczęło tam powstawać nowe centrum piśmiennictwa i kultury słowiańskiej, stworzone na najlepszych wzorcach tradycji cyrylo-metodiańskiej.

W ten sposób można wyróżnić następujące etapy kształtowania się języka staro-cerkiewno-słowiańskiego i jego rozwoju: IX wiek – misja świętych Cyryla i Metodego oraz ich uczniów w Wielkich Morawach; X wiek – działalność uczniów Braci Sołuńskich w Carstwie Bułgarskim; XI wiek – rozprzestrzenianie się piśmiennictwa słowiańskiego na Rusi Kijowskiej.

Od tego czasu język staro-cerkiewno-słowiański stał się narzędziem kultury duchowej, rozwijał się i „w różny sposób zmieniał się w różnych krajach Slavia Orthodoxa (czyli wśród Słowian prawosławnych), co prowadziło do powstania lokalnych redakcji języka średniowiecznego piśmiennictwa słowiańskiego w Bułgarii, Serbii i na Rusi”. (Хабыраев, 1994, s. 5)

Można stwierdzić, że od początku w zamyśle świętych Cyryla i Metodego stworzony przez nich język staro-cerkiewno-słowiański miał być narzędziem bizantynizacji kultury Słowian. To doprowadziło do rozprzestrzeniania się kultury bizantyjskiej najpierw do Wielkich Moraw, a potem na ziemie bułgarskie, serbskie i ruskie, w wyniku czego tereny zamieszkałe przez Słowian stopniowo stawały się częściami świata bizantyjskiego. W ten sposób język staro-cerkiewno-słowiański okazał się wspólnym językiem literackim prawosławnych Słowian i powstała słowiańska wersja bizantyjskiej tradycji kulturalnej.

Należy zauważyć, że językiem staro-cerkiewno-słowiańskim posługiwali się nie tylko sami Słowianie. W X wieku dialekty słowiańskie mogły funkcjonować jako język komunikacji międzyetnicznej (jako lingua franca) wśród plemion niesłowiańskich. I tak, żydowski podróżnik Ibrahim ibn Jakub około 965 roku informuje, że językiem słowiańskim posługiwali się Warego-

wie. (Soloviev, 1968, s. 261) Rusko-bizantyjskie umowy z Grekami z lat 911 i 944 (jeszcze przed chrztem Rusi) zostały spisane w języku cerkiewno-słowiańskim i możliwe, że w tym samym języku były prowadzone i negocjacje. (Успенский, 2002, s. 45-46)

Mówiąc o znaczącej roli świętych Cyryla i Metodego w przyjęciu chrześcijaństwa i rozprzestrzenianiu się piśmiennictwa wśród Słowian Moraw, Bułgarii i Rusi, nie można pominąć ich znaczenia dla Słowian Zachodnich. Często niesłusznie zapomina się o misji apostołów Słowian oraz ich uczniów wśród Czechów i Polaków. Tymczasem potwierdza ją dostatecznie wiele faktów historycznych.

W „Żywocie świętego Metodego” spisanim na Morawach przez jego uczniów jest mowa o tym, że namawiał on do chrztu potężnego „księcia pogańskiego”, który rządził na brzegu Wisły. (Королюк, 1981, s. 99) Oczywiście był to książę Wiślan, który prześladował chrześcijan. W liście niemieckich biskupów do papieża Jana IX z 900 roku, a także w katalogu biskupów krakowskich z XI wieku odnajdujemy dowody na istnienie obrządku słowiańskiego na ziemiach polskich. (Lehr-Splawiński, 1961, s. 43-47) Wydaje się, że proces ewangelizacji w Małopolsce i na Śląsku rozpoczął się jeszcze za życia świętego Metodego podczas jego drugiego pobytu na Morawach, czyli w latach 873-885. Można zatem stwierdzić, że wbrew dominującym koncepcjom dotyczącym początków chrześcijaństwa na ziemiach polskich, sprawowanie liturgii słowiańskiej miało miejsce jeszcze przed oficjalnym aktem chrystianizacji państwa polskiego. (Mironowicz, 2002, s. 229)

W ten sposób tradycja cyrylo-metodiańska była kultywowana w Małopolsce i na Śląsku od drugiej połowy wieku IX, gdy tereny te wchodziły w skład Wielkich Moraw, a potem znajdowały się pod panowaniem czeskiej dynastii Przemyślidów. Tradycja ta musiała istnieć i w państwie Piastów, ponieważ Mieszko I ożenił się z córką króla czeskiego Bolesława I i przyjął wiarę chrześcijańską z Czech w 966 roku. Jest oczywiste, że to z Czech wraz ze słowiańską liturgią w państwie polskim rozprzestrzeniło się i piśmiennictwo słowiańskie. (Havránek, 1956, s. 300-305)

Oczywiście „określenie roli obrządku słowiańskiego w całokształcie dziejów chrześcijaństwa polskiego wchodzi głęboko w pokłady uczuciowe polskiej świadomości religijnej”. (Klinger, 1967, s. 33) Na podstawie badań polskich historyków stworzona została pełna koncepcja, „która udowadniała powstanie biskupstwa metodiańskiego w Krakowie po wypędzeniu z Moraw duchowieństwa obrządku słowiańskiego. Według tej koncepcji uczeń Metodego Gorazd uszedł do Polski, przenosząc siedzibę biskupstwa morawskiego do Krakowa i w ten sposób stolica państwa Wiślan miałyby w jakimś sensie

być kontynuacją metropolii metodiańskiej. W czasach Bolesława Chrobrego w Krakowie obok nowej katedry łacińskiej św. Wacława istniała katedra słowiańska św. Michała”. (Mironowicz, 2002, s. 229)

Potwierdzenie tej koncepcji znajdujemy w najstarszej polskiej kronice z początku XII wieku. Gall Anonim podaje, że: „suo tempore Polonia duos metropolitanos cum suis suffraganeis continebat”. (Galli Anonymi..., 1952, s. 30) Wynika z tego, że na początku XI wieku w Polsce było dwóch metropolitów ze swoim klerem. W związku z tym prawdopodobne jest, że w tym czasie na ziemiach polskich równolegle istniały dwie archidiecezje – słowiańska i łacińska.

Jeszcze jednym dowodem na to, że na ziemiach polskich istniała tradycja cyrylo-metodiańska ze słowiańską liturgią, służy polska terminologia chrześcijańska, która pod koniec pierwszej połowy XI wieku kształtowała się na bazie czeskiej redakcji języka staro-cerkiewno-słowiańskiego. Jako dowód mogą służyć cechy lingwistyczno-tekstologiczne słynnej pieśni kościelnej „Bogurodzica”. Najstarsza polska pieśń religijna pochodząca z X lub XI wieku została napisana w nurcie bizantyjskiej tradycji hymnograficznej i zawiera charakterystyczne elementy języka staro-cerkiewno-słowiańskiego oraz morawizmu. (Мошин, 1963, s. 47)

Wiadomo również, że słowiańska liturgia w Polsce długo utrzymywała się w opactwie benedyktynów w Tyńcu niedaleko Krakowa. Właśnie tam mógł zostać sporządzony przekład na język staro-cerkiewno-słowiański łacińskiego tekstu liturgicznego, o czym miałyby świadczyć cechy fonetyczne występujące w tłumaczeniu. Przekład zachował się w słynnym zabytku początku XI wieku, znanym jako Mszał Kijowski. (Соболевский, 1910a, s. 107-109)

W Czechach, podobnie jak w Polsce, tradycja cyrylo-metodiańska nie była krótkotrwałym epizodem. Co więcej, w państwie Przemyślidów było kultywowane dziedzictwo cerkiewno-literackie oraz kulturowo-polityczne. W 1079 roku król Wratysław II poprosił papieża o zgodę na używanie rytu słowiańskiego. (Мошин, 1963, s. 35)

Tradycja cyrylo-metodiańska w Czechach była bardzo popularna, dzięki czemu można mówić o szczególnym morawsko-czeskim typie języka staro-cerkiewno-słowiańskiego. Świadczą o tym teksty, które zachowały się w spisach staroruskich lub w czeskich i morawskich wykazach utworów literackich.

Materiał leksykalny niektórych staroruskich i południowosłowiańskich zabytków literackich wskazuje na to, że wcześniej zostały one przetłumaczone z łaciny na język staro-cerkiewno-słowiański na Morawach lub w Czechach. Należą do nich „Rozmowy” świętego papieża Grzegorza Wielkiego (Dwojesłowa), apokryficzna Ewangelia Nikodema (Соболевский, 1910b, s. 48-91), znaczna liczba żywotów świętych, w tym męczennika Jerzego Zwy-

ciężcy, świętego papieża Klemensa, świętego Wita (na cześć którego została poświęcona katedra w Pradze) itp. (Успенский, 2002, s. 69)

Na szczególną uwagę zasługują również „Fragmenty praskie” z XI wieku, zawierające wyciągi z niesporów w obrządku wschodnim. (Pražské zlomky, 1904, s. 48-90) Oczywiście jest, że ten zabytek staroczeski wywodzi się z oryginału ruskiego i został napisany w redakcji zachodniosłowiańskiej przez mnichów klasztoru Sazawskiego, gdzie liturgia słowiańska była prowadzona aż do roku 1096. (zob. Oldřich, 1961) Warto zauważyć, że święty Prokop – założyciel i pierwszy opat klasztoru – prawdopodobnie jest autorem części cyrylickiej słynnego Ewangeliarza z Reims – staro-cerkiewno-słowiańskiego rękopisu z XI wieku. (Vašica, 1953, s. 12)

Na podstawie tych danych można stwierdzić, że „jednocześnie z liturgią w języku słowiańskim u Słowian zachodnich istniała bardziej lub mniej reprezentacyjna literatura w języku staro-cerkiewno-słowiańskim. Ta literatura obejmowała w szczególności zabytki hagiograficzne oraz kanoniczne, a także wiele tłumaczeń z łaciny prac teologicznych”. (Успенский, 2002, s. 69-69)

Wszystko to potwierdza oczywisty fakt długotrwałego istnienia u Słowian zachodnich ciągłej tradycji cyrylo-metodiańskiej, opartej na używaniu języka staro-cerkiewno-słowiańskiego nie tylko na Morawach i w Panonii, lecz także w sąsiednich Czechach i w Polsce w wiekach X-XI.

Jak widać, dzięki językowi staro-cerkiewno-słowiańskiemu można mówić o językowej i kulturowej specyfice dużego obszaru słowiańszczyzny. Stworzony przez świętych Cyryla i Metodego język staro-cerkiewno-słowiański rozpowszechnił się nad Środkowym Dunajem, w Czechach, w Polsce, w Bułgarii, a następnie rozprzestrzenił się i na Rusi Kijowskiej docierając aż do Serbii. Wszędzie był postrzegany jako język ojczysty oraz jako jedyny język literatury i kultury słowiańskiej. (Хабургаев, 1994, s. 117)

Tradycja cyrylo-metodiańska najdłużej i najbardziej owocnie rozwijała się na Rusi Kijowskiej. Właśnie tam piśmiennictwo słowiańskie oraz język staro-cerkiewno-słowiański jako literacki rozpowszechniły się jeszcze za czasów świętego księcia Włodzimierza I Chrzciciela (978-1015), następnie zwiększyły swój zasięg, wychodząc poza środowiska kościelne oraz krąg arystokracji książęcej. „Gramoty” na korze brzozonej świadczą o tym, że w XI wieku edukacja szkolna wśród mieszkańców Nowogrodu Wielkiego była niemal powszechna. (Янин, 1965, s. 44-45) Nawet kobiety uczyły się czytać i pisać. Podpis księżniczki kijowskiej i królowej Francji Anny Jarosławówny pod francuskim dokumentem z 1063 roku wskazuje na to, że edukacja kobiet w środowisku książęcym była szeroko praktykowana.

Biorąc to wszystko pod uwagę, „mamy wszelkie powody, aby traktować język staro-cerkiewno-słowiański, jako ruski język literacki epoki średniowiecza. W rzeczywistości ten język, choć i został zapożyczony z zewnątrz, nigdy nie był traktowany jako język obcy, dlatego od samego początku wchodzi w bliskie relacje z językiem mówionym Słowian wschodnich i wkrótce zaczyna być postrzegany jako odmiana kodyfikacyjna tego właśnie języka. W wyniku adaptacji języka staro-cerkiewno-słowiańskiego na Rusi powstaje jego specjalna redakcja. W ten sposób odbywa się implantacja języka staro-cerkiewno-słowiańskiego na gruncie ruskim, gdzie zapuszcza on głębokie korzenie”. (Успенский, 2002, s. 23)

Proces ten rozwijał się bardzo szybko, więc już w połowie XI wieku na Rusi „kształtowanie lokalnej redakcji języka staro-cerkiewno-słowiańskiego pod względem adaptacji tradycji literackiej do cech mowy starożytnej zostało praktycznie zakończone”. (Хабыраев, 1994, s. 165) Świadczy o tym pojawienie się staroruskich zabytków literackich zarówno tłumaczonych, jak i oryginalnych. Oprócz tekstów liturgicznych na Rusi pojawiła się literatura teologiczna: tłumaczenia z języka greckiego pism Ojców Kościoła, zbiory żywotów świętych, przypowieści, kroniki historyczne.

Za najważniejsze zabytki piśmiennictwa staroruskiego należy uznać Kodeks Nowogrodzki z 999 roku, Ewangelia Ostromira 1054 roku, Izborniki Światosława z 1073 i 1076 roku, „Słowo o zakonie i łasce” z połowy XI wieku, „Powieść minionych lat” z początku XII wieku itp.

Dla sytuacji językowej na średniowiecznej Rusi charakterystyczna jest tak zwana dyglosja. Język staro-cerkiewno-słowiański faktycznie stał się pierwszym językiem literackim i językiem tradycji piśmienniczej, a język staroruski używany był przeważnie w kontaktach codziennych. Oba języki wywierały na siebie wzajemny wpływ. „Ruski wpływ na język staro-cerkiewno-słowiański przejawia się w tym, że oddzielne cechy językowe zostały zapożyczone do języka staro-cerkiewno-słowiańskiego w redakcji ruskiej, to znaczy wchodziły do normy tego języka. Oczywiście taki wpływ był ograniczony, ponieważ przeciwstawiał mu się konserwatyzm językowy normy książkowej. W ten sposób staroruski żywioł językowy przechodził przez filtr normy staro-cerkiewno-słowiańskiej, która w niektórych przypadkach dopuszczała wtargnięcie elementów ruskich, a w innych – stawiała opór wpływowi języka mówionego na język książkowy”. (Успенский, 2002, s. 80) Przy tym wpływ staro-cerkiewno-słowiański na język staroruski nie był niczym ograniczony, ponieważ dla języka staroruskiego w tym czasie nie istniały żadne normy kodyfikacyjne.

Ruś Kijowska jako państwo staroruskie obejmowała rozległe tereny, które w XIII wieku zostały podbite przez Złotą Ordeę. Następnie zachodnie

ziemie ruskie stopniowo stały się częścią Wielkiego Księstwa Litewskiego i Rzeczypospolitej, a wschodnie zaczęły się łączyć pod władzą Moskwy. Tak powstały dwa centra języka staro-cerkiewno-słowiańskiego redakcji ruskiej: wschodni w Moskwie i zachodni w Kijowie. Wymowa i gramatyka języka staro-cerkiewno-słowiańskiego w obu tych ośrodkach były takie same, ale style utworów oryginalnych i przekładowych znacznie się różnią.

Różnice w sytuacji językowej na Rusi Moskiewskiej i na Rusi Południowo-Zachodniej są spowodowane rozgraniczeniem politycznym i kulturowym dwóch części jednego niegdyś państwa. „Podczas gdy na Rusi Moskiewskiej funkcjonuje jeden język literacki (język staro-cerkiewno-słowiański redakcji wielkoruskiej), na Rusi Południowo-Zachodniej współistnieją dwa języki literackie: jednocześnie z językiem staro-cerkiewno-słowiańskim (w specjalnej redakcji południowo-zachodnio-ruskiej) w tej funkcji występuje tak zwana «prosta» lub «ruska mowa»”. (Успенский, 2002, s. 388)

Podstawę „prostej mowy” stanowił język urzędowo-kancelaryjny Rusi Południowo-Zachodniej, oficjalnie uznany za język postępowania sądowego najpierw w Wielkim Księstwie Litewskim, a następnie i w Rzeczypospolitej. Ten język stopniowo stracił funkcje języka kancelaryjnego i stał się językiem literackim, normowanym na poziomie ortografii oraz morfologii. W ten sposób równoległe z językiem staro-cerkiewno-słowiańskim powstał język literacki nowego typu, który był organicznie powiązany z żywą mową i dlatego podlegał ciągłej ewolucji. Zatem na Rusi Południowo-Zachodniej miało miejsce charakterystyczne przeciwstawienie języka staro-cerkiewno-słowiańskiego „prostej mowie”.

Taka sytuacja językowa na Rusi Południowo-Zachodniej „kalkuje dwujęzyczność łacińsko-polską w Polsce. Jako funkcjonalny odpowiednik łaciny występuje tu język staro-cerkiewno-słowiański, a jako funkcjonalny odpowiednik polskiego języka literackiego – «prosta mowa». W miarę kształtowania się polskiego języka literackiego, języki łaciński i polski używane były równoległe, przy czym język polski stopniowo wypierał łacinę. Dokładnie to samo zjawisko widzimy na Rusi Południowo-Zachodniej, gdzie «prosta mowa» stopniowo wypiera język staro-cerkiewno-słowiański, pozostawiając mu jedynie funkcję języka liturgicznego”. (Успенский, 2002, s. 392)

Po unii brzeskiej z 1595 roku, która spowodowała znaczne pogorszenie sytuacji ludności prawosławnej w Rzeczypospolitej, język staro-cerkiewno-słowiański został wyrugowany ze sfery życia publicznego. Jednak wzrosła jego rola w walce zachowanie tożsamości prawosławnej. W tym czasie, w związku z zagrożeniem utraty świadomości narodowej, język staro-cerkiewno-sło-

wiański na Rusi Południowo-Zachodniej staje się sztandarem walki o prawosławie i o ruską kulturę duchową.

Kluczową rolę w tym ruchu odegrała działalność prawosławnego wojewody kijowskiego księcia Konstantego Ostrogskiego, który stworzył słynne kolegium, nazywane czasem akademią. W drukarni tego kolegium w roku 1581 została wydrukowana przez Iwana Fiodorowa tak zwana Biblia Ostrogska – pierwsze pełne wydanie wszystkich ksiąg Pisma Świętego w języku staro-cerkiewno-słowiańskim. Biblia Ostrogska odegrała wyjątkową rolę w zachowaniu języka staro-cerkiewno-słowiańskiego jako sakralnego i literackiego nie tylko na Rusi Południowo-Zachodniej, lecz także na Rusi Moskiewskiej. To właśnie na podstawie Biblii Ostrogskiej w 1751 roku w Rosji opracowano Biblię Elżbietańską, a później drukowano także nowsze wydania Pisma Świętego w języku staro-cerkiewno-słowiańskim. (Мельков, 2011, s. 147-148)

Na przełomie XVI i XVII wieku najpierw we Lwowie i Wilnie a potem i na całej Rusi Południowo-Zachodniej tworzone były liczne bractwa prawosławne (Флоровский, 1937, s. 40-42), które zajmowały się rozpowszechnianiem edukacji kościelnej i przygotowaniem nauczycieli dla szkół prawosławnych. W tych szkołach język staro-cerkiewno-słowiański był świadomie używany jako środek komunikacji ustnej na tych samych zasadach, co i łacina w polskich szkołach katolickich.

Począwszy od lat 90-tych XVI wieku przy bractwach we Lwowie, Wilnie, Kijowie, Ostrogu, Łucku i Mohylewie pojawiają się drukarnie. Wydawano w nich literaturę polemiczną, antyunijną oraz szkolno-edukacyjną w języku staro-cerkiewno-słowiańskim. Były to przede wszystkim gramatyki i słowniki. Wśród nich należy wymienić „Bukwar” Iwana Fiodorowa z 1584 roku – pierwszy elementarz wschodniosłowiański, gramatykę grecko-słowiańską „Adelfotis”, która została wydana w 1591 roku przez Bractwo Lwowskie, „Gramatykę” Ławrentija Zyzanija z 1596 roku i słynną „Gramatykę” Melecjusza Smotryckiego z 1619 roku.

Tak więc na początku XVII wieku ruska tradycja staro-cerkiewno-słowiańska istniała równolegle w dwóch ośrodkach – w Moskwie i w Kijowie. Jednak już pół wieku później, gdy Ukraina weszła w skład Carstwa Moskiewskiego, sytuacja językowa panująca wcześniej na Rusi Południowo-Zachodniej rozprzestrzeniła się na gruncie wielkoruskim. „I to przeniesienie zmieniło radykalnie wszystkie aspekty funkcjonowania języka literackiego: rozszerza się stosowanie języka staro-cerkiewno-słowiańskiego, pojawiają się nowe opcje języka literackiego, opartego na mowie potocznej, zmienia się charakter interakcji języka kulturalnego z językiem codziennym”. (Успенский, 2002, s. 478)

Ten proces nie przebiegał bezboleśnie. Zapoczątkowane przez kijowskich teologów poprawianie moskiewskich ksiąg liturgicznych na sposób lwowski i kijowski wywołało oburzenie i sprzeciw wśród wielu wyznawców dawnej tradycji. Jednak „kijowska tradycja języka staro-cerkiewno-słowiańskiego pokonała moskiewską, wyparła do podziemia starowierców, zapanowała w Moskwie stając się odtąd tradycją ogólnoruską. Oczywiście tradycja kijowska sama uległa pewnym zmianom, zaadaptowała się do nowych warunków i przejęła pewne cechy tradycji moskiewskiej”. (Трубецкой, 1990, s. 131)

Tak więc cechy języka staro-cerkiewno-słowiańskiego Rusi Południowo-Zachodniej zostały przeniesione na grunt wielkoruski, co doprowadziło do powstania redakcji ogólnoruskiej tego języka. Proces ten został utrwalony dzięki poprawkom w księgach oraz tekstach liturgicznych dokonanych za czasów patriarchy Nikona.

Ogólnoruski język staro-cerkiewno-słowiański nie tylko pogodził w sobie tradycje kijowską i moskiewską, ale jeszcze objął tradycję południowosłowiańską, która przestała istnieć w wyniku podbojów osmańskich i utraty niepodległości przez narody Bułgarii i Serbii. Tak więc język staro-cerkiewno-słowiański w redakcji ruskiej począwszy od XVII wieku „stał się jedynym nośnikiem tradycji staro-cerkiewno-słowiańskiej jako język wszystkich słowiańskich kościołów prawosławnych. Od tego czasu Słowianie południowi w liturgii prawosławnej używają ksiąg w redakcji rosyjskiej ze wszystkimi cechami wymowy wielkoruskiej” (Трубецкой, 1990, s. 132), zaś państwo rosyjskie stało się głównym patronem tradycji cyrylo-metodiańskiej na całym świecie.

Rozważania na temat języka staro-cerkiewno-słowiańskiego w kontekście współczesności nasuwają myśl o wyjątkowym znaczeniu tego języka w historii, kulturze i życiu religijnym narodów słowiańskich. W dzisiejszych czasach język staro-cerkiewno-słowiański nadal niesie w sobie święty pierwiastek funkcjonując jako ikona słowna. Ten święty język Kościoła, odwołujący się do żywej tradycji cyrylo-metodiańskiej, zawiera w sobie tajemniczy sens i Boskie piękno, będące wspólnym dziedzictwem i skarbem narodów słowiańskich. Dalszy ciąg badań naukowych nad językiem staro-cerkiewno-słowiańskim jest najważniejszym zadaniem, stojącym przed współczesnym pokoleniem naukowców.

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**Orientalne zaśpiewy w modlitwie Kresów.
Języki sakralne Ormian, Żydów, Karaimów i Tatarów**

**Oriental Traces in the Prayers of the Borderlines.
Sacral languages of the Armenians, the Jews, the Karaims
and the Tatars**

Abstrakt

Mniejszości narodowe, które zamieszkiwały wschodnie pogranicze państwa polsko-litewskiego, wniosły do kultury religijnej egzotyczne barwy Orientu. Obok dominujących wpływów łacińsko-polskich i bizantyńsko-ruskich w ciągu wieków współistniały tradycje sakralne Żydów, Ormian, Karaimów, Tatarów. Oprócz tradycyjnej łaciny i języka staro-cerkiewno-słowiańskiego mieszkańcy Kresów byli oswojeni z brzmieniem języka hebrajskiego, karaimskiego, arabskiego i grabara – liturgicznego języka Ormian.

Słowa kluczowe: *język sakralny, Ormianie, Żydzi, Karaimi, Tatarzy.*

Abstract

National minorities living on the eastern borderlines of the Polish-Lithuanian State enriched the religious culture with the exotic colors of the East. Alongside with the predominant Latin-Polish and Byzantine-Russian influence, the sacral traditions of the Jews, the Armenians, the Karaims and the Tatars were also established. The Latin and Old Slavic languages were the traditional languages of

the church service. But the borderline people gradually got accustomed to the sounds of Hebrew, Karaite and the Arabic language, as well as Grabar – the classical Armenian language of that liturgy.

Key words: *Sacral language, the Armenians, the Jews, the Karaites, the Tatars.*

Od wieków w wielkich religiach monoteistycznych: judaizmie, chrześcijaństwie, islamie funkcjonuje pojęcie języka świętego czy też sakralnego, tzn. języka w którym spisano księgi zawierające objawienie Boga. Ziemię wschodnie państwa polsko-litewskiego tradycyjnie określane jako ziemie kresowe uważa się za miejsce spotkania Słowiańszczyzny wschodniej i zachodniej, chrześcijaństwa katolickiego i prawosławnego, cywilizacji łacińskiej i bizantyńskiej. Jednak nie byłyby one tak mocno naznaczone bogactwem kultur, romantyzmem i poetycką inspiracją, gdyby nie większe lub mniejsze wtręty przyniesione z dalekich egzotycznych krajów, które w ciągu wieków stały się elementem rodzimej kultury. Mamy tu na uwadze przede wszystkim potężną kolonizację żydowską, która z biegiem lat opanowała obszerne połacie, przede wszystkim małomiasteczkowe, ziem kresowych, ale także i stopniowo polszczyły się żywioł ormiański, jak też bardziej hermetyczne i marginalne oazy karaimejskiej czy też tatarskiej obecności. Przybyłszy z dalekiego Orientu zachowywali własną tożsamość dzięki kultywowaniu tradycji religijnej. Obok chrześcijan Ormian początkowo ortodoksyjnych, a potem unickich katolików rozwijała się religia starotestamentowa, którą przy zachowaniu specyficznych odmienności dzielili między sobą Żydzi i Karaimi, znaleźli też miejsce dla siebie zawsze wierni wielkim księżętom litewskim a potem królom Rzeczypospolitej tatarscy wyznawcy islamu.

Ormianie to naród pochodzenia indoeuropejskiego, który osiadł na ziemiach leżących między Morzem Kaspijskim a Eufratem i dorzeczem rzeki Halia. Mały, lecz bogaty w zasoby naturalne kraj będący pomostem pomiędzy Wschodem a Zachodem, leżał pomiędzy wielkimi potęgami. Persowie, Rzymianie, Bizantyjczycy, Arabowie, Turcy, Rosjanie chcieli podporządkować sobie państwo ormiańskie. Niejednokrotnie i na dłuższy czas Armenia traciła swoją niezależność. Uciski ze strony kolejnych zaborców, którzy nie rzadko dążyli do podporządkowania a nawet unicestwienia Ormian, zmuszały ten naród do migracji.

Jedna z kolejnych fal ucieczki Ormian z ziemi ojczyściej przypada na połowę XI wieku, kiedy to po zdobyciu przez Turków Seldżuków stolicy Armenii miasta Ani tysiące Ormian szukając schronienia osiedliły się na Kry-

mie, w Trapezuncie oraz grodach mołdawskich i ruskich. (Pełczyński, 2014, s. 65) Na Rusi Ormianie pojawili się po 1080 roku. Następni uciekinierzy z Armenii przybywali na ziemie ruskie w XII i XIII wiekach. Książęta ruscy życzliwie odnosili się do nich. Po przyłączeniu Rusi Halicko-Włodzimierskiej do Polski w XIV w. Ormianie stali się poddanymi polskich władców. Nigdy liczebność diaspory ormiańskiej na ziemiach Rzeczypospolitej nie była zbyt duża. W XVII w. Ormian było nie więcej niż 3000. Ośrodkiem Ormiańskiej diaspory był Lwów. Król Kazimierz Wielki nadał im przywilej potwierdzający ich samorząd sądowniczy oraz odrębność wyznaniową. (Gawlik, 1988, s. 9; Marcinek, 2006, s. 62) Ormianie zamieszkiwali przede wszystkim Lwów oraz Kamieniec Podolski, Bar, Tyśmienicę, Podhajce, Złoczów, Zamość, Łuck, od XVII w. – Żwaniec, Brody, Buczacz, Brzeżany, Śniatyn, Jazłowiec, Łysiec, Stanisławów, zaś od XVIII w. – Kutry, Bałte, Raszków, Mohyłow Podolski, w niektórych okresach – Lublin, Warszawę czy Poznań. (Pełczyński, 2014, s. 65)

Ormiańscy przybysze posługiwali się językiem kipczackim, którego się nauczyli w czasie zamieszkiwania na półwyspie Krymskim, skąd przybyli na ziemie Rusi Zachodniej. (Stopka, 2014, s. 38-39) Ormianie przyswajali języki krajów, w których mieszkali, a więc między innymi polski i ruski. Z czasem, w trakcie integracji ze społeczeństwem polskim, ich głównym językiem stał się polski. (Pełczyński, 2014, s. 71)

Armenia była pierwszym chrześcijańskim państwem na świecie. W 302 roku św. Grzegorz Oświeciciel ochrzcił króla Tirydatesa III. Duchową stolicą Ormiańskiego Kościoła Apostolskiego został Eczmiadzyn w Armenii, gdzie rezydował patriarcha ormiański. W utwierdzeniu nowej religii św. Grzegorzowi pomagali misjonarze greccy i syryjscy, dlatego też msza święta w Armenii odprawiana była w językach greckim i syryjskim. Liturgia ormiańska należy do najstarszych na świecie. Dzięki działaniu słynnej szkoły tłumaczy, której założycielem był uczony kapłan św. Mesrob Masztoc, powstała liturgia mszalna w tzw. grabarze – klasycznym języku ormiańskim. (Kajetanowicz, 1938, s. 4-5) Mesrob Masztoc, którego uważa się za ojca literatury ormiańskiej, urodził się w 361 lub 362 roku. Był on jednym z urzędników na dworze królewskiej dynastii Arsakydów oraz znanym działaczem państwowym i wojskowym. Potem Masztoc porzucił dworską służbę i stał się kaznodzieją chrześcijańskim. Jeszcze podczas służby na dworze zrodził się w nim pomysł stworzenia ormiańskiego alfabetu. W czasie działalności misyjnej w Hochtn Mesrob szczególnie dotkliwie odczuwał brak literatury chrześcijańskiej w języku narodowym. W tym czasie kazania wygłaszano w języku syryjskim i greckim, niezrozumiałych dla ogółu ludności. Pomysł stworzenia alfabetu ormiańskiego poparł król Armenii Wramszapuch oraz katolikos Saak Partew. Alfabet, odmienny od zna-

nych w tych czasach alfabetów, powstał w 405 roku i zachował się do dzisiaj. Miał 36 liter i całkowicie wyrażał system fonetyczny języka ormiańskiego.

Św. Mesrob wraz ze swoimi uczniami zaczął prowadzić niesamowicie ważną działalność oświeceniową. W miastach, klasztorach w całym kraju otwierano szkoły, w których nauczano w języku ormiańskim. Mesrob Masz-toc stał się pierwszym w Armenii wardapetem, tzn. nauczycielem, oświeci-cielem. W okresie utrwalenia się chrześcijaństwa na ziemiach ormiańskich było szczególne zapotrzebowanie na teologiczne i kościelne księgi w języku zrozumiałym dla wiernych.

O bogactwie i doskonałości *grabara* – staroormiańskiego języka literac-kiego, który był też językiem mówionym, świadczy fakt, iż po stworzeniu al-fabetu możliwe było tłumaczenie Pisma Świętego, antycznej i wczesnochrze-ścijańskiej literatury. (*Изобретение армянского...*) Powstały w 428 roku przekład Biblii (w grabarze *Astwacaszuncz* – Natchniona) na język staro-ormiański XIX-wieczny historyk chrześcijaństwa R. Kornelli nazywał pracą „upiększoną pochwałami” cudzoziemców, angielski badacz Konibir pisał, że ormiańskie tłumaczenie Nowego Testamentu jest doskonale ze względu na piękno języka, doskonałość tłumaczenia i wierność w stosunku do orygina-łu. Wybitny francuski znawca Wschodu Maturen de La Croz nazywał je „królową tłumaczeń” (*La Reine des Versions*). (*Армянская культура...*).

W stosunkowo krótkim czasie na *grabar* przetłumaczono utwory Ojców Kościoła: Bazylego, Grzegorza z Nyssy, Grzegorza z Nazjansu, Jana Chry-zostoma, Efrema, Atanazego z Aleksandrii, Cyryla z Aleksandrii i wielu in-nych. (*Изобретение армянского...*) Wiele utworów wczesnochrześcijańskiej literatury zachowało się tylko dzięki istnieniu ich tłumaczeń na język staro-ormiański.

W 1630 roku z inicjatywy byłego katolikosa Melhizedeka doszło do za-warcia unii Kościoła Ormiańskiego w Polsce z Rzymem i został utworzony Ormiański Kościół Katolicki. Unię zawarł młody arcybiskup Lwowa Miko-łaj Torosowicz. Zarówno w nowo powstałym Kościele, jak i w Ormiańskim Kościele Apostolskim językiem liturgii i piśmiennictwa religijnego został kla-syczny ormiański język z V w. – *grabar*. (Pelczyński, 2014, s. 72)

W miarę rozwoju i upowszechniania się polszczyzny w społeczeństwie polskim w okresie po Kontrreformacji, po wprowadzeniu wraz z polskim tłumaczeniem Pisma Świętego języka polskiego do życia religijnego, rozbu-dowaniu nabożeństw paraliturgicznych, śpiewów itd., sfera sakralna unickich Ormian również uległa przemożnym wpływom języka polskiego.

W ciągu stuleci w Europie ukształtowały się także dwie wspólnoty dia-sporowe Żydów – aszkenazyjska i sefardyjska. Różniły się między sobą ele-

mentami kulturowymi, m.in. liturgią, językiem, jednak zawsze jednoczyło je używanie języka hebrajskiego jako języka sakralnego. W języku tym modlono się, w nim była napisana Biblia oraz jej komentarze. Żydzi aszkenazyjscy, którzy rozmawiali w języku jidysz (powstał on na terenach niemiecko-słowiańskich w Średniowieczu), osiedlali się m.in. na ziemiach litewskich i polskich. Pierwsze historyczne wzmianki o Żydach na ziemiach Polskich pochodzą z XI w. Osadnictwo żydowskie odbywało się w kilku falach, na przykład w czasach wypraw krzyżowych (1096-1147) Żydzi narażeni byli na prześladowania. Wędrując do Ziemi Świętej Krzyżowcy mordowali i grabili Żydów, którzy zmuszeni byli do ucieczki z Niemiec. Schronienie znaleźli m.in. w Polsce. W czasach tzw. „czarnej śmierci” Żydów prześladowano, ponieważ oskarżano ich o zatrutowanie studni i celowe roznoszenie chorób zakaźnych wśród chrześcijan. Uciekinierzy osiedlali się przede wszystkim w Wielkopolsce, na Śląsku i w zachodnich częściach Małopolski.

Powstająca w Polsce diaspora żydowska była wspólnotą różniącą się od reszty katolickiej kraju pod względem religijnym. Przez wieki utrwalił się stereotyp mieszkających obok siebie żydów i katolików. Wyraz „żyd” obok wymiaru narodowego posiadał też treść religijną. Był to ktoś inny niż katolik, niż chrześcijanin, ktoś zamknięty w hermetycznym getcie, przede wszystkim getcie religijnym.

Przywiązanie ściśle, wręcz fanatyczne do „liter” zasad wiary starotestamentowej było warunkiem przetrwania wspólnot żydowskich w diasporze. Kurczowo trzymano się tradycyjnych, archaicznych, niezrozumiałych ponieważ form rodzimej religii. Wymiernym symbolem tej tradycji był starotestamentowy język hebrajski. Mimo że zapomniany i nieużywany powszednie był on swoistym znakiem rozpoznawczym przynależności do religii żydowskiej. Używany tylko do celów liturgicznych pozostawał niezmiennym i trwałym ogniwem łączącym gminy żydowskie na terenie Rzeczypospolitej, jak też innych krajów. W edukacji Żydów polskich przywiązywano wielką wagę do znajomości języka hebrajskiego. Oto jak wyglądały tradycyjne zajęcia w żydowskiej szkole religijnej *chederze*: „w chederze gwarno i wesoło. Przy jednym końcu długiego stołu belfer uczy abecadła hebrajskiego z modlitewnika: dzieci powtarzają głośno: «Patach alef – a, patach bejt – ba, patach gimel – ga, patach dalet – da» ...wtm wchodzi żona mełameda. Zapala lampę, a pokój zapełnia się światłem. Chłopcy trą sobie oczy, olśnione nagłym blaskiem światła. Minęła trwoga, cudowne bajki przysły. Po chwili podchodzi mełamed i belfrzy. Zaczyna się znowu nauka. Dzieci usadawiają się według „grup”: gdy jedna grupa kończy naukę z mełamedem, przesuwa ją chłopcy do końca stołu, a ich miejsce zajmuje następna grupa. Belfrzy siedzą u brzegu stołu

i powtarzają z dziećmi. W chederze panuje wielki gwar: uczniowie, mełamed i belfrzy czytają głośno chórem z ksiąg Biblii i tłumaczą każde słowo hebrajskie na język żydowski”. (Tauber, Waingarten, 1933, s. 10, 12-13)

Wśród Żydów żyło przekonanie, że język hebrajski miał szczególną moc oświecającą. Religijni Żydzi mówili o języku hebrajskim, że to *laszon hako-desz* – język święty, ponieważ zapewnia świętość duszy. (Duda, 2014) Język hebrajski, mimo iż był zarezerwowany dla obszarów życia liturgicznego, nie był językiem martwym, wyobcowanym z życia powszedniego oświeconych elit żydowskich. Podobnie jak łacina u chrześcijan, również hebrajski był językiem uczonych i językiem urzędowym kahałów. Nawet w akademii krakowskiej za czasów piastowskich była katedra języka hebrajskiego. (Shall, 1926, s. 54) Obszar życia religijnego Żydów był bardzo rozbudowany, ściśle powiązany z życiem rodzinnym. W miarę asymilacji i polszczenia się również język polski częściowo wypełniał powszednie rytuały religijne. Dotyczy to praktyk związanych ze świętowaniem dnia sobotniego w rodzinach, czytania psalmów i Pisma Świętego.

Karaimi – ludność pochodzenia tureckiego wyznająca *karaimizm* przybyła na ziemię Wielkiego Księstwa Litewskiego i Ruś Czerwoną z Krymu. Na Rusi, najprawdopodobniej w Kijowie, gminy karaimskie istniały już od XI w. Według źródeł około 1246 roku z miast krymskich Mangup, Sołchat, Kaffa do Halicza przybyło 80 rodzin karaimskich. Na ziemię litewskie wyznawców karaimizmu miał sprowadzić książę Witold w celu obrony przed krzyżakami. Jednak prawdopodobnie gmina karaimska w Trokach istniała już za czasów panowania księcia Kejstuta i księcia Olgerda. (Tyszkiewicz, 2012, s. 12-23) Karaimi mieszkali w Trokach, Kownie, Poniewierzu, Poswołu, Sałatach, Birżach, Wiłkomierzu, Krakinowie, Łucku, Derażnem, Ołyce, Haliczu, Lwowie i td. (Szyszman, 1936, s. 3-4; Sulimowicz, 2010, s. 151-152) Społeczność karaimska była jedną z najmniej licznych mniejszości religijno-etnicznych na terenach dawnej Rzeczypospolitej. Dość często ludność karaimska przez urzędników państwowych była mylona z Żydami, dlatego trudno określić dokładną jej liczbę na tych terenach. (Gąsiorowski, 2012, s. 25) Dopiero pierwszy prawie powszechny spis ludności ukazuje, że liczebność karaimskiej populacji w Rzeczypospolitej w połowie XVIII wieku wynosiła około 700 osób. Według innych danych było ich około 5-6 tys. (Gąsiorowski, 2012, s. 12-13)

Językiem ojczystym Karaimów rusko-litewsko-polskich był język karaimski, należący do kipczackiej grupy języków tureckich. (Nemeth, 2012, s. 53) Głównie dzięki stałym kontaktom z ziemią macierzystą na Krymie Karaimom udało się przetrwać, zachować swoją tradycję religijną i językową. Ludność karaimska wyznawała karaimizm – religię monoteistyczną wywo-

dzącą się z judaizmu, mającą wspólne wątki z islamem i chrześcijaństwem. Pojęcie karaimizm pochodzi od hebrajskiego „karai”, co znaczy „czytający”. Uważa się, że twórcą karaimizmu był Anan ben Dawid (700-765), erudyta, człowiek wysoko wykształcony, który nawoływał „Badajcie Pismo Święte; w niem jedynie szukajcie Prawd Bożych! Nie hołdujcie ślepo autorytetom”. Anan nauczał, że każdy może zgłębiać i wyklądać Pismo Święte posługując się swoimi zdolnościami, ponadto badacza nie łączą żadne powiązania z poprzednikami tj. poprzednimi nauczycielami nie wyłączając jego samego. (Mardkowicz, 1930, s. 6-8) Przy karaimskich świątyniach (*kienesach*) obowiązki kapłańskie pełnili *hazani* (starsi i młodszy), a najwyższą władzę duchowną sprawował *hachan*. (Mardkowicz, 1930, s. 14)

Wśród Karaimów potrzeba zgłębiania języka hebrajskiego narodziła się wraz z obowiązkiem indywidualnego poznawania Pięcioksięgu, który spisany był w owym języku, a korzystanie z wersji przetłumaczonej mogło powodować pewne niezgodności, gdyż tekst tłumaczony stawał się w pewien sposób interpretacją tłumaczącego, co z oczywistych powodów nie mogło być zaaprobowane. Mimo to Tora w całości była przetłumaczona i udostępniona wiernym. Tak więc wszyscy mężczyźni (kobiety nieobowiązkowo) musieli uczyć się hebrajskiego już od wieku dziecięcego, dlatego też w odróżnieniu od innych społeczności, w których te studia były zarezerwowane tylko dla wyższych warstw, Karaimowie znali język hebrajski.

Ciekawa jest liturgia i obrządek karaimski, który wyróżnia się przepychem, bogactwem i różnorodnością modlitw, psalmów, hymnów religijnych. Sam tekst Pięcioksięgu odczytywany był w języku hebrajskim, następnie fragmentami powtarzany w języku karaimskim, w którym była odmawiana reszta modlitw. (Pilecki, 2012, s. 37) Karaimscy uczeni pozostawili po sobie dość bogate teologiczne i liturgiczne piśmiennictwo w języku hebrajskim, ponieważ dla Karaimów pierwszym językiem liturgii oraz nauki był język hebrajski. (Nemeth, 2012, s. 58)

Początek osadnictwa Tatarów na ziemiach Wielkiego Księstwa Litewskiego przypada na koniec XIV wieku, jeszcze przed powstaniem Chanatu Krymskiego (1449), zaś na ziemiach polskich na XVII w. Tatarzy osiedlali się przeważnie w okolicach Wilna, Kowna, Trok, Grodna, na Wołyniu, Podolu i Suwalszczyźnie. Walki wewnętrzne w nowo powstałym państwie Girejów zmuszały przedstawicieli obozu pokonanego do ucieczki do innych krajów, w tym na Litwę lub ziemie Korony. (Tyszkiewicz, 2010, s. 133) Część osiedlonych Tatarów stanowili również jeńcy wojenni. Tatarzy, albo jak ich nazywano Lipkowie, byli wierni swojej nowej ojczyźnie. Służyli w wojsku litewskim, brali na przykład czynny udział w bitwie pod Grunwaldem u boku księcia Witolda. Gdy

w 1506 roku Chanat Krymski nawoływał ich do zdrady, odpowiedzieli: „Ani Bóg, ani Prorok nie każą wam rabować, a nam być niewdzięcznymi. Pokonując was zabijamy łupieżców, a nie braci naszych!”. (Podhorodecki, 1987, s. 278-279, 282) Ziemie Chanatu Krymskiego były ubogie i przeludnione, dlatego też Tatarzy chętnie osiedlali się na ziemiach Rzeczypospolitej, które dla nich były krajem bogatym, pełnym żyznych gleb i obfitych plonów.

Polska tolerancja religijna XVI wieku sprzyjała osadnictwu Tatarów. W tych czasach w Rzeczypospolitej istniało około 400 meczetów. (*Kim są polscy Tatarzy...*)

Osadzając Tatarów w swoich włościach książę Witold darował im nie tylko ziemię, ale także wolność religijną. Horacjusz Spanocchi, sekretarz nuncjusza Bolognetiego pisał w 1586 roku: „W Wilnie obok kościołów katolickich wznoszą się tu zbory protestanckie i cerkwie prawosławne, a w pobliżu stolicy (na Łukiszkach) również i meczety, w których pozwala się muzułmanom sławić Allacha”. (Konopacki, s. 72) Z przybyciem na ziemię Wielkiego Księstwa Litewskiego zakonu jezuitów w 1570 roku sytuacja się nieco zmieniła. Podejmowano próby chrystianizacji Tatarów. Jedną z takich prób było rozpowszechnianie modlitewników stworzonych z myślą o Tatarach żyjących w państwie polsko-litewskim. Oprócz tekstu w językach orientalnych (arabskim i tureckim) na drugiej połowie strony umieszczano polskie tłumaczenie tekstu. Być może takie zestawienie miało u nich wywołać skojarzenie z Koranem. Prawdopodobnie czytając o Chrystusie w świętym dla nich języku arabskim mieli dojść do wniosku, że przejście na chrześcijaństwo w zasadzie nic nie zmieni. Ostatecznie zrezygnowano z prób chrystianizacji Tatarów przewidując znikomy efekt tych zabiegów. (Konopacki, s. 73-74)

Lipkowie byli wyznawcami islamu obrządku sunnickiego. Jako muzułmanie mieli obowiązek pięciornazowej modlitwy w ciągu doby. Meczet był miejscem przeznaczonym wyłącznie do modlitwy, pozostałe ceremonie, jak śluby, chrzciny, pogrzeby odbywały się poza nim. Modlitwy w islamie zawierają między innymi wersety koraniczne i recytowane są w języku arabskim, języku Objawienia, ale modlitwy osobiste mogą być odmawiane w języku ojczystym. Arabski język literacki jest językiem liturgicznym islamu. Język Koranu (VII w.) jest starszą wersją języka arabskiego sprzed ukształtowania się normy literackiej w VIII w. i różni się od języka literackiego w wielu aspektach. To właśnie język Koranu jest naprawdę klasycznym językiem arabskim. Koran objawiony w języku arabskim nie może być przetłumaczony na inne języki. Każde tłumaczenie Koranu jest tylko nieudolną interpretacją, której nie można uznać za święte słowo Allacha. Recytacja świętej księgi islamu w czasie modlitwy może odbywać się wyłącznie w języku

arabskim. Tyko arabski koraniczny oddaje pełnie znaczenia tej świętej księgi islamu (Nalborczyk). Język arabski bardzo mocno dowartościowywał sam prorok Muhammad. W Hadisach mówił: „Kochajcie Arabów z trzech powodów: ponieważ ja jestem Arabem, ponieważ Koran został objawiony w języku arabskim i ponieważ arabski jest językiem mieszkańców raju”. (Łapicz, 2017, s. 193) Muzułmanie wierzą, że przed końcem świata Koran zostanie zabrany do nieba a na ziemi zostanie tylko pusty papier. Liczne pisma Tatarów zamieszkujących Wielkie Księstwo Litewskie przepowiadają to wydarzenie, m.in. wspomina się o tym dwa razy w tzw. Kitabie Milkamanowicza: „[...] w roku tysiąc dwieście dwudziestym Koran święty [...] do nieba zostanie zabrany, jego pismo zniknie a zostanie tylko czysty papier; za lat trzydzieści z Koranu zostanie zabrane pismo, pozostanie tylko pusty papier”. (Łapicz, 2017, s. 193-194)

W islamie nie ma hierarchicznej władzy ani kapłanów, więc modlitwę prowadzi osoba wykształcona, znająca Koran, wybrana przez wspólnotę (*Jak się modlą*). Litewsko-polscy Tatarzy nie rozumieli języka arabskiego, który był używany podczas muzulmańskich nabożeństw, jednak odnosili się z wielkim pietyzmem i pobożnością do ksiąg napisanych w tym języku. (Podhorodecki, 1987, s. 281) Nauczanie czytania arabskich tekstów Koranu i pisania alfabetem arabskim odbywało się w specjalnych szkołkach. W większych koloniach Tatarów nauka obywatela się codziennie rano i popołudniu, w mniejszych – tylko w niedzielę. Takie szkoły znajdowały się m.in. w Nowogródku, Słonimiu, Sokółce, Kruszynianach, Wasiliszkach itd. (Kryczyński, 1938, s. 211, 217) W drugiej połowie XVI w. kontakty Tatarów z ziemią ojczyzną stopniowo słabły, co powodowało zanikanie wśród nich języka tatarskiego. (Podhorodecki, 1987, s. 281) Zaczęli oni posługiwać się językami, które funkcjonowały w ich nowej Ojczyźnie, a mianowicie polskim, białoruskim, ruskim. Teksty muzulmańskich ksiąg religijnych, np. kitabów, tedźwidów, chamailów, daławarów powstawały już w językach słowiańskich, lecz zapisanych alfabetem arabskim (Łapicz, 2017, s. 197).

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**Grief, dogs and disillusioned writers
in the modern prose elegy *The Friend* by Sigrid Nunez**

**Żałoba, psy i rozczarowani pisarze we współczesnej
elegii prozą *Przyjaciel*, autorstwa Sigrid Nunez**

Abstract

The paper analyses the themes of mourning, literature and people-animals relationship in *The Friend* by Sigrid Nunez. It also discusses how the novel conforms to and diverges from certain elegiac conventions. The argument put forward is that by preserving some of these conventions and distorting others the novel becomes a modern elegy in prose, which is characterised by preoccupation with loss. The loss, however, is not only personal but has a more general, all-encompassing character.

Key words: *mourning, literature, animals, Sigrid Nunez, elegy.*

Abstrakt

Artykuł analizuje motywy żałoby, twórczości literackiej i relacji pomiędzy zwierzętami i ludźmi w powieści *Przyjaciel* Sigrid Nunez. Przedstawia zbieżności i odstępstwa od tradycyjnych konwencji elegijnych. Tezą artykułu jest stwierdzenie, że trzymając się niektórych konwencji, a inne zmieniając, powieść staje się współczesną elegią prozą, którą charakteryzuje poczucie straty. Strata nie jest jedynie osobista, ale ma charakter bardziej ogólny i obejmuje wiele aspektów rzeczywistości.

Słowa kluczowe: *żałoba, twórczość literacka, zwierzęta, Sigrid Nunez, elegia.*

The Friend by Sigrid Nunez takes as its main themes, grief following the death of a friend, the reflection on our relationship with the animal world, specifically dogs, and the nature of writing. Nunez intertwines these three themes in such a way that they become inseparable. I will be trying to make a point that Nunez's novel follows some elegiac conventions and transforms others becoming a modern elegy. I will draw on the ideas outlined in David Kennedy's comprehensive study of the genre titled *Elegy*, in which he traces its origins, development over the centuries as well as its modern manifestations, and *The Prose Elegy: an Exploration of Modern British and American Fiction* by John B. Vickery which sheds light on how the elegy seeps into prose genres.

Although Nunez has been publishing novels and reviewing books for over twenty years, it is *The Friend* that has attracted the most attention. The novel won the National Book Award for fiction in 2018 and became The New York Times Bestseller; Nunez's craftsmanship and subtlety resonated both with critics and the general public. *The Friend* is an amalgam genres: the novel, elegy, memoir and essay. What sets the plot in motion is the narrator's loss of a writer friend to suicide. The novel affords a precious glimpse into the hermetic literary world with its squabbles and thwarted ambitions. Additionally, Nunez examines a complicated relationship between animals and humans. A catalyst for these considerations is a cumbersome inheritance from the narrator's late friend, a big dog called Apollo; the only major character in the novel that has a name. The book starts after the narrator learns about her friend's death and the plot moves in a nonlinear fashion containing numerous reminiscences of the past. The main storyline covers approximately a year after the friend's death and in flashbacks records the friendship spanning several decades.

Grief can take numerous forms and it is crucial to establish the difference between lamentation and elegy as manifestations of grief. The former, as defined by Rebecca Saunders, is primarily oral, public and performative. It is a communal expression of grief refusing consolation, whereas the elegiac voice is individual and private. (Saunders, 2007, p. 49) The elegy is defined in general terms as "an elaborately formal lyric poem lamenting the death of a friend or public figure, or reflecting seriously on a solemn subject". (Baldick, 2001, p. 76) The distinction between lamentation and the elegy is also that of gender. Lamentation is associated with women, while the elegy is "historically a form written by men and about men". (Saunders, 2007, p. 51) In the case of Nunez's novel we are dealing with an elegy in prose written by a woman writer for her friend, a man – another writer. Such a situation

seems to be out of keeping with the conventions of the genre, but these, as David Kennedy in his book “Elegy” points out “no longer seem as settled as they once did”. (Kennedy, 2007, p. 11) With regard to the sex of the elegist, *The Friend* is a modern elegy reworking the genre conventions.

The elegy is traditionally a poetic genre but prose works and films also contain elegiac temper. This quality has been becoming more and more apparent since the twentieth century, which saw major armed conflicts as well as other political and cultural transformations and had to deal with their aftermath. John Vickery notices that modern elegy is not only the mourning of the death of an individual in a poem but it can also deal with other losses in a work of fiction, “This climate has consequently been reflected in a broad range of individual texts that lament, confront, and assess the sorts of consolation currently available to the range of losses commanding the attention of the modern world and reader”. (Vickery, 2009, p. 164) Loss has always been inherent in human existence but the changes in all spheres of life (political, cultural, sociological) in the last century have made it even more apparent, and loss as a theme features in many genres. The sociological change that the process of mourning has been undergoing is that its public part is reduced to the minimum, therefore, as James Brown notices, “we moderns are cut off from the sustaining power of ritualized myth”. (Brown, 2015, p. 189) More than ever before, mourning has become a private affair, which is also the case in Nunez’s novel, and the narrative voice is also the solitary voice of the elegist.

The first element of the elegy is the declaration of sorrow. The traditional elegy is a male genre and it is customary for the elegist to control his emotions. Stereotypically, the opposite holds true for women. “It is in women’s natures to weep at even the natural order of things,” states Kennedy in his study of the elegy. (Kennedy, 2007, p. 28) Such a lack of restraint is incompatible with the genre conventions. Uncharacteristically, in *The Friend* we are dealing with a female elegist who allows herself to weep for days. Vickery makes a point that the declaration of sorrow in modern prose elegies is kept to the minimum and there are no elaborate obsequies and outpouring of emotions. (Vickery, 2009, p. 4) This observation partially holds true for *The Friend*. Although the narrator admits that she cried for days after learning about her friend’s death, the account of this stage of mourning takes just a few lines in the novel. Her declaration of personal grief is quite succinct, “I was lying down, it was the middle of the day, but I was in bed. All the crying had given me a headache, I’d had throbbing headache for days. I got up and went to look out of the window, there was a draft. [...] I thought of the women who’d cried themselves blind. I blinked and blinked, fear ri-

sing. Then I saw you". (Nunez, 2018, p. 9) The above passage is undeniably the depiction of extreme sorrow but after just a few sentences the narrator goes off on a tangent about her friend's walking habits. What is more, the reference to the women who cried themselves blind directs the reader back to a story recounted at the beginning of the novel, which, incidentally, was the last thing the narrator and her friend discussed. It is the story of Cambodian women's plight. Having lost their families in the war, they could not stop crying for years and were subsequently afflicted with some kind of psychosomatic blindness. Metaphorically speaking, after the horrors they had gone through, they could not look at the world anymore. Considering the profession of the main character, it is perhaps unsurprising that at the very beginning of the novel personal grief is mediated through the tale of another person's life. The narrator is scared she could be struck by blindness and stops crying, which could be interpreted as the decision to end the withdrawal from total isolation.

Another element of the initial part of elegy is registering the death by the public world, i.e. the funeral ceremony. In accordance with his wishes the friend is cremated with no funeral and the obituary clearly states his atheism. However, disregarding his disgust at memorials, one is organized. It is not particularly solemn and, apart from a slideshow, it is like any get-together. The participants entertain themselves with jokes and gossip about the deceased which makes the event not much different from any other literary gathering, "People mingling at the reception were heard talking about money, literary prizes as reparations, and the latest *die* author, die review. Decorum in this instance meant no tears. People used the opportunity to network and catch-up". (Nunez, 2018, p. 11) The lack of gravity and pathos in the memorial scene is in keeping with Brown's observation about the modern reduction of the initial part of the elegy mentioned above. It is as if the direct expression of emotion was a faux pas in the literary world. Humour, irony and gossip are the tools used too distance oneself from uncomfortable feelings.

Interestingly, in spite of various deviations from the conventions of the genre, *The Friend* conforms to numerous elegiac traditions with respect to writers and writing established by the Greek poet Theocritus, the author of proto-elegies. For instance, in Theocritus's poem *First Idyll* Thyrsis, a shepherd poet sings of the death of another poet, Daphnis. (Kennedy, 2007, p. 13) This situation is mirrored in *The Friend*. Here, the writer also mourns the death of another writer. The literary world in novel is fiercely competitive which also gestures towards Theocritus' poem. In this idyll "the unnamed goatherd promises Thyrsis the prize of the cup if he can sing

'The Affliction of Daphnis' as well as he did in a recent contest with Chromis of Libya". (Kennedy, 2007, p. 13) The reader of Nunez's novel is often reminded that writing is a contest and struggle and one has to act ruthlessly to win. The literary dog-eat-dog world is depicted in the following way, "It's like a sinking raft that too many people are trying to get onto. So any push you can deliver makes the raft a little higher for you". (Nunez, 2018, p. 12) Contrary to the stereotype of a writer as a highly sensitive individual, the literary profession is not for the fainthearted. It is a brutal world of gossip and intrigue where success is short-lived and even strong predictors of success can lead to failure. One can be appreciated by the critics and win literary prizes but their book will not sell. One can be a talented up-and-coming writer with bright future ahead and suddenly find themselves unable to write. Not to mention the constant scrutiny of your work by other writers, critics and students of writing. All of this can result in a debilitating writer's block and depression.

The Friend highlights a number of important ideas for thinking about the creative process. One facet of writing is that it can be destructive and toxic. What is especially bewildering – it is authors themselves who cherish such a belief. At some point in the novel, the narrator quotes various writers and journalists such as Henry de Montherlant, Joan Didion and Janet Malcolm expressing hatred towards their own profession: writing is an aggressive, even a hostile act, a destructive addiction, an act of egotism and very much like prostitution. It is useless, shameful, immoral; writers are always selling somebody out and the list goes on. (Nunez, 2018, p. 41) Moreover, those who write are accused of being either narcissists with inflated egos or impostor syndrome sufferers fearing exposure as frauds. The destructive nature of writing is exemplified by a good number of writers who committed suicide, including the narrator's friend mourned in the novel. If they do not commit suicide, they drive their family members to suicide, presumably because of the pathological relationships in writers' families. Nunez provides a host of examples of writers who killed themselves: Virginia Woolf, Heinrich von Kleist as well as an unnamed poet who taught at the same university as the narrator. As for writers' family members and friends, the victims include the daughters of Rilke and Simenon or Flannery O'Connor's close friend. The havoc that writing wreaks is epitomized in the quote by Milosz, very popular among writers, "When a writer is born into a family, the family is finished". (Nunez, 2018, p. 42). The narrator paints a rather bleak picture of her profession. It seems that in such circumstances being a writer can only be the result of an unhealthy obsession or pathological addiction.

Apart from being an elegy for the friend, Nunez's novel goes beyond mourning for an individual and, in keeping with the new elegiac trend, bemoans the disappearance of a certain era for writers. The narrator reminisces about the bygone era when writing was "a religion requiring the devotion of a priest" as embodied by the poet Rainier Maria Rilke. (Nunez, 2018, p. 93) In the second decade of the twenty-first century such notions are grossly out of date. At some point, one of her students in the creative writing course accuses the narrator of portraying writing as more difficult than it really is, presumably, fearing competition of young writers who do not want to read ? they want to be read. The seemingly obvious rule related by David Lodge in his essay *The Novel Now* which says, "You cannot begin to write novels without having read at least one, and probably hundreds; without defining yourself in relationship of apprenticeship, discipleship, rivalry and antagonism with precursors and peers" no longer applies. (Lodge, 2013, p. 146) What used to be a prerequisite for becoming a writer, is no longer considered necessary. Even some university professors of literature teach texts without reading them. Basic literacy skills like the knowledge of grammar and punctuation can no longer be taken for granted among aspiring writers. It is suggested that the decline of the profession as well as the disappointment with the changing role of literature contributed to the friend's depression. "I think how you had started telling your students that if there was anything else they could do with their lives instead of becoming writers, any other profession, they should do it". (Nunez, 2018, p. 94) In the twenty-first century, young writers do not believe in the world of the past when the process of writing was a constant struggle, frustration, and picking yourself up after numerous failures. The narrator's friend once said, "Now everyone writes just like everyone poops and at the word *gift* many want to reach for a gun". (Nunez, 2018, p. 44) Writing has become so commonplace that almost anyone can aspire to be a writer, which exemplified by what the narrator hears from her therapist: "Everyone I know is writing a book". (Nunez, 2018, p. 102)

What is contrasted with Rilke's grand ideals is the depreciation of writing at universities and various writing courses (including video lessons of writing offered by a best-selling author). "You can write and enjoy gourmet food, write and taste wines, write and hike in the mountains, write and sail on a cruise ship, write and lose weight, write and kick your addiction, write and learn to knit, cook, bake, speak French or Italian, et cetera. Today a flyer for a literary festival: *Who says writing and relaxation don't mix?*". (Nunez, 2018, p. 99) For literature things hit rock bottom when the narrator receives and offer to buy a calendar with twelve authors posing nude.

The idea of such a calendar was earlier put forward by her friend as a grim joke but it did not take long to become reality. What transpires in the novel is a sense of shock and bewilderment at what the literary world has come to. It is accompanied by the sense of reality inevitably changing, which hangs heavily over the members of the older generation of writers.

With such a devaluation of the profession come the questions about the purpose, commercialization and politicization of the literary world as well as the moral aspect of writing. The narrator's friend became disenchanted with literature on one occasion saying, "[...] no novel, no matter how brilliantly written or full of ideas, was going to have any meaningful effect on society". (Nunez, 2018, p. 81) Some students of creative writing, the narrator teaches, think only successful writers from the past should be studied. For these aspiring writers the number of the sold copies is the only measure of success and their goal as writers is to achieve. But apart from pointing out such attitudes, the novel addresses more probing questions, like the politicization and of literature. The idea of art for art's sake is questioned by would-be writers. They either want instant success and financial gain or have a political agenda that they want to pursue in their writing. So, the problem of the form is becoming less and less relevant. Another issue is the elitist character of writing. It is suggested not only those who are talented and, by extension, privileged should be writers because it "leaves too many voices out." If the moral thing to do is give voice to the disenfranchised, is it wrong for a writer as an advantaged person to be the one who registers this voice? Perhaps, it is even immoral to write about your own class as well since it "furthers the agenda of white supremacy". (Nunez, 2028, p. 130) For the narrator novelizing what she heard from women who were victims of abuse feels immoral. It will not help the writer understand their situation better. The victims will not benefit from it either. Another issue is that perhaps journalism is a better form of bearing witness and the journalist's role should be giving voice to those who suffer. Conversely, writing fiction is an act of egotism on the part of the author and as such it is shameful. (Nunez, 2018, p. 131)

Finally, the novel addresses the hypocrisy of writers and the divergence between beliefs articulated in one's writing and life as well the discrepancy between fiction and reality. What makes the narrator wonder is Rilke, who wrote beautifully about love but could not love his wife, whom he left a year after they had married. Yet another example of his hypocrisy is the relationship he had with his daughter. "Rilke, who found such richness and meaning in the experience of childhood, and who wrote so many beautiful words about children, neglected his only child". (Nunez, 2018, p. 95) This dupli-

city is hard to swallow for contemporary students of creative writing and they tend to be unforgiving of writers' flaws and mistakes, refusing to study those whose conduct and outlook on life they find unacceptable. Rilke's definition of love as "two solitudes that protect and border and greet each other" keeps on recurring in *The Friend*. (Nunez, 2018, p. 94) Clearly, it is of profound importance to the narrator and describes her relationship with Apollo. However, a reaction to these words she gets from one of the students is, inadvertently echoing Hamlet, "What does it even mean? [...] It's just *words* It has nothing to do with *real life*, which is where love *actually happens*". (Nunez, 2018, p. 95) It looks like one of the key differences between old and new writers is that for the older generation writing is inseparable from life. It is something that is integrated into their lives and they cannot stop doing it. Old writers do not distance themselves from literature like the generation of new writers, who topple big names from their pedestals and have no problem separating real life from their profession. Nunez's novel is permeated with pessimism about the quality of literature that the new generation will produce. (Nunez, 2018, p. 98)

In spite of all the negativity and destruction that are associated with writing, the narrator's feelings about literature are ambiguous. In fact, for almost every argument against being a writer, we get one for it. Writing is a phenomenon that is fraught with contradictions, whose meaning, role and limits cannot be easily defined. To counter the argument that writing requires priestly devotion from the writer we get quotes by other distinguished authors which put the issue in a different light. The narrator cites Flannery O'Connor who said, "If writing wasn't painful, [...] it would not be worth doing" or Virginia Woolf's statement that "putting feelings into words *takes the pain away*". (Nunez, 2018, p. 98) Christopher Isherwood is quoted claiming that "the fictional character is like the beloved: extraordinary, never just another person," which challenges the view that writing about someone is a way of abusing or even destroying them. (Nunez, 2018, p. 133) Then, there are people who were saved by writing. The narrator reminisces about a writing workshop she taught and a participant who had been a prostitute and a drug addict, "Like many people I've met, she believes that writing saved her life". (Nunez, 2018, p. 44) A lot of women from the shelter for victims of human trafficking did not want to talk about their experience or even went mute. What served a therapeutic function was writing about their past. There was even one woman who was unable to speak and instead started journaling in a compulsive way. "Her hand ballooned, her fingers blistered and bled, but she wouldn't – couldn't stop". (Nunez, 2018, p. 49) Finally, Natalia

Ginsburg is quoted having called writing “the best vocation in the world”. (Nunez, 2018, p. 94) This, however, for both, the narrator and her friend was something they started losing faith in. So, in *The Friend* an aporia arises between writing as an act of destruction and an act of creation.

Another elegiac convention reworked in *The Friend*, also present in Theocritus’ *First Idyll*, is pathetic fallacy. When Daphnis dies, foxes wail and cattle moan for him. (Kennedy, 2007, p. 13) So, human perception of the world and emotions experienced by a mourner are reflected by the natural world. This situation is also mimicked in Nunez’s novel. The friend’s wife does not want to keep the dog her husband found in the park for fear he would remind her about the complicated feelings she had for her late spouse. Also, she cannot stand his howling, which started after the suicide. So, she turns to the narrator with the request to adopt the dog, which, according to her, is what her late husband would have wanted. To the narrator’s surprise the dog turns out to be a harlequin Great Dane, which complicates things because her apartment is very small. Nevertheless, after some consideration she agrees to adopt the animal. Apollo, the representative of the natural world in the novel, very much like the foxes and cattle in *First Idyll*, mourns the poet’s and at the same time his master’s death. He behaves as if he lost the will to live, not showing interest in the surrounding world, let alone, in his new owner. He is very much like a depressed person listlessly allowing the narrator to take him out and ignoring her during the day. Strangely enough, he intensely sniffs around her at night but does not want to make any other contact. The narrator feels so sorry for him that she does not protest when he banishes her from her bed so she has to sleep on an inflated mattress on the floor. At night, she is scared to move when he overwhelms her with his weight lying his paw on her when she is asleep. It makes her reflect on animal sadness, “They don’t commit suicide. They don’t weep. But they can and do fall to pieces. They can and do have their hearts broken. They can and do lose their minds”. (Nunez, 2018, p. 35) After she adopts the dog, he becomes the focal point of her life and the title of the novel acquires another meaning – Apollo becomes her friend. In a way he takes over her life and, gradually, the narrator’s main concern becomes lifting his depression and keeping him in as good health as possible.

The idea of a special relationship between a dog and a woman is not new in literature. Laura Brown in *Homeless Dogs and Melancholy Apes* studies the theme of a lady and her lapdog providing numerous examples from literary works that span a century and a half, beginning in the early eighteenth and ending in the nineteenth century. The inter-species connection

between women and animals is a motif in Elizabeth Barrett's poetry, Pope's *The Rape of the Lock*, Dickens' *Dombey and Son* and many others. In her interesting analysis of the concept of the lady and her lapdog Brown draws our attention to otherness as an inherent feature of such relationships, "The product of astonished difference, this new notion of love is based on alterity rather than of sameness and coherence". (Brown, 2010, p. 89) Indeed, even Apollo's grotesque size contrasted with the petite frame of his new mistress underscores the otherness. Similarly to the literary texts analysed by Brown, *The Friend* raises numerous questions about the role of animals in our lives and the limits to understanding what it is like to be an animal. Like Thomas Nagel in his seminal essay *What Is It Like To Be a Bat?* the narrator comes to the conclusion that it is not possible to know how it feels to be a member of another species. She observes, "He wags his tail, and for the thousandth time I think how frustrating it must be for a dog: the endless trouble of making yourself understood to a human". (Nunez, 2018, p. 92) It also works the other way round, "[...] we humans don't know the half of how dogs' brains work. They may well, in their mute unfathomable way, know us better than we know them". (Nunez, 2018, p. 97) Apart from vexation, what transpires here is a sense of wonder on the part of the narrator who realizes there are parts of animal life that are shrouded in mystery.

Regardless of how well humans and dogs understand each other, Apollo becomes a substitute for a human being. The substitution creates a disconcerting feeling of something outside the norm happening, which, again, is not unheard of in literature. Laura Brown writes about Florence Dombey from Dickens' *Dombey and Son* for whom a dog become "a direct substitute for her cruel alienation from her father". (Brown, 2010, p. 82) In her analysis of these eighteenth and nineteenth century texts, Brown also comes up with numerous examples of interspecies intimacies being replacement for human ones, "Indeed, the lapdog seems to be both an inappropriate or perverse sexual partner for the woman, and also a metonym for female sexuality". (Brown, 2010, p. 72) Interestingly, these ideas also echo in *The Friend*. Apollo emerges as a sort of replacement of the dead friend and ex-lover. The narrator's therapist claims that she was in love with her friend and that is why her grieving is complicated. The acquisition of a dog is the form of therapy but at the same time there is something disconcerting in the relationship with the animal that other people notice and the narrator herself too. For instance, sitting in her therapist's office with the dog on her side the narrator feels as if she was in couple's therapy. On another occasion, a passer-by calls Apollo sexy, which unsettles the narrator. Then, at a party, a woman giggles and

asks the narrator whether she is the one who is in love with a dog. (Nunez, 2018, p. 120) The dog has eyes that look like those of the dead friend and according to the narrator what needs to happen for Apollo is to forget about his previous owner and fall in love with her. (Nunez, 2018, p. 63) All these situations in which Apollo is anthropomorphised and elevated to the status of a life partner raise questions about the nature of interspecies relationships. They also throw off balance the notion of hierarchy in such relationships as well as the very concept of love. What transpires in *The Friend* is that pets need people, just like people need pets because in spite of their otherness, animals are capable of filling an emotional void in people's lives. However, there is always a gap between the two species, the inability to fully comprehend each other. Paradoxically, according to the narrator if people and dogs knew each other's languages and could communicate without any problems, it "would ruin everything". (Nunez, 2018, p. 120) For people, these blank spaces in the knowledge of the other are an opportunity to vest them with meaning, usually by anthropomorphising the animal, which as the narrator observes herself is simply inescapable.

The last part of elegy is "consolation for the inescapability of death". (Vickery, 2009, p. 1) In the final chapter of the book the narrator retreats to the countryside, actually forced to do it because of Apollo's deteriorating health – he walks with difficulty and is incontinent. Big dogs do not have a long life expectancy and are troubled by numerous diseases. Luckily, an opportunity materializes itself in the form of a friend who has a cottage at the seaside. This is where the pastoral, traditionally an elegiac convention comes into play. The narrator moves to the seaside with a very sick dog to reflect and start healing. "The pastoral becomes a kind of retreat, a kind of turning aside from everyday concerns and routines, a clearing of imaginative and poetic space in which to contemplate fundamentals. At the same time the pastoral is a place of work and an interlude from work [...]". (Kennedy, 2007, p. 17) The cottage at the seaside according to elegiac standards is supposed to be a consolatory space and a place where the writer can overcome the block.

It is interesting to look at the process of mourning from the psychoanalytic and anthropological perspectives. The Freudian model of the work of mourning is outlined in his *Mourning and Melancholia*. According to Freud, to complete the healthy process of mourning, as opposed to pathological melancholy, what needs to happen is the detachment of the mourner from the object of mourning, whereas melancholia means that the mourner's ego is identified with the lost object and, as a result, the mourner cannot let the object go. The tendency for modern elegists is to write elegies that are

anti-consolatory and, as a result, melancholic in nature. (Kennedy, 2007, p. 57) Indeed, in *The Friend* it looks like the narrator is suffering from melancholia because the period of mourning is extended and the therapy does not seem to help. The former owner of their retreat used to be a woman who is suffering from dementia. As a result her past is taken away from her, including the memory of the things she lost, like flowers she planted earlier as an avid gardener. This situation makes the narrator reflect, “What we miss – what we lose and what we mourn – isn’t this that makes us who, deep down, we truly are. To say nothing of what we wanted in life but never got to have”. (Nunez, 2018, p. 143) This statement makes peace with life as a state of permanent loss, but is at the same time out of keeping with the idea of healthy mourning that involves detaching oneself from the object of mourning. Here, loss becomes a formative, even enriching experience and there is some value in not letting go completely. The narrator states she would not like to stop missing her dead friend. The people we mourn constitute our identity and the situation of loss is constantly replayed in our lives. In the novel, it is exemplified by the loss of a human friend, followed by the loss of animal friend. The dog dies with butterflies swarming over his head in the final idyllic scene of the novel. From the anthropological perspective, as related by Akira Mizuta Lippit in *Electric Animal* people once considered animals the inherent part of their existence. Gradually, they separated from the animal world. As a result, the humanity has remained in the state of mourning. “The mourning is for the self – a self that had become dehumanized in the very process of humanity’s becoming human”. (Lippit, 2000, p. 18) Hence, Apollo’s death points to an ever present sense of loss that people have felt since they started looking at the animal as the other. This, again, fits into the more recent elegiac trend – a sense of bereavement that goes beyond the personal.

One way of dealing with grief is artistic creation, which can help to channel the energy of the mourner. James Brown in *Tears and the Art of Grief* observes that “[the] genre of elegy seeks not to represent but to participate in mourning, and is thus implicitly committed to its success”. (Brown, 2015, p. 190) So, the very act of writing should assist and accelerate the process of mourning. The narrator analyses the idea of writing about the deceased too. “Sure I worried that writing about it might be a mistake. You write a thing down because you’re hoping to get a hold on it. You write about experiences partly to understand what they mean, partly not to lose them to time. To oblivion. But there’s always a danger of the opposite happening. Losing the memory of the experience itself to the memory of writing about it”. (Nunez, 2018,

p. 142) The novel metafictionally reflects on the power that stories have. What transpires here is a certain ambivalence about the role of the writing process for the elegist. There is a danger of the activity erasing the elegised from memory and replacing him with the memory of artistic creation. Paradoxically, the elegy emerges as a means to remember and forget at the same time. Writing also gives the narrator a chance to reverse the irreversible, albeit for a moment. One chapter of the novel retells the story of the friend's suicide but in this version he is found at the last minute and rescued. In the alternative ending of the story the narrator meets him, they talk about the suicide attempt and her friend is glad he survived. She tells him she is writing the story of his suicide attempt with some details changed and they have a conversation about it. This metafictional, self-referential aspect of the novel draws the reader's attention to the business of writing and gestures towards other post modern texts like *French Lieutenant's Woman* or *Flaubert's Parrot*. It blurs the line between life and representation and also raises questions about the relationship between the narrator writer and her characters, as well as the addressees of this story. Finally, it poses questions about the narrative power. Can writing bring people back from the dead? The novel starts with the narrator addressing her dead friend and ends with her addressing the dog, who dies in the final scene. Is the mourning process over or will the dog's death instigate another one? These questions remain unanswered in *The Friend* rendering interpretative closure impossible.

The narrator's statement about loss as a shaping force in a person's life is in line with the changes that the elegy has been undergoing for a few decades. They have broadened the scope of the genre and challenged its traditional poetic form. "The twentieth century gradually transformed the elegy into a focus on the diversity of losses occurring in human life and a shaping of new (or different) elegiac responses to them". (Vickery, 2009, p. 1) Indeed, *The Friend* is as much about losing a loved one to suicide and as it is about the disappearance of aesthetic ideals and work ethic that writers once espoused. It is also about the passage of time and how it affects us physically and mentally. It takes as its subject losses incurred in writers' personal lives by their lifetime vocation such as the destruction of their families and loneliness. What is more, the novel shows that loss can be experienced by another species, but the nature of the emotion is for us unfathomable, whereas the humanity remains in the state of mourning for its lost connection with the animal world. Finally, it withholds answers to the questions about the nature of artistic creation, like so many postmodern texts calling us to concede the lack of resolution.

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**Vladimir Nabokov o antywartościach
– popkultura, reklama, konformizm**

**Vladimir Nabokov about antiquities
– pop culture, advertising, conformism**

Abstrakt

Vladimir Nabokov należy do najbardziej popularnych prozaików XX wieku, jego twórczość reprezentuje wyszukana kompozycja, gra tekstualna z czytelnikiem, bogata stylistyka, a także dwujęzyczność – utwory pisane po rosyjsku i angielsku. Artykuł odpowiada na pytanie, czy mimo skomplikowanej treści i formy twórczość Nabokova osiągnęła popularność dzięki typowym dla popkultury chwytom, wątkom i zabiegom, czy może zdecydował o tym talent pisarza? Nabokov niewątpliwie miał krytyczny stosunek do popkultury, która niszczy indywidualizm i oryginalność, jednocześnie prowadził z nią literacki dialog, wykorzystując popularne tematy i motywy do własnej, niepowtarzalnej nabokowskiej perspektywy. Pisarz dostrzegał ewidentne zagrożenia płynące z popkultury, krytykował rynek reklamowy, atakował stereotypizację współczesnych poglądów i wszechobecny konformizm, jednocześnie doceniał problemy powszechnie odrzucane (seksualność) czy atrakcyjne, ale banalizowane (wątki detektywistyczne, przygodowe, awanturnicze). Nabokov umiejętnie korzystał z kultury masowej, poprzez swoje dzieła kształtował wrażliwość odbiorcy, intuicyjnie ufał jego inteligencji.

Słowa kluczowe: *Nabokov, popkultura, konformizm, reklama.*

Abstract

Vladimir Nabokov belongs to the most popular prose writers of the 20th century. His work is represented by a sophisticated composition, playing with the reader, rich stylistics, as well as bilingualism – works written in Russian and English. The article answers the question whether, despite the complicated content and form, Nabokov's work has achieved popularity thanks to the typical pop culture tricks, threads and tricks, or whether this was decided by the writer's talent. Nabokov undoubtedly had a critical attitude towards pop culture, which destroys individualism and originality, while at the same time was conducting a literary dialogue with it, using popular themes and motifs for its own unique perspective. The writer noticed the obvious threats arising from pop culture, criticized the advertising market, attacked the stereotyping of contemporary views and ubiquitous conformism, and at the same time he appreciated problems that were commonly rejected (sexuality) or attractive but trivialized (detective and adventure threads). Nabokov skillfully used mass culture, through his works he shaped the sensitivity of the recipient and intuitively trusted his intelligence.

Key words: *Nabokov, pop culture, conformism, advertising.*

Vladimir Nabokov (1899-1977) rosyjsko-amerykański pisarz, piszący w dwóch językach: rosyjskim i angielskim, należy do najbardziej znanych współczesnych twórców, prozaików XX wieku. W kontekście literatury rosyjskiej Nabokova należy sklasyfikować jako twórcę emigracyjnego, którego cały dorobek powstał poza granicami ojczyzny Rosji, opuszczonej przez rodzinę pisarza po wybuchu rewolucji październikowej 1917 roku. Bilingwizm Nabokova wypływał nie tylko z faktu świadomego posługiwania się w twórczości dwoma językami, z przyjęcia amerykańskiego obywatelstwa, a więc i reprezentowania swą twórczością literatury amerykańskiej, ale był naturalnym, wrodzonym niemalże sposobem komunikacji dla pisarza. Nabokov bowiem urodził się i dorastał w bogatej arystokratycznej rodzinie, w której częściej posługiwano się językiem angielskim (a także językiem francuskim) niż narodowym, rosyjskim, Nabokowowie należeli do anglofilskiej elity i w takim dwukulturowym duchu wychowywali swe dzieci. (Nabokov, 1991, s. 60) W tej wpływowej rodzinie zawsze dbano o dobre wychowanie, pielęgnowano dobry gust wynikający z arystokratycznego elitaryzmu, na który bogata i uprzywilejowana rodzina Nabokowów mogła sobie pozwolić, który zresztą był obowiązujący w ówczesnych wyższych sferach, nie dziwi więc także fakt, że ekskluzywizm i autentyczność miały być aspiracją w literackim dorobku pisarza. Niestety poetycki

debiut, pierwsze wiersze młodego Nabokova (pisał pod pseudonimem Władimir Sirin) spotykały się z letnią oceną, a nawet krytyką, choćby ze strony słynnej rosyjskiej poetki, uchodzącej za autorytet w literackim środowisku – Zinaidy Gippius, która zarzucała młodemu poecie wtórność wobec uznanych symbolistów. (Boyd, 2006, s. 78) Kwestia oryginalności, niepowtarzalności, będąca celem niemal wszystkich literatów, stała się zatem fundamentalną w wyborach przyszłego prozaika Nabokova. Konsekwentna literacka postawa narodziła się ze skomplikowanych losów pisarza, który po studiach w Cambridge i niemożności powrotu do ojczyzny, tak jak wielu innych Rosjan, skazany był na emigrację początkowo w Niemczech, później we Francji, w skrajnie trudnych wówczas warunkach finansowych. Nabokov zarabiał na własne utrzymanie nie tylko pracą twórczą, ta dawała mu mierny dochód, lecz dorabiał jako korepetytor języka angielskiego, francuskiego, dawał lekcje gry w szachy czy w tenisa. (Nabokov, 1991, s. 208) Potrzeby finansowe były więc niezwykle ważnym czynnikiem mobilizującym Nabokova do zdobycia czytelnika masowego, a za nim szła rozpoznawalność i sława, stąd przejście z języka rosyjskiego, który zawężał krąg odbiorców do emigrantów rosyjskich, na język angielski, który z kolei dawał pisarzowi znacznie szerszy odbiór czytelniczy. W języku rosyjskim Władimir Nabokov napisał następujące utwory: *Maszeńka* prozatorski debiut z 1925 roku, *Król, dama, walet* (1928), *Obrona Łużyna* (1929), *Oko* (1930), *Splendor* (1930), *Camera Obscura (Śmiech w ciemności)* (1931), *Rozpacz* (1934), *Zaproszenie na egzekucję* (1934), *Dar* (1937), w języku angielskim natomiast wszystkie pozostałe dzieła: *Prawdziwe życie Sebastiana Knighta* (1939), oraz po przybyciu do Stanów Zjednoczonych w 1940 roku, *Nieprawe godło* (1946), *Lolita* (1953), *Pnin* (1955), *Blady ogień* (1961), *Ada czyli Żar* (1968), *Przezroczyście przedmioty* (1972), *Patrz na te arlekiny!* (1974).

Dylemat, jak być poczytnym i uznanym pisarzem, lubianym przez czytelników i jednocześnie cenionym przez krytyków, nurtował Nabokova aż do czasu sukcesu jego najslynniejszej powieści *Lolita*, ukończonej w 1953 roku, określał także literackie priorytety pisarza. Osiągnięcie sukcesu artystycznego nie zawsze łączyło się z sukcesem komercyjnym, finansowym, a Nabokov chciał osiągnąć jedno i drugie, co w połączeniu z niewątpliwym talentem, pisarską konsekwencją i bezkompromisowością poglądów, rzeczywiście pisarzowi udało się nadzwyczajnie. Można by powiedzieć, że było to rezultatem ciężkiej pracy, sprzyjających okoliczności w do dzisiaj głodnej sukcesów Ameryce, ale warto również podkreślić niezwykłą pisarską intuicję, która pomimo, a może dzięki swojej kontrowersyjności zaowocowała faktem, że Nabokov jako twórca przynależny literaturze wyższej nie ignorował literatury niższej, masowej. (*Słownik literatury masowej*, 2006)

Na tę kwestię zwrócili uwagę znani rosyjscy badacze: Naum Lejderman i Mark Lipowiecki, którzy wykazali zbieżności tematyczne i inspiracje Nabokova kulturą popularną, stanowiącą „kod” i jeden z podstawowych wymiarów powieści *Lolita*. (Lederman, Lipowiecki, 2001, s. 51-60) Amerykańska rzeczywistość w latach 50. XX w. zobrazowana z typowym dla pisarza sarkastycznym przekazem niemal kipiała od popkulturowych znaków, stereotypów i pospolitych gustów wyznaczających reklamowy, sztuczny model życia bohaterów powieści. Lolita wraz ze swoją matką reprezentują styl życia, który Nabokov określał jako filisterstwo, konformizm, trywialność, czyli sposób bycia w korelacji z tym co modne, konwencjonalne i stereotypowe. Humbert natomiast, reprezentant dobrego wysublimowanego gustu, Europejczyk z pochodzenia, na dodatek artysta – esteta jest przedstawiony w opozycji do taniego, populistycznego i tandetnego stylu Charlotty Haze i jej córki. Autor, słowami swego bohatera, tak pogardliwie charakteryzuje Charlotte:

„Lepiej chyba od razu ją opisać niż odkładać to na później. Biedaczka była grubo po trzydziestce, miała błyszczące czoło, wyskubane brwi i dosyć prostą, ale niebrzydką twarz w typie, który można określić jako słaby roztwór Marleny Dietrich. (...) Było jasne, że jest jedną z kobiet, których polerowane słowa dać mogą obraz klubu książki, klubu brydżowego lub jakiegokolwiek morderczo konwencjonalnej rzeczy, lecz nigdy ich własnych dusz; kobiet całkowicie pozbawionych poczucia humoru; kobiet, które w głębi serca ani trochę nie interesują się żadnym z kilkunastu możliwych tematów salonowej konwersacji, ale skrupulatnie przestrzegają zasad jej prowadzenia, reguł rozmowy, przez której słoneczny celofan wyraźnie prześwitują niezbyt apetyczne frustracje.” (Nabokov, 1997, s. 43-44)

Pisarz właściwie nie szczędzi krytyki wszelkim aspektom amerykańskiego życia społecznego, podkreślając ciężący na nim kult popularności i trywialności, wyśmiewa zacofany system wychowawczy i prawny, a przede wszystkim zjadliwie obnaża hipokryzję pruderyjnej obyczajowości. Humbert jako bohater negatywny, poddany pejoratywnej ocenie czytelnika, ma trudne zadanie dostosowania się do tradycyjnych trendów i pospolitych gustów, by zdobyć miłość swego życia, czyli uwieść dwunastoletnią Lolitę. Obydwa procesy – adaptacyjny i miłosny są amoralne, ponieważ Humbert łamie nie tylko ogólne normy etyczne, lecz niszczy zarazem samego siebie. Jego bunt, poszukiwanie szczęścia i wolności poprzez odrzucenie zasad moralnych prowadzi do upadku bohatera, jego autodestrukcji i tragedii Charlotty, a na-

stępnie ukochanej Lolity. Złudne przekonanie, w myśl modnej psychologii freudowskiej, której sam Nabokov nienawidził, o nieograniczonej wolności i równoważeniu kompleksów płciowych, którymi objaśniano typy behawioralne, nieuchronnie prowadzi bohatera do porażki. (Nabokov, 1991, s. 223) Tragiczny los Humberta zostaje przypieczętowany, kiedy mimo buntu i niezgody na powszechny oportunizm, bohater świadomie dokonuje manipulacji duchowej opartej na kulcie nieograniczonej konsumpcji, sukcesu i powodzenia. (Lejderman, Lipowiecki, 2001, s. 55-57) Humbert poddaje się nawet mitotwórstwu, jakie kreuje popkultura, sam wierzy w romantyczną, odkupiającą moc miłości, w realną możliwość eliminacji swego przeciwnika Gilty'iego, w zaspokajającą siłę zemsty. Emocjonalność jednakże, jak pokazuje Nabokov, podlega stereotypizacji chwilowej, nie można bowiem omamić duszy człowieka wrażliwego, poszukującego prawdziwych przeżyć i doznań, które jako autentyczne narażone są na rozczarowania i zawody. Miłość jest zatem wartością stałą, nie ulegającą manipulacji czy schematyzmowi, zawsze ma wymiar indywidualny i niepowtarzalny, jest przede wszystkim wartością etyczną, a niemoralność Humberta niszczy wrażliwość na drugiego człowieka, rozwija egoizm i zaspokajanie jedynie swoich potrzeb i oczekiwań. (Engelking, 2011, s. 299) Miłość jako podstawowa wartość życia człowieka nie może być sztucznie kreowana i reklamowana, fałszywie stereotypizowana i komercjalizowana, ponieważ niszczy się w ten sposób jej jednostkowy autentyczny charakter. Nabokov w popkulturze widział niewątpliwe i jasno sprecyzowane zagrożenia dla indywidualizmu i oryginalności, stanowiła ona pole kontrastu dla kultury wysokiej, a więc zorientowanej na niebanalność i nowatorstwo.

Warto podkreślić, iż krytyczny stosunek pisarza do kultury popularnej jako tej, która ujednocila gusta i niszczy oryginalność nie oznacza jednocześnie całkowitego odrzucenia zjawisk nowoczesności i współczesności, Nabokov bowiem chętnie korzystał z jej osiągnięć, swych bohaterów także kreował na ludzi krytycznych i jednocześnie otwartych na nowe zjawiska i zachowania. Przejawem takiego nowoczesnego traktowania i postrzegania rzeczywistości jest seksualność, która mimo modernistycznej fascynacji, na przełomie XX wieku przynależna była jednak sztuce niższej i zakazanej. W prozie Nabokova kwestie erotyczne początkowo miały konwencjonalne ujęcie, chociaż autor nie stronił od tej tematyki, to przedstawiał ją w sposób zawoalowany, lecz bezpruderyjny. W późniejszej twórczości pisarza możemy zauważyć pewną ewolucję w dziedzinie prezentowanej obyczajowości, odwagę w przedstawianiu zagadnień seksualnych, które były rewolucyjne, łamały tematy powszechnie odbierane jako tabu. *Lolita* Nabokova dotyka przecież niezwykle bulwersującego problemu pedofilii, która, co prawda estetyzowana przez

autora, jednak jednoznacznie potępiona i ukarana w powieści, spotkała się z oburzeniem krytyki i zakazem publikacji w Stanach Zjednoczonych. Nabokova oskarżano (niesłusznie) o propagowanie pornografii i wynaturzeń seksualnych, a jego powieść wywołująca ogromny ferment obyczajowy stała się utworem zakazanym, brukowym, po latach dopiero dziełem zrehabilitowanym i uznanym dziś za jedno z największych osiągnięć literatury XX wieku. (Salska, 2003, s. 93) Nabokov nie stronił także od innych trudnych tematów z dziedziny seksuologii, a obyczajowo niepoprawnych: homoseksualizmu czy kazirodztwa – w *Bladym ogniu* jeden z głównych bohaterów Charles Kinbote, podobnie jak następne z jego wcieleń – Karol Umiłowany, wykazują homoseksualne skłonności, natomiast Vana i Adę z powieści *Ada czyli Żar* łączy kazirodczy związek. Nabokov zatem świadomie wprowadził problematykę seksualną do swych utworów, ukazał ją w artystycznej perspektywie, często w filozoficznym kontekście, tym samym dokonując awansu erotyki z nieoficjalnego obiegu do ambitnej literatury pięknej. (*Erotyzm, groza, okrucieństwo...*, 2008)

Kolejne wątki charakterystyczne dla lekkiej rozrywkowej popkultury, umiejętnie wykorzystane przez Nabokova, to romansowy i często mu towarzyszący awanturniczy, przygodowy. Motywy zdrady, trójkątów miłosnych, nieszczęśliwej i tragicznej miłości, samobójczej śmierci i efektownej zemsty spotkamy na przestrzeni całej twórczości pisarza, stanowią one podstawę niejednej intrygi jak i atrakcyjnego tła, przeplatają się w oryginalnej strukturze nabokovowskiej prozy. Począwszy od powieści *Maszeńka*, na utworze *Patrz na te arlekiny!* skończywszy, autor obrazuje zarazem trywialne, schematyczne życie bohaterów i jednocześnie stawia ich w nieoczywistych sytuacjach, w oryginalnych losowych okolicznościach, które determinują emocjonalne decyzje i dramatyczne wybory. Nagłe zwroty akcji, miłosne perypetie, determinizm losowy, wyznaczniki znamienne dla literatury sentymentalnej nieobce są także prozie Nabokova, pisarz chętnie wykorzystuje rekwizyty spotykane w melodramatach i romansowych komediach, dopuszcza zbrodnie w afekcie (*Camera obscura*), jak i zaplanowane w najdrobniejszych szczegółach (*Rozpacz*).

Kolejnymi wyróżnikami popkulturowymi, które spotykamy u Nabokova, są wątki kryminalne i sensacyjne, perturbacje skonfliktowanych bohaterów, tematyka zbrodni, tajemnica śmierci i dochodzenia do prawdy w oparciu o emocjonalne zaangażowanie bohaterów jak i czytelników, charakterystyczne dla literatury detektywistycznej. (Lasić, 1976; Mrowczyk-Hearfield, 1998, s. 87-98) Pisarz wielokrotnie czyni aluzje do znanych powieści tego gatunku, a koncepcja wielowątkowości utworu, wprowadzania zagadek tekstowych, kalamburów słownych i gry literackiej czyni z odbiorcy prozy Nabokova niejako detektywa tropiącego zawilości tekstualne i fabularne.

Świadomym zabiegiem popkulturowym, który promował twórczość Nabokova, były filmowe adaptacje jego dzieł, w szczególności *Lolity* w reżyserii Stanleya Kubricka z 1962 roku, a wyjątkową popularność zyskało także imię głównej bohaterki, które weszło do języka kultury – „lolitką” określa się dziś doświadczonego erotycznie podlotka. (Kopaliński, 2003, s. 677). Pisarz niezwykle cenił sztukę kinową, dorabiał nawet jako statysta filmowy, chętnie także wyrażał zgodę na filmowe ekranizacje swych powieści, nie dziwi zatem, że chwytły kinowe są nierzadkie w jego prozie. (Boyd, 2006, s. 350-351) Kadrowanie akcji i postaci, szczegółowe, scenograficzne prezentowanie rzeczywistości, ujęte jakby okiem kamery i plenerowe perspektywy występują w uznanym za najbardziej kinowe dzieło *Camera obscura* (sam tytuł to sugeruje), ale można je wyróżnić także w pozostałych utworach autora *Lolity*.

Proza Nabokova wykazuje zatem liczne związki z kulturą i literaturą masową, pisarz dostrzegał w niej ogromne możliwości, ale i ograniczenia, zagrożenia dla współczesnego człowieka. W odpowiedzi na wyzwania kulturowe i powszechną fascynację popkulturą pisarz napisał esej *Filistrzy i filisterstwo*, w którym dał szczegółową wykładnię wpływu kultury masowej na odbiorcę. Tekst ten został napisany w 1957 roku, dołączony do jednego z wykładów, które pisarz wygłosił swoim amerykańskim studentom na kursie literatury rosyjskiej. Profesor Nabokov szczegółowo charakteryzuje w nim typ człowieka, który zawsze go mierzył, typ filistra – prostaka, dyletanta, ignoranta, tępaka, człowieka dorosłego, jak twierdził pisarz, występującego na zaawansowanym etapie rozwoju cywilizacji i współcześnie uformowanego przez kulturę masową. Największą odpowiedzialnością za ukształtowanie współczesnego pisarzowi filistra obarczył Nabokov rynek reklamowy, który zdaniem pisarza odwołuje się do najprostszych, najbardziej prymitywnych odczuć u odbiorcy reklamy, przy jednoczesnym rozbudzeniu w nim nieznanym i nierozumianym aspiracji. Dyletant nieznający się na kulturze i sztuce pod wpływem reklamy pragnie być kimś lepszym, szczęśliwszym, staje się ofiarą sztucznego, wykreowanego świata, którego sensowność opiera się na gromadzeniu różnych dóbr materialnych. Reklama, w przekonaniu Nabokova, nie rozwija, tylko ogłupia odbiorców, nie niesie żadnych duchowych wartości, jedynie kształtuje materialne potrzeby i oczekiwania:

„Głębokie filisterstwo bijące z reklamówek polega nie na przesadzie w zachwalaniu tego czy innego przydatnego artykułu, ale tkwi w sugestii, że szczęście jest towarem i że jego nabycie w jakiś sposób nobilituje nabywcę. Ten wykreowany przez speców od reklamy świat jest (...) wyprany z jakiegokolwiek duchowości

(...) jest czymś w rodzaju towarzyszącej prawdziwej egzystencji światem – widmem...”. (Nabokov, 2002, s. 392)

Nabokov twierdzi, że ukształtowany przez reklamę, wizytówkę kultury masowej ignorant nie odczuwa potrzeby własnego rozwoju, jest typem konformisty, który niczym kameleon zawsze dopasuje się do okoliczności i środowiska, w którym przebywa. Konformizm jest imitacją autentyczności, antywartością opartą na wygodnictwie i strachu wielokrotnie krytykowaną przez Nabokova, szczególnie w kontekście literatury radzieckiej. Sam pisarz swą biografią i działalnością literacką dał świadectwo indywidualizmu, oryginalności i bezkompromisowości. Jego budzące w wielu niechęć elitaryzm i wyniosłość, zjadliwa krytyka i *strong opinions*, powodowały, że niejednokrotnie zrywał z towarzyskimi regułami i akademickimi standardami i jako niepoprawny arystokrata był uważany za oryginała i dziwaka. (Nabokov, 1973) Nie dziwi zatem walka, jaką Nabokov wypowiedział tandecie, prostactwu i konformizmowi:

„Rosjanie mają, a przynajmniej mieli, specjalne słowo na określenie takiego zadowolonego z siebie, zadufanego filisterstwa – *poszłost'*. *Poszłizm* przy całej swojej tandetności sprawia fałszywe wrażenie czegoś ważnego, pięknego mądrego i pociągającego. Jeśli przyklepimy komuś lub czemuś zabójczą etykietkę *poszłizmu*, to jest nie tylko ocena estetyczna, ale także oskarżenie moralne. To, co autentyczne, szczere, dobre nie jest nigdy *poszłoje*. Można by z dużą dozą prawdopodobieństwa założyć, że prosty, nieskażony cywilizacją człowiek jest rzadko, jeśli w ogóle, napiętnowany *poszłostią*, gdyż jej niezbędnym elementem jest cywilizacyjny poler.” (Nabokov, 2002, s. 392)

Należy zaznaczyć, że Nabokov nie tylko krytykował kulturę masową, reklamę i konformizm, pisarz wskazał lekarstwo, antidotum, które powinno nas ochronić przed zgubnym działaniem antywartości, a mianowicie podkreślił znaczenie intelektu. Człowiek inteligentny, zdaniem Nabokova, nie da się omamić popkulturze, obroną przed trywializmem powinna być bowiem rozwinięta duchowość i płynąca z niej kulturowa świadomość.

Nabokov rozumiał, że jako pisarz nie może ignorować zjawisk popkulturowych, wiedział, że musi wśród nich funkcjonować i korzystać bardzo rozważnie, jego stosunek do kultury masowej był więc perspektywiczny – wykorzystywał te elementy kulturowe, które w jego mniemaniu były kreatywne, ale czynił to z tak dużą rozważnością, że jego dzieła nie są banalne i należą do literatury elitarnej. Na teksty Nabokova składają się dwa poziomy

odbioru – niższy, budujący treść podstawową, wykazującą zbliżenie z literaturą popularną, adresowany do szerokiego zakresu odbiorców oraz wyższy, zawierający sensy ukryte, głębię metafizyczną i przeznaczony dla wyrafinowanego, inteligentnego czytelnika. Dzięki temu Nabokov odniósł sukces, ponieważ zapowiadając postmodernizm, potrafił wydobyć z kultury masowej wartości uniwersalne i zaadoptować je do swych dzieł jako indywidualne i niepowtarzalne. Pisarz dialogował z popkulturą i jego ówczesna percepcja literacka stała się wyznacznikiem dzisiejszych trendów kulturowych, które łączą różne znaki, gusta i oczekiwania, kształtują nową wrażliwość współczesnego odbiorcy, jednocześnie otwartego na nowe zjawiska kulturowe i krytycznego wobec nich, ponieważ inteligentny odbiorca potrafi je weryfikować i oceniać.

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The Scottish diaspora in the Polish-Lithuanian Commonwealth

Szkocka Diaspora na terenie Rzeczypospolitej Obojga Narodów

Abstract

At the turn of the sixteenth and seventeenth centuries, the Polish-Lithuanian Commonwealth experienced an unprecedented influx of Scottish immigrants. It is estimated that at its peak (the 1640s) there were approximately 30,000 Scottish settlers in Poland (Bajer, 2012, p. 77). At a time when Europe was engulfed in various wars and religious conflicts, the multi-ethnic and tolerant Polish-Lithuanian Commonwealth became 'the America of those days' for Scottish migrants (Popławska, 1993, p. 35), enabling them to obtain full civic rights and gain the highest distinctions. Hence, this article is concerned primarily with the main factors that enticed this migration as well as the Scot's contribution to religious, political and military life of Poland.

Key words: *Scots, immigration, the Commonwealth, Scottish settlers.*

Abstrakt

Na przełomie szesnastego i siedemnastego wieku Rzeczpospolita Obojga Narodów doświadczyła bezprecedensowego napływu szkockich imigrantów. Szacuje się, że w okresie największego wzrostu imigracji, w Polsce było około 30,000 szkoc-

kich osadników (Bajer, 2012, p. 77). W czasach, kiedy Europa pochłonięta była różnymi wojnami i konfliktami o podłożu religijnym, zróżnicowana etnicznie oraz tolerancyjna Rzeczpospolita Obojga Narodów stała się 'Ameryką tamtych czasów' dla szkockich migrantów (Popławska, 1993, p. 35), umożliwiającą zdobycie pełnych praw obywatelskich jak również najważniejszych funkcji w państwie. Niniejszy artykuł, zatem poświęcony jest analizie głównych czynników, które wpłynęły na migracje jak również udział Szkotów w życiu politycznym, religijnym i wojskowym ówczesnej Polski.

Słowa kluczowe: *Szkoci, imigracja, Rzeczpospolita Obojga Narodów, szkoccy osadnicy.*

The Polish-Lithuanian Commonwealth was founded in 1386, with the marriage of Queen Jadwiga of Poland and Władysław Jagiełło, the Grand Duke of Lithuania. (Bajer, 2012, p. 83) It continued to exist for several centuries and by the second half of the seventeenth century it became one of the largest and most powerful kingdoms in Europe, attaining its greatest extent 990,000 square kilometres. (Wyczański, 1973, p. 17-18) At its peak (late 16th century), with its 'total population estimated at eleven million, the Polish-Lithuanian Commonwealth was the third most populous state in Europe'. (Kukło, 1996, p. 73-74) The commonwealth government, which was a 'republic under the presidency of the King' (Benfield, 2009, p. 254) constituted equilibrium that lasted for a couple of centuries and fostered economic stability. According to Krzysztof Olszewski, 'Poland was the main supplier of grain to Western Europe and a considerable trading partner. As long as the grain produced high profits, the economy grew and the Commonwealth was powerful'. (Olszewski, 2007, p. 9) It seems that the Acts of the Lublin Diet (1569) that transformed the Commonwealth into 'a composite republic of the nobles, where the throne was elective and the royal prerogative was restricted to a large extent by the privileges of the nobles' (Dembkowski, 1982, p. 175) contributed tremendously to the emergence of the ideal form of government in contemporary Europe that endured for over 200 years. Moreover, the 'Golden Freedom' of the political system included religious liberty guaranteed by Warsaw Confederation Act 1573 (Davies, 1982, p. 282, xxxi) which was unprecedented amid the ethnic and religious tensions of that time. As historian Norman Davies aptly noticed: 'Certainly, the wording and the substance of the Confederation of Warsaw of 28 January 1573 were extraordinary with regards to prevailing conditions elsewhere in Europe, and they governed the principles of religious life

in the Republic for over two hundred years' (Davies, 1982, p. 126) Thus, with a unique political and economic structure that was futuristic for those times (Olszewski, 2007, p. 9) the Polish-Lithuanian Commonwealth experienced an unprecedented influx of immigrants.

It is estimated that the early 17th century Commonwealth 'sustained a multi-ethnic population of 11 million'. (Pogonowski, 1987, p. 141) In his article, *The Polish-Lithuanian Commonwealth as a Political Space*, Satoshi Koyama aptly notices: 'The Polish-Lithuanian Commonwealth was a country inhabited by various groups, speaking different languages and having diverse creeds' (Koyama, 2007, p. 139). Peter Bajer points out that neighbouring countries at that time formed rather homogenous societies, while Poland-Lithuania was a culturally diverse society', made up by such ethnic groups as: 'Ruthenians, Lithuanians, Jews, Germans, Balts, Armenians, Tatars as well as Italians, Frenchmen, Dutchmen, Magyars, Transylvanians, Czechs, Croatians, Flemings, Wallons and Swedes'. (Bajer, 2012, p. 65) According to Cezary Kuklo, at the turn of the 16th century those ethnic minorities constituted even 50 percent of the population. (Kuklo, 1996, p. 73-74) The ethnic diversity appears to be fully reflected in three official languages of the Commonwealth: Latin, Polish and Ruthenian. (Koyama, 2007, p. 139) What is more, Latin was not only a 'common language of the intellectuals' (Koyama, 2007, p. 139) but 'in the sixteenth century, Latin language education was popular among the townspeople as well'. (Koyama, 2007, p. 139) Marcin Kromer seemed to confirm this statement. In his book *Polonia*, he indicated: 'All people, both the poor and the rich, both the noblemen and the plebeians, above all the townsmen, make efforts to send their children to schools, to give them an education, and to accustom them to Latin from early childhood'. (Kromer, 1901, p. 49) Moreover, according to Satoshi Koyama, Polish was also commonly used as the official language and 'from the sixteenth century onwards, it became a lingua franca for almost all noblemen from the Baltic coast to the steppe frontier north of the Black Sea during the next century'. (Koyama, 2007, p. 140)

Considered to be economically stable and offering opportunities for enhancing livelihoods, the Commonwealth enticed migration. Among the unprecedented influx of refugees and migrants The Scots formed a conspicuous group. It is estimated that by the 1600s there were 30,000 Scots living in Poland. (Steuart, 1915) This great increase in Scots emigration to Poland was noticed by T. Fisher, who described it 'as making Poland the America of those days'. (Fisher, 1903, p. 31) What is more, the number of the Scottish immigration was so considerable that it even arose concerns in the English

Parliament of 1606. Arthus Wilson in the *History of Great Britain* reports: 'If we admit them [the Scots] into our liberties, we shall be overrun with them, as cattle (naturally) pent up by a slight hedge will spill over it into a better soil, and a tree taken from a barren place will thrive to excessive and exuberant branches in a better, witness the multiplicities of the Scots in Polonia'. (Wilson, 1653, p. 34) These 'multiplicities' of the Scots were also noticed by William Lithgow, a Scottish traveller, who visited Polonia in 1616. He reports: 'Being arrived in Crocko or Crocavia (...), I met with diverse Scottish Merchants, who were wonderful glade of mine arrival there'. He also notices that: 'Poland is a large and mighty Kingdome, puissant in Horsemen and populous of strangers being charged with a proud Nobility. (...) Here [between Cracow, Warsaw and Lublin] I found abundance of gallant, rich Merchants, my Countrey-men, who were all very kind to me, and so were they by the way in every place where I came. (Lithgow, 1906, p. 367-368) Lithgow's contemporary Fynes Moryson, seems to be in agreement with such observations, as in his itinerary, in 1617, he mentions that 'the Scots flock in great numbers into Poland'. (Moryson, 1617, p. 155)

Undoubtedly, there were many factors that induced this massive migration from Scotland. One major reason for this increase is the religious situation in Scotland. According to Bajer: 'The third decade of the sixteenth century in Scotland was marked by the arrival of Protestantism, which was opposed by the Catholic hierarchy. The execution of Patrick Hamilton in 1528, a convicted adherent of the new doctrines, led many Protestant leaders to take refuge abroad'. (Bajer, 2012, p. 48) It seems that for the next decades the situation did not improve. Charles I implemented changes that were not approved by the Scottish bishops. His decision in 1637 to impose Anglican observances in the Scottish Church, based upon the English Book of Common Prayer brought about Bishop's Wars (1639-40) (Hosh). Scots also 'fought in or were affected by the Thirty Years' War, a religious conflict that caused an estimated 8 million deaths'. (Wilson, 2012, p. 787) The religious toleration in Poland after the Confederation of Warsaw in 1573 meant that the ethnically diverse Commonwealth, often called 'the Paradise of the Jews' was the country where the Protestant Scots would also experience a warm reception. (Davies, 1982, p. 207). With reference to the religious freedom in Wilno, Eleazar Gilbert wrote: 'There be also therein many Religions professed and tolerated, where-unto also belong many Churches and places of Divine worship, as a Synagogue to the Jews, whereof there be many thousands in the City; a Church the Lutherans; all which doe enjoy their exercises of Religion without trouble or interruption'. (Gilbert, 1641, p. 7)

Apparently there was no other possible country in Northern Europe for migration at that time owing to the fact that 'Other European countries, including France, were fighting or preparing to fight religious wars, and the peaceful nature of the Polish Reformation and Counter Reformation must have appealed to Scots of all denominations'. (Ozog, 1995, p. 56) Analysing the phenomenon of religious toleration throughout the sixteenth and seventeenth centuries Peter Bajer concludes: 'Given the spirit of legality and humanism pervading Polish society, (...) Scottish Protestants did not have to fear inquisition, anathemas, religious terrorism or confiscation of property'. (Bajer, 2012, p. 75) There is little wonder than that Scots aware of this favourable situation regarding the freedom of religion chose the Commonwealth as their destination place.

Another key factor that caused larger Scottish migration was unfavourable socioeconomic situation caused by population growth. It is estimated that in the sixteenth century Scotland had '800,000 inhabitants with the number rising to a million in 1700'. (Bajer, 2012, p. 42) The most densely inhabited towns were Glasgow, Dundee, Aberdeen (each with up to 10 000 people) (Bajer, 2012, p. 42) and Edinburgh, which doubled in size at the beginning of the 16th Century. (Whyte, 2005, p. 41) The increasing population density resulted in a lack of income opportunities, poverty and the low standard of living conditions. Thomas Kirk, who travelled through Scotland for several months in 1677 commented: 'The poorer inhabitants go almost naked, only an old cloak, or apart of their bed-cloths thrown over them'. (Brown, 1973, p. 260) With reference to the houses of the common people he also wrote: 'Very mean, mud-walland thatch the best; but the poorer sort live in such miserable huts as never eye beheld; men, women, and children pig altogether in a poor mouse – hole of mud, heath, and some such like matter'. (Brown, 1973, p. 260) Another traveller to Scotland in 1568, Pierre de Bourdeilles, had a similar impression, as he reported: 'Scotland, with its gloomy skies, its poverty and squalor, its harsh and rugged aspects, was unfit to have produced the paragon of princesses'. (Bajer, 2012, p. 44)

What is more, Smout in '*A History of the Scottish People*' stresses that the difficult economic situation was caused by harsh climate, poor soil quality and primitive agriculture. (Smout, 1994, p. 135) To make matters worse 'severe famines hit Scotland in 1572, 1587 and 1595. (...) This famine, persisting for many years, was accompanied by 'the plague' (typhus) and smallpox'. (Anderson, 1997, p. 23) Such situation contributed to the fact that 'beggars and the vagrant poor were in infinite numbers, and the same reason of their extreme want and misery [were] bold and very impudent'. (Bajer, 2012, p. 46)

Apart from that, it is also necessary to underline the fact that the institution of primogeniture (based on the law that only the firstborn legitimate son could inherit his parent's property), which was generally accepted throughout Scotland forced the younger sons to migrate abroad for financial gain and the improvement of their living condition. Studying patterns of population movement in Scotland R. Houston and C. Withers came to a similar conclusion. They noticed 'what is known of vagrant mobility in the late seventeenth and early eighteenth centuries suggests a predominance of young single males (...); movement of whole families was unusual except in periods of severe dearth'. (Houston, 1990, p. 289) Analysing the patterns of migration, Biegańska also came to conclusion that the majority of those who arrived to the Commonwealth 'were young and even the very young-often alone'. (Biegańska, 1992, p. 159)

Among most important factors pushing the majority of Scots out of their country were also military ones. The poor economic situation, overpopulation and poverty meant that young men had no choice but to leave their homes to serve in the army 'or navy of either their own monarch or under the banners of a foreign ruler'. (Bajer, 2012, p. 46) According to historians in the first half of the seventeenth century, in Europe 'Scotland was one of the prime providers of military manpower in Europe. (Murdoch, 2001, p. 191) It is estimated that a substantial number of Scots fought in the Hundred Years' War, for the King of Denmark in his war against Sweden, or in Sweden's war with Muscovy. 'While Sweden, Denmark and Low Countries offered great opportunity for men prepared to serve as mercenaries – about 50,000 Scots are likely to have served during the Thirty Years' War in the anti-Habsburg armies – such an activity was extremely dangerous. To become a regular trooper in this war was like buying a one-way ticket to almost certain death'. (Bajer, 2012, p. 52)

The Commonwealth at that time offered substantial opportunities for soldiers of fortune and Scottish mercenaries joined the Polish armies. Moreover, it appears that their martial activities enjoyed the best of reputations. King Stefan Batory encountered them in 1577 during a brief war fought over the city's privileges and impressed by their military skills and courage, 'commented favourably on the fighting qualities of the Scots, expressing a desire for them to serve him in the campaigns he was planning against Muscovy and his wish was granted'. (Murdoch, 2001, p. 196) Spytko Wawrzyniec Jordan, one of King Batory's captains, reported that although most of them [Scots] were former peddlers, 'having abandoned or sold their booths, buckle on their swords and shoulder their musket; they are infantry of unusual quality,

although they look shabby to us... 2000 Scots are better than 6000 of our own infantry' (Biegańska, 1984, p. 87, 100) There were also Scots in Jan Zamoyski's army. One of them was Thomas Buck, who 'fought on the Polish side in the wars against Charles IX of Sweden, earning letters of commendation from the Lithuanian Grand Hetman Jan Karol Chodkiewicz'. (Murdoch, 2001, p. 197) Furthermore, the attempt of King of Poland Władysław IV to raise 14,000 infantry in Scotland for the Polish navy was another argument proving that the Scottish soldiers were highly valued. (Bajer, 2012, p. 69) Such positive portrayal of the Scottish soldier was also presented in Polish literature. For instance, Henryk Sienkiewicz in one of his dramas (*With Fire and Sword, The Deluge, Sir Michael*) 'features a dashing officer called Hasling-Ketling of Elgin, perhaps modelled on the seventeenth-century diary of Patrick Gordon', while the novelist Jerzy Rychliński 'published two books celebrating the memory of James Murray, the Scot responsible for overseeing the construction of Polish fleet in the 1620s'. (Worthington, 2016, p. 193) It seems that professional mercenary was a very popular type of career among young Scots. Brzeziński in his book 'British Mercenaries' (Brzeziński, 1986, p. 23) mentions Scottish military man, Colonel Henry Gordon of Huntly who in his letters 'commented on his stay in Poland with some fondness'. (Bajer, 2012, p. 30)

It seems that there was yet another factor that could have triggered Scotland to 'send forth swarms of migrants, of whom great numbers did haunt Pole. (Bajer, 2012, p. 75) Owing to the commercial ties between Commonwealth and the British Isles 'regular sea links were established between Gdańsk and Aberdeen as early as the beginning of the sixteenth century.' Moreover, the sea route, which took approximately three weeks, seemed to be 'the safest, shortest and thus the least expensive way of travelling to Poland'. (Bajer, 2012, p. 60) What is more, under the Polish-Lithuanian Commonwealth 'Vistula Trade' was established, which from the port of Gdańsk 'reached more than 600 kilometers inland'. (Bajer, 2012, p. 59) Water transport became 'accessible not only to wealthy merchants and nobles, but also to common folk'. (Bajer, 2012. p. 61)

Those regular sea links between Gdańsk and Aberdeen offered a huge scope for the Scottish merchants. Aware of the demand for foreign commodities, religious toleration, and thriving economy, the enterprising migrants engaged in commerce. (Bajer, 2012, p. 64) The less wealthy Scots 'became peddlars moving around the country selling their goods in villages or small towns'. Those itinerant tradesmen 'carried with them a variety of goods (...): some metal wares, largely domestic utensils made from tin and iron. (...) There were also numbers of youths such as weavers, cutlers and shoema-

kers'. (Oźóg, 1995, p. 58) Apparently they received a welcome reception as Andrew Fisher states that 'the Scottish Pedlar was well received by the country folk, who living many miles away from any town were glad to have the shop brought to their door'. (Fisher, 1903, p. 18) Scottish Resident in Poland, Patrick Gordon described the Commonwealth, 'as a country where any man could, by his own work, make his mark or fortune and (...) where foreigners were able to make financial gains'. (Bajer, 2012, p. 68)

Due to the peddling nature of their occupation, less wealthy Scots chose the itinerant way of life, and usually 'spent all year moving round the country selling their goods to country peasants and in villages'. (Oźóg, 1995, p. 58) The affluent merchants on the other hand adopted a more sedentary lifestyle and settled in big towns, where they left 'a contribution to (Polish) society, military, religious and academic life'. (Bajer, 2012, p. 6)

Of particular interest among Scottish entrepreneurs were Gdańsk (Danzing), Cracow, Lublin and Warsaw. Owing to the fact that Gdańsk enabled to maintain commercial links and served as a destination port of Scottish vessels, it became a permanent home of Scottish migrants. Beyond any doubt their presence left a lasting impression on Polish maps as even modern Gdańsk is the home of two suburbs named Nowe Szkoty and Stare Szkoty. (Kay, 2006) The movement of the newcomers is also reflected in other geographical locations. Peter Bajer enumerates other 'places that may bear witness to the migration such as Schottland (suburb of Gdańsk), Schottenkrug (village near Chełmno) or Szotniki (village in Lesser Poland). (Bajer, 2012, p. 88) Those exclusive ethnic enclaves dispersed much further inland and became an inevitable feature of economic development. As Murdoch explicitly stated: 'Sots rapidly spread out (...). There were strong concentrations (of Scots) in Cracow, Warsaw, Wielkopolska (Greater Poland), especially around Poznań'. (Murdoch, 2001, p. 194) Moreover, the traces of Scots were found in smaller country estate parishes as well. For instance, Murdoch in his book: 'Scotland and the Thirty Year's War' mentions Robert Porteous, a Scot who settled in Krosno and became 'a noted benefactor of the local community'. (Murdoch, 2001, p. 194) Porteous 'amassed a huge fortune by acquiring a virtual monopoly of the trade in Hungarian wine, the favourite drink of the Polish nobility'. (Murdoch, 2001, p. 194) The Scottish traveller Lithgow's observations seem to confirm the statement regarding the huge Scottish diaspora as his recollections show that he met 'an abundance of gallant rich merchants', his compatriots 'in practically every place he visited in the Crown'. (Bajer, 2012, p. 90)

Beyond any doubt, the Scottish immigrants made an immense contribution to Polish as well as Scottish culture owing to their means. Billy

Kay draws our attention to Robert Gordon who 'made a fortune through the Aberdeen-Danzig (Gdańsk) trade route, and donated some GBP 10,000 to the foundation of a hospital in his hometown' and William Forbes, known as Danzig Willie, who 'built the spectacular Craigievar Castle on the back of his trading profits' (Kay, 2013), while James Kabrun, a wealthy Gdańsk merchant financed the building of a theater'. (Marszalek, 2014) The affluent tradesmen of Scottish origin also gave their 'financial backing to projects concerning the Reformed of Poland-Lithuania'. (Bajer, 2012, p. 294) For instance, an influential parishioner of Szczepanowice, David Aikenhead of Tarnów made 'a bequest with the purpose of giving young people, university education. (...) His grant secured well-educated Protestant theologians for service in the Reformed Church in Poland-Lithuania and (...) allowed students to go to universities'. (Bajer, 2012, p. 295) Another notable figure of Scottish descent worth mentioning is William Bruce, a professor of Roman Law at the new university at Zamość, who wrote 'well-informed and detailed accounts of Polish politics'. (Tomaszewski, 2011)

Apparently, their input into the local community was acknowledged as Bogusław Radziwiłł, in his decree giving 'vast privileges to the foreigners in Węgrów', called Scots 'a fine ornament of the town,'. (Bajer, 2012, p. 282) Another example of recognition of Scottish traders' service to the court took place in 1576, when Batory granted to John Gibson, a Scottish merchant, the royal privilege, on the basis of which he could 'set and build shops or merchant's booths in public places and (...) sell wine and other liquors on their premises'. (Bajer, 2012, p. 183) Among many Scottish migrants, who managed to rise through the ranks to notable positions, was also Alexander Czamer, who not only served as a judge and a deputy in the coronation parliament of King August II, but also was four-time Mayor of Warsaw between 1671 and 1702. (Konopka, 2014)

Those entrepreneurial endeavours of Scottish merchants contributed to a growing economy of the Commonwealth, as they became a substantial group of taxpayers. The 1564 constitution proclaimed 'Scots, who carry their merchandise for sale on their backs, shall pay one złoty; and those Scots who use horses to transport their goods, shall pay sixty groszy from each horse used'. (Bajer, 2012, p. 98) In recognition for their service, they were granted citizenship. It is estimated that 'between 1576 and 1650 over eighty Scottish merchants' received that privilege in Krakow alone. (Ożóg, 1995, p. 63) Once the citizenship was granted 'a payment of money with a gun and gunpowder was paid to the city by the new citizen'. (Ożóg, 1995, p. 64) Peter Bajer points out that such payments depended on the financial capability of

the tradesmen. For instance, 'David Liddell had to pay 50 Hungarian florins', while 'James Carmichael and Peter Wood had to pay '20 Hungarian gold pieces (each)'. (Bajer, 2012, p. 187) Full civic rights enabled Scottish entrepreneurs to build up fortunes. Among most wealthy Scottish merchants in the Commonwealth were: 'Robert Porteous of Krosno (valued at 90,000 zł), Thomas Gellatly of Gdańsk (24,000 zł), and Robert Blackhall of Cracow (20,380 zł). (Bajer, 2012, p. 201) In order to understand the size of their fortunes it is necessary to mention that in the middle of the seventeenth century one could purchase a horse for 30 zł and 120 kg of wheat for about 1 zł. (Bajer, 2012, p. 201)

Moreover, the most wealthy and prominent tradesmen became the Royal Merchants, 'so named because they had been given the privilege of serving and following the Court'. (Ożóg, 1995, p. 61) This position was of great importance and granted them the liberty to 'open booths and shops in any town where Diet was sitting; they could follow the Court on military campaigns and could act as purveyors to the Court in both peace and war'. (Ożóg, 1995, p. 61)

Both the commercial ventures of Scottish tradesmen and their contribution to domestic revenue increase had to be significant enough for the foreign officials to take notice of it. The exiled Charles II 'was in great need of political and financial support'. (Bajer, 2012, p.190) The Polish government endorsed his idea of collecting money from his Scottish subjects residing in the Commonwealth. However, due to objections from Scottish merchants King Jan Kazimierz decided that the only way to aid Charles II was to force them by means of legislation. In 1651, Polish Subsidy to King Charles II was voted according to which 'the Scottish merchants who resided in the Kingdom of Poland and Grand Duchy of Lithuania (...) were to be required to declare, on oath, the total worth of their possessions and pay a sum in the amount of 10 per cent of its gross value, within eight weeks, to municipal officials of royal towns and to the owners, or their representatives, of towns belonging to lay or ecclesiastical lords (...) Those who did not comply with the law would face serious penalties'. (MacRobert, 1998, p. 10,11) As a result, the 'sum of 102,220 zł 29 gr 12 d.' was collected (Bajer, 2012, p. 193). Nevertheless, the tax levied on Scottish merchants on behalf of Charles II put many of them into financial difficulties and brought about changes that altered their favourable position on the market diametrically.

Both the growing hostility of other merchant groups and unfavourable government policies forced the Scottish tradesmen into 'trading unions, Scottish Brotherhoods, in twelve cities of the Kingdom, including Cracow, Poznań and Lublin'. (Ożóg, 1995, p. 65) The idea of this institution was to

represent and protect the commercial interests, preserve national identity and enable its members to practice their creeds. (Bajer, 2012, p. 235)

In the late seventeenth century, the Scottish community in the Polish-Lithuanian Commonwealth begun to dwindle. It seems that a number of factors prompted that change. Apparently, the long-lasting war with Sweden had devastating and irreversible effects upon both the country's economy and their trade that became no longer profitable. Also, 'the members of the Brotherhood suffered a great deal of religious persecution (...) mainly at the hands of the Jesuits who were doing everything possible to crush Protestantism in Poland in 1687. (Ożóg, 1995, p. 70) As a result of changing political situation and conflicts within brotherhoods most Scottish migrants converted into Roman Catholicism, lost their distinct identity and became more integrated with native population. It is claimed that 'assimilation, shown in the Polonisation of Scottish names, was the main reason for the disappearance of the Scottish ethnic group in Rzeczpospolita' (Bajer, 2012, p. 19). Thus, MacLeod became Machlejd, MacAulay became Makaliński, Cochrane became Czochran etc.'. (Marszałek, 2014)

To sum up, it must be acknowledged that Scottish merchants who remained in Poland for 200 years made a valuable contribution to the economic development of the Commonwealth, commercial expansion of cities and the emergence of wealthy, multi-ethnic and well-educated urban society. The favourable conditions of Poland enabled them to obtain full civic rights and gain the highest distinctions not only in public but also in military realms. (Bajer, 2012, p. 13) Admittedly, their presence in the Commonwealth made its way into the historical consciousness and constituted a mutual Polish-Scottish cultural heritage.

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Polish Immigration to Chicago and the Impact on Local Society and Culture

Polska imigracja do Chicago i jej wpływ na społeczność lokalną i kulturę

Abstract

Polish immigration to the United States has occurred largely within three waves, spanning from 1880-1920, the late 1940's, and in the 1980's. While these immigrants settled across the country, a majority found comfort in Chicago, where many Poles have settled since the early 1800's. Living in Chicago and other major cities, Polish immigrants and Polish Americans began to impact their community in significant ways across all aspects of life. Over time these immigrant groups managed to make federal policy changes, impact the Polish language spoken in American cities, and of course change the impact of religion on society coming from a largely Roman Catholic identity in Poland. This article discusses the three major waves of immigration while touching on the impacts of each group on Chicago and beyond.

Key words: *immigration, Chicago, Polish Americans, society, culture.*

Abstrakt

Imigracja polska do Stanów Zjednoczonych odbyła się w trzech rzutach przypadających na lata 1880-1920, późne lata czterdzieste (1940-) i w latach osiem-

dziesiątych (1980-). Wówczas, emigranci ci osiedlali się na terenie całego kraju ale większość zdecydowała się na Chicago, gdzie wielu Polaków osiedliło się już we wczesnych latach osiemdziesiątych XIX wieku. Żyjąc w Chicago i innych większych miastach, polscy imigranci i polscy Amerykanie zaczęli w znaczący sposób wpływać na różnorodną formę egzystencji. Z biegiem czasu, tym imigranckim grupom udało się wpłynąć na zmiany w policji federalnej, w języku polskim używanym w miastach amerykańskich a także zmienić stosunek do religii wyznawanej przez społeczność wywodzącą się w znacznej mierze z kościoła katolickiego w Polsce. Niniejszy artykuł omawia trzy główne fale imigracji, skupiając się na wpływach każdej z grup na Chicago i okolice.

Słowa kluczowe: *imigracja, Chicago, polscy Amerykanie, społeczeństwo, kultura.*

Introduction

Polish immigration to the United States has fluctuated over the last two hundred years, impacting the cultures and societies of the cities where the Polish immigrants settled, mainly Chicago, New York City, and Boston. This immigration began as early as the 1830's when Polish refugees from the Polish-Russian War settled in Chicago with the hope of attaining economic independence. One of the first Polish men arriving in Chicago was Anton Scherrman, born about 50 miles outside of Poznań. He developed the Polish Agency, an organization that tasked itself with bringing immigrants of Eastern and Central European descent to Chicago. (Pacyga, 2019) Scherrman's Polish Agency was successful and many Poles settled in Chicago with more following to be with their friends, neighbors and family. Later immigration to the U.S. largely followed patterns set by the first groups of immigrants because the patterns provided some sense of community whether prompted by a familiar language or by family ties dating back to the earliest settlements. This sense of community drove most later immigrants to settle in Chicago. (Pacyga, 2019)

Large waves of immigration occurred in three time periods: 1880-1920, post World War II, and in the 1980's. In each wave the main influx of Polish immigrants was to Chicago thanks to the work of Scherrman. Due to these migratory influxes, Warsaw is the only global city today containing a larger population of people of Polish descent than Chicago. (Pacyga, 2019) Polish immigrants chose to settle in Chicago because they could see it as

a way of still experiencing their culture while assimilating to American life. As the immigrant population grew, the culture in the city was changed in significant ways with the largest impacts in the political sphere, in language, and in the Catholic churches of Chicago and across the U.S.

First Wave of Immigration

The first significant influx of Polish immigrants was from 1880-1920. Like the earliest Polish immigrants, these Poles, who were poorly educated and from rural areas, came to the United States seeking economic opportunities. Improved means of transportation and industrialization, developed during the second half of the nineteenth century, facilitated their immigration and other mass immigration from Eastern and Central Europe. (Pacyga, 2003) As trains connected areas of Europe that were previously difficult to reach, they provided new opportunities for rural Polish peasants to travel to major port cities to utilize new steel-hulled steam ships to reach America. In the U.S., railways created connections to Chicago from port cities. This allowed for mass movement of goods and people. Trains brought recently arrived immigrants, mostly low wage workers, to Chicago to fill factory positions. This improved transportation led to over one million Poles arriving in the U.S. over a period of forty years as simultaneously capitalism drove a greater need for cheap labor in a society that was industrializing. (Pacyga, 2003) Many of this wave of Polish immigrants settled predominately near major industrial sites in five areas of Chicago. Other immigrant groups-German, Irish, Czech, Ukrainian, and Scandinavian – had populated these working class neighborhoods earlier, but the influx of Poles quickly influenced them. As more Poles entered Chicago they created cultural centers, anchored by Roman Catholic churches, Polish language newspapers, and ethnic markets. (Pacyga, 1996) Many newspapers at the time described these neighborhoods as, “spatially integrated, but socially segregated”. (Pacyga, 1996) These neighborhoods grew as more Poles began to join their families and friends in Chicago. However, this growth would not last.

Immigration began to slow following World War I as sentiments towards immigrant populations shifted in the United States. A distrust of Eastern and Central European populations grew across the continent, contributing to stricter immigration laws. This distrust stemmed from the activities of many immigrant activists and anarchists fighting for worker’s rights and unions. Activists such as Emma Goldman (a Russian born anarchist) and Leon Czolgosz (an American born to Polish parents), raised concerns for

public safety and were consequently strictly monitored by the police, who often brought armed surveillance into Eastern and Central European neighborhoods. (Goldman, 1931) This distrust resulted in the enactment of significant legislation using a quota system to slow immigration. In addition to this strict quota system limiting movement from Europe, other strict immigration laws, such as literacy testing and higher taxes for new immigrants, were implemented in 1917. The Immigration Act of 1924 allowed for only two percent of the Polish population cited in the 1890 U.S. census to enter each following year. (U.S. State Department)

Second Wave of Immigration

Polish immigration to the United States began increasing following World War II. After the atrocities committed against the Polish people during the war, over 1.9 million Poles were living as displaced people and refugees throughout Germany and Soviet occupied countries. The United Nations originally created camps and assembly centers to house and assist them, but after significant lobbying by Polish Americans from Chicago, some refugees were allowed to immigrate to the U.S. (Pacyga, 2019) In 1948 President Truman signed into law a bill allowing over 200,000 displaced Poles to enter the country, and in 1950 Congress extended that number to over 300,000. (Pacyga, 2019) However, many Polish displaced people were unable to get into the United States through this law. Instead many entered other countries, including Canada, Australia, India, and the UK. In the years following their relocations, whenever the opportunity arose, quite a few of the Poles who had settled elsewhere chose to immigrate to the United States to rejoin family or friends or to seek better economic opportunities. (Jaroszyńska-Kirchmann, 2004)

Many of the immigrants arriving in the United States after World War II were veterans of the war or refugees and consequently shared a different background with the new community they joined. Having experienced tragic destruction and loss of their way of life, they sometimes clashed with those labor migrants of a similar ethnic background who had immigrated earlier. Those earlier immigrants that came as a part of the first wave that left Poland before it was an independent country, which limited their ties to a national identity, unlike those of the second wave who had fought for Poland and lost loved ones in the name of the country and its people. (Erdmans, 1995) The clash between the groups resulted in the first wave group being referred to as *Stara Polonia* (Old Polonia), while the second wave of

immigrants became known as the *Nowa Emigracja* (New Emigration). (Pacyga, 2019) Only old Polonia Poles had memories of the largely agricultural experience of their grandparents and parents because Poland had changed since their emigration into a more urbanized and industrial part of the world, the Poland where much of the New Emigration came from. There were also significant socioeconomic and educational differences between the groups. Immigrants in the post-WWII group were more highly educated and literate, which allowed them to overcome the U.S.'s immigration policies. Those who had come in the first wave were poor farmers who had become low-wage laborers. Many of the descendants remained in low-wage factory jobs due to limited upward mobility in U.S. cities at that time. (Erdmans, 1995) Often the *Nowa Emigracja* refused to live in the same areas as the poorer Polish Americans because of these differences. (Pacyga, 2019) These differences resulted in the establishment of a class system among the Polish population in Chicago and impacted who was able to participate in politics.

Third Wave of Immigration

The third wave of immigrants has benefited all classes of Polish society, while exclusively identifying with the upper classes. These immigrants came in the 1980's seeking both economic gain and political safety, which eroded in Poland at that time due to the country's shifting government. *Solidarność*, an organization attempting to end communism in the country, had formed and become active. Some of the organization's people were at times forced to leave the country to escape persecution for their political beliefs, and many of them ended up in cities like New York, Boston, and Chicago. (Erdmans, 1995) These immigrants were politically active and highly educated and joined the upper ranks of Polish society in the U.S. Their political engagement in Chicago and other cities benefited those of Polish descent as well as Poles in the mothercountry. (Erdmans, 1995) An organization called Polish American Congress became heavily involved in federal U.S. policy making regarding *Solidarność* and the ongoing crisis in Poland. (Pienkos, 2011) However, despite active political engagement, differences over language use, religion, music and literary tastes, and social values kept the newest Poles from connecting as a group with older immigrant groups who had assimilated in different ways to American culture. (Erdmans, 1995)

Impacts of Immigration on Culture – Politics

All generations of Polish immigrants have been involved in creating some major U.S. policy changes since their arrival. Even early interactions with the government resulted in big changes to the experiences of Poles in the United States and those abroad. Throughout the late 1800s and early 1900s, Poles were involved in several workers' rights campaigns. These campaigns included attempts to gain an eight hour work day, a six day work week, and safer working conditions. Some of these campaigns ended violently, like the Haymarket Rally in Chicago which resulted in a riot when bombs went off in the crowd (Goldman, 1931), but ultimately many of the goals in these movements were met by new federal regulations for the workplace. While many of these movements often looked like strikes and rallies organized by anarchists of Eastern and Central European descent, at times the political work of Polish immigrants remained more within the culturally accepted means of change. The novel *The Jungle* by Upton Sinclair supported these campaigns and drew public attention to them by describing immigrant experiences in the Chicago meat-packing industry. Immigrant campaigns and the public attention created by Sinclair's novel resulted in the development of the Pure Food and Drug Act, a law that continues to facilitate inspections of warehouses and industries to ensure safe conditions for employees and clean food products. (Sinclair, 1906)

Polish influence in politics reached U.S. foreign policy in 1918. With the help of Polish leaders like Ignacy Paderewski, American Poles successfully lobbied President Woodrow Wilson to incorporate Poland's independence into his proposed Fourteen Point Plan as the plan's thirteenth point. (Pienkos, 2011) The inclusion for this thirteenth point was largely a result of work by Polonia, a political advocacy group created in Chicago, and the Polish American banker, Jan Smulski. (Pienkos, 2011) Between the world wars, many Poles in America were focused on gaining economic success rather than political action. This sentiment changed when the Second World War began and Poles in America found another cause worth fighting for.

After the beginning of the war in 1939, Poles in America took up the cause of supporting an independent Poland and pushing for policy to support the Exiled Polish Government and Polish refugees. The main coalition to head the lobbying was the Polish American Congress (PAC), established in Buffalo, New York in 1944. Before FDR's sudden death in 1945, the PAC was unable to meet with President Franklin D. Roosevelt due to FDR's negotiations with Stalin on Soviet-proposed borders that encroached on

formally Polish lands. Until after his reelection in 1944, FDR successfully avoided informing the PAC of his plans to allow the Soviet-proposed borders. As a result, ninety percent of Polish Americans voted for FDR in 1944. (Pienkos, 2011) In FDR's last speech to Congress on the outcome of the Yalta Conference in March, 1945, only a month prior to his death, he officially confirmed the U.S. plans for postwar Poland. The president of the PAC, Charles Rozmarek, denounced the president's actions in a letter and on several radio broadcasts across the U.S. He eventually made his way to NYC and Europe to speak in front of the United Nations and European governments on behalf of a restoration of Polish borders. These speeches helped convince the next U.S. president, Harry Truman, to adopt many political goals of the PAC. Not only did Truman allow for an increase in immigration numbers for the resettlement of Polish war refugees, but he also ordered a Congressional investigation of the Katyń murders, eventually finding the Soviet government responsible for these horrific war crimes. (Pienkos, 2011)

Over the next several years, Polonia and the PAC were able to get more and more presidential support for Polish causes. This culminated in the 1980s as the United States began to involve themselves with the goals of Solidarity in Poland. Through PAC pressure, President Carter spoke in Chicago in late 1980 to support the trade movement and the strike that was implemented to obtain greater human rights in Poland. In that speech, he warned Moscow to avoid involvement in the Polish affairs. (Pienkos, 2011) When President Reagan stepped into office, he brought high ranking PAC members into the White House to help develop policies to assist the trade movement in Poland and put an end to communism in the country. After the Round Table Agreement in 1989 allowed Solidarity to take charge of the government, Poles in America shifted their lobbying goals to help the new Polish economy thrive. Through PAC's tireless work, Congress passed the Support East European Democracy Act, providing the new Polish government with financial assistance to aid in the transition. To this day, PAC continues to impact foreign and domestic policy in America, most recently with the admission of Poland into NATO.

Impacts of Immigration on Polish Culture in the United States – Language

The Polish language was impacted significantly within the U.S. immigrant groups over time as the Polish language in Poland itself changed between waves of Polish immigrants arriving in the United States. The immigrants

in the Old Polonia wave still spoke and continue to speak an “archaic Polish” that was often criticized by more recent immigrants for being out of touch with the current-day language and compared to the old Polish found in literature classes. (Erdmans, 1995) Clinging to a more archaic form of Polish was due to the rural origins of the immigrants in the first wave and the lack of Polish classes in public schools. Due to anti-immigrant sentiment, the children of immigrants were not allowed to speak their parent’s language in the classroom, leading to parents passing down dialects that were often out of date. Polish Americans were also more likely to use English syntax while still utilizing Polish words because that is how they were taught to order sentences in public schools. (Erdmans, 1995) New immigrants still see this dialect to be old and a sign of limited education in Polish culture, when in reality it is a new culture created by assimilating to American culture.

English spoken in Chicago by immigrants was also impacted through living and working throughout the city over the years. The most obvious impact is in the development of *po Chicagosku*. While this version of English is never used in text, it combines English vocabulary with Polish endings. It is the result of many immigrant’s descendents losing Polish vocabulary over time and realizing that children and English speakers understand the English vocabulary better. (Pacyga, 2019) Works like “parkowac” were developed to mean the verb to park. (Erdmans, 1995) This practice often developed separately in all English-speaking cities where large groups of Polish immigrants migrated.

Impacts of Immigration on Culture – Religion/Education

As the Roman Catholic Church remains a central aspect of Polish culture in Poland, it impacts Polish communities in the United States as well. The immigration over time however, changed the landscape of religion and education in the cities where large numbers of Polish immigrants settled but in Chicago especially, as it holds the largest population of Polish Americans in the United States. Today Chicago has over fifty entirely Polish or Polish dominated Roman Catholic Churches. (Pacyga, 2019) These staples of religious life date back to as early as the first Polish immigrant communities in the 1880’s, when they wanted to remove their children from the Irish Roman Catholic influences. (Pacyga, 1996) In order to continue spreading Polish and Catholic knowledge to the next generations of Polish Americans, numerous Polish Catholic schools were developed in the North, West, and South sides of the city. These schools are still taught by Polish nuns today.

They teach students of all ethnicities and races, diverging from solely Polish students in the twentieth century. (Pacyga, 2019)

Despite the significant cultural differences in the waves of Polish immigration, the Church and Catholic schools were often the arena where the most interaction between the waves of immigrants occurred. This increased interaction naturally led to conflict in the religious sphere of Chicago. For example, the third-wave immigrants to the United States believed the Church should be consistent on both sides of the ocean. In the 1980s Poland many priests supported the *Solidarność* movement and would demonstrate that support to the community. However, American churches largely avoided participating in politics and refused to hang political banners inside their buildings. There was also significant conflict over the Polish dialect spoken by priests, as it was often the archaic version seen as inferior by new Polish immigrants. Finally the debate over specific Catholic traditions led to further tension in the Church. One such tradition was the weekly sermon, often used by American priests to collect money for community projects and Church services. The priests often viewed recent immigrants as not donating enough following these sermons, while the recent immigrants saw the practice of using sermons to collect money as greedy. They believed sermons should interpret scripture and not ask for donations. Another tradition that had changed over time in the United States was the practice of confession. Confessions in the United States are heard once a week instead of daily as in Poland. (Erdmans, 1995) These cultural differences in religious practices resulted in only minor debate as the Catholic Church remained such a vital part of Polish identity for all Polish Americans.

Conclusion

Polish immigration continues to shape and impact American way of life, and in few places as much as in Chicago. The waves of immigration over time reflected significant points of history in Poland and resulted in Polish sub-cultures after assimilation despite common ancestry. Impacts of these hardworking immigrants are evidenced in all realms of Polish American society and history. As a group, Polish immigrants were able to change U.S. federal policy despite significant fractures in their communities. The Polish language, shaped by the experiences of those first immigrants, resulted in further tension and conflict between immigrant waves. This tension overflowed into the religious society of Polish Americans. Despite being a pillar of Polish identity, it was changed through the transition to U.S cities from Europe

and new Poles often had difficulty understanding this shift. Overall these impacts show Polish migration can contribute to the new society it enters, developing community amongst its participants while affecting the shape of their own world.

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**The “explosion” of St John Paul II’s *Theology of the Body*
in the Catholic Church in America
and its global implications for the New Evangelisation**

**„Eksplozja” *Teologii Ciała* wg Św. Jana Pawła II,
w Kościele Katolickim Ameryki,
i jej światowe implikacje do celów Nowej Ewangelizacji**

Abstract

In 1999 George Weigel made a prediction in his now famous biography of St John Paul II – *A Witness to Hope* – which was eerily prophetic. Commenting on John Paul’s *Theology of the Body* – which is the Pope’s prolific Christian anthropology on sexuality and morality – George Weigel stated that, “These catechetical addresses constitute a kind of theological time bomb set to go off, with dramatic consequences perhaps in the twenty-first century.” (Weigel, 2005, p. 343) The focus of this paper will be on a particular group of Catholic speakers in America (Christopher West, Jason & Crystalina Evert, Brian Butler etc) who have taken this teaching very seriously and are helping it “ignite” and spread like wildfire causing a “sexual counter-revolution” that’s changing lives around the world. (West, 2016, n.p) In this paper my aim is to analyse this phenomenon so that those involved in the New Evangelisation in other parts of the world can perhaps learn how to implement *The Theology of The Body*, and so too benefit from JP II’s prolific teachings.

Key words: *Theology of the Body, Anthropology, Christianity, New Evangelisation, Sexual Revolution.*

Abstrakt

W 1999 r. George Weigel przepowiedział w słynnej biografii św. Jana Pawła II – Świadek nadziei – który był niesamowicie proroczy. Komentując teologię ciała Jana Pawła – która jest najbardziej płodnym chrześcijańskim nauczaniem antropologicznym papieża o seksualności i moralności oraz „biblijnym badaniu tego, co to znaczy być mężczyzną i kobietą”, wygłoszonym przez 130 słuchaczy w środę przez papieża – George Weigel stwierdził, że: „Te katechetyczne adresy stanowią rodzaj teologicznej bomby zegarowej, która wybuchnie, z dramatycznymi konsekwencjami być może w XXI wieku”. (Weigel, 2005, p. 343)

Mój artykuł ogniskuje się na konkretnej grupie mówców katolickich w Ameryce (Christopher West, Jason i Crystalina Evert, Brian Butler itp.), którzy potraktowali to nauczanie bardzo poważnie i którzy pomagają nauczaniu „rozpalić się” i rozprzestrzeniać jak pożar. Tworzy się nauczanie, które jest nazywane przez lidera tego ruchu Christophera Westa „kontrewolucją seksualną”, która zmienia życie na całym świecie. (West, 2016, np.) Moim celem jest przeanalizowanie tego zjawiska, aby osoby zaangażowane w Nową Ewangelizację w innych częściach świata mogły nauczyć się, jak wdrażać Teologię Ciała, a także mogły odnieść korzyści ze zmieniających życie pomysłów JP II.

Słowa kluczowe: *Teologia ciała, Antropologia, Chrześcijaństwo, Nowa Ewangelizacja, Rewolucja Seksualna.*

Introduction

In 1999 George Weigel made a prediction in his now famous biography of St John Paul II – *A Witness to Hope* – which was eerily prophetic. Although it has been quoted many times to the point Weigel has joked that he actually regrets making this prediction it nonetheless remains significant. Commenting on John Paul’s *Theology of the Body* – which is the Pope’s prolific Christian anthropology on sexuality and morality delivered over a period of 130 Wednesday audiences he gave as Pope – George Weigel stated that, “These catechetical addresses constitute a kind of theological time bomb set to go off, with dramatic consequences perhaps in the twenty-first century”. (Weigel, 2005, p. 343)

The Theology of the Body (TOB) is based on the moral teaching of the Catholic Church and is nothing new in terms of doctrine but its genius lies in the fact that it speaks to the subjective mind-set of our times. The Pope posits that since God's nature is revealed through the body in the person of Jesus Christ so too do our bodies reveal a deeper truth about our nature as persons. Our bodies are not just insignificant clusters of random cells, but signs pointing us to who we really are. By drawing attention to the fact that we as human beings are composites of both body and soul, the Pope gives an adequate response to the new wave of *Manicheism* that has infiltrated society as a result of the Sexual Revolution – where society now believes that what we do with our bodies has no impact on our souls. Or, that there is no soul in fact. George Weigel hypothesised that if these teachings are “taken with the seriousness it deserves, John Paul’s *Theology of the Body* may prove to be the decisive moment in exorcising the Manichaeian demon and its (the) deprecation (condemnation) of human sexuality from Catholic moral theology”. (Weigel, 2005, p. 342)

The focus of this paper will be on a particular group of Catholic speakers in America (Christopher West, Jason & Crystalina Evert, Brian Butler etc) who have taken this teaching very seriously and who (thanks to a number of reasons which I will elaborate on later) are helping the teaching “ignite” and spread like wildfire. The teachings are creating, what the front man of this phenomenon Christopher West calls “A «sexual counter-revolution» that’s changing lives around the world.” (West, 2016, n.p) This paper will cover: A brief summary of the *Theology of the Body*, an overview of the history that prompted its necessity and the climate it was received into i.e. the Sexual Revolution, the unique form the movement has taken on in the US and its impact beyond its borders. My aim is to analyse this phenomenon so that those involved in the New Evangelisation in other parts of the world can perhaps learn how to implement *The Theology of The Body*, and so too could benefit from JP II’s life changing ideas.

The fallout from the *Sexual Revolution*

Richard A. Spinello opined that the Pope recognised that modern man is undergoing an identity crisis. He fails to understand himself and his role in the world. Man is in a haze, a fog that is a result of profound scepticism and “stands on the precipice of a desolate nihilism.” This haze or fog needs a radical reality check; A reality check that reveals “the truth about man” (RH 1). Spinello believes that John Paul II’s writings can give modern society the clear vision they have been robbed of for over a century,

Throughout the encyclicals the Pope explains that Modern man has lost sight of the provident Creator, seduced into thinking that he is the centre of the universe. He has been given false hopes by philosophers such as Freud, Sartre, and Marx who promise temporal bliss through pleasure, unfettered freedom, or an egalitarian utopia. (Spinello, 2016, p. X)

Nowhere is man's identity crisis more evident than in the sphere of sexuality. Whether one is Catholic or not, one cannot deny the fact that there have been a large number of societal consequences due to the Sexual Revolution. This turning point in history is defined by Mary Eberstadt as "the ongoing destigmatization of all varieties of nonmarital sexual activity, accompanied by a sharp rise in all sexual activity, in diverse societies around the world (most notably the most advanced)". (Eberstadt, 2012, n.p) Aiming to provide empirical evidence for the fallout in her book *Adam and Eve after the Pill*, she quotes the infamous 20th century sociologist Pitrim Sorokin who called out the fact that what was seen as sexual liberation could be linked to "critical social ills, including rising rates of divorce and illegitimacy, abandoned and neglected children, a coarsening of the arts high and low, and much more, including the apparent increase in mental disorders." (Eberstadt, 2012, n.p) It is not lost on Eberstadt that if one were to make these comments in this day and age, one's views would be seen as bible-bashing, religious intolerance and anti-progressive. Even academia seems to thrive on the breakdown of societal and biological norms with the incorporation of subjects such as "gender studies" into the academic syllabus of many humanities departments. It seems by extension that Eberstadt is right in pointing out that despite damning evidence, the educated elite refuse to acknowledge the fallout. (Eberstadt, 2012, n.p)

While we have to keep in mind that many people have overcome a broken childhood and/or broken relationships/marriages to lead emotionally stable and successful lives we cannot ignore the fact that (as Eberstadt stresses) there is data proving the significant advantages of having a two-parent household and stable monogamous marriages,

The empirical record today on sex, documents the overall benefits of marriage and monogamy ... As numerous social scientists have shown ... monogamous married people score better on all kinds of measures of well-being. A wealth of other data testifies to the proposition that families headed by a married couple – including disadvantaged families – are better off than those headed by a cohabiting couple... (Eberstadt, 2012, n.p)

She refers to evidence that ties early promiscuity to poor academic results and how it is a gateway leading to a turbulent lifestyle, “Promiscuity among teenagers and young adults appears closely related to educational failure and other problems such as alcohol and drug abuse.” (Eberstadt, 2012, n.p) She also draws attention to the fact that divorce and unwed motherhood “two more offspring of the sexual revolution” has not only been destructive for those actually in the situations but for the society at large. (Eberstadt, 2012, n.p)

Many writers and speakers on the *Theology of the Body* have referred to the fact that the sexual revolution did not empower women but demoted their status from subjects to objects. Women, rather than becoming free agents of self-empowerment, have become dispensable sexual objects. Eberstadt is in complete agreement with this analysis and blames contraceptives for this objectification. While contraceptives were supposed to free women from the consequences of pregnancy it also gave men a free pass to take no responsibility. Eberstadt writes that one need look no further than popular talk shows or TV series to observe this phenomenon, “All reveal a wildly contradictory mix of chatter about how wonderful it is that women are now all liberated for sexual fun – and how mysteriously impossible it has become to find a good, steady, committed boyfriend at the same time”. (Eberstadt, 2012, n.p)

History of the Sexual Revolution

So how did this revolution come to manifest itself in American society? What were the events that led people to break free from the common values regarding sexuality and morality? It’s not as though sexual sin or deviation did not exist prior to the sexual revolution but what was unique about this period was the inversion of the norm established by Christendom. Purity, celibacy and the sacrament of marriage were no longer upheld. Father José Granados (Assistant Professor of Theology and Philosophy of the Body at the Pontifical John Paul II Institute for Studies on Marriage and Family) goes into depth about how this inversion came about in his article entitled *Theology of the Body in the United States*. For the purposes of this paper I would like to highlight only a few key stages that Granados mentions:

1. Puritanism: Whilst Granados avoids labelling the Puritans as radical “repressors of sexuality” he does mention that they saw sexual desire as “intrinsically and unavoidably disordered”. (Granados, 2015, p. 1) This was due to their understanding of *concupiscence* – or – the “tendency of human nature to sin as a result of original sin.” (Catholic Dictionary, 2018, n.p) If Grace cannot heal concupiscence Granados observes that,

for the Puritan, the only way to get the “lustful desires of the heart” under control was through the law,

The remedy for the sins of the flesh ... condemned in Puritan sermons was unambiguously a matter of increased control. Control was, first, to be imposed by parental authority. ... (*then*) the magistracy. ... Most significantly, control was to be enforced from within, against the nature that struggled for expression. (Granados, 2015, p. 2)

2. The Enlightenment: Granados harkens back to another form of control, this time caused by thinkers of the Enlightenment. Because they placed reason above all else they had to ensure that their “passions and affections” were submitted to reason as well, hence their use of control through “the Law” to ensure sexual morality. This period also succeeded in severing “sexuality and the family” from God. (Granados, 2015, p. 2)
3. The Romantic Movement Granados reminds us that it was during this time that love was relegated to the realm of emotions and feelings thereby making it a great external force that “imposed itself on the lovers”. Love and Reason were further polarised. (Granados, 2015, p. 2)
4. Freud: After the fall of the exaggerated puritanical Victorian society America was ready for the ideas of Sigmund Freud which were “very critical towards the Puritan ethos, which he held responsible for repressing the sexual drives of individuals.” Although Freud did not necessarily endorse “free love” his ideas did just that. Popular culture deduced that man’s sexuality had been imprisoned by societal constructs and needed liberation. (Granados, 2015, p. 2, 3)
5. The Crisis of the 1960’s aka The Sexual Revolution: Sexual pleasure now reigns supreme and reproduction is demoted thereby making sex difficult to contain within the familial structure. (Granados, 2015, p. 3)
6. The Economic side of the revolution: At this point, “The industry of pornography and the exploitation of sex by television and marketing companies” becomes part of the American narrative,

Within this process, the focus shifted from a conception of sexuality as something to be controlled and repressed or contained within marriage, to a vision of sexuality as an impulse vital for the flourishing of the human person, and whose unlimited expression was both an inalienable right and an irrepressible need of the individual. (Granados, 2015, p. 3)

7. Father Jose also points out two “other sexual revolutions” i.e. the gay movement and feminism which emphasise that “sexuality is a place for the free expression of subjectivity, a realm open for transformation”. (Granados, 2015, p. 3)

Despite all of the confusion caused by this inversion Father Jose opines that there was still grit left in American society. Something made them not want to let go of the ideal of the family and although a “resurgence of Puritan ideas” is definitely one of the reactions, another is the propagation of St John Paul II’s *Theology of the Body* by the New Evangelists in the Catholic Church. Father Jose writes that perhaps, “this concern for the family can also account for the success of John Paul II’s proposal in the United States, for the Pope’s catechesis emerges precisely as a response to this situation, as a coherent vision of human sexuality” (Granados, 2015, p. 4)

The New Evangelisation and *Theology of the Body* (more in depth)

The group of American Evangelists that I mentioned at the start are first responders to the chaos caused by the Sexual Revolution as well as first responders to the call for a New Evangelisation (a movement to bring Catholics who have fallen away from the Church back into the fullness of the faith¹). Christopher West is one such New Evangelist and interestingly in his presentations, books and dvd series *The Gift* (which breaks the *Theology of the Body* down into a more understandable format) he parallels the lives of Hugh Hefner and John Paul II; emphasising the drastic contrast in approach they took in trying to heal the pain caused by the “demonization of the body and sexuality”. (West, 2014, n.p)

At the same time as Hugh Hefner was launching his pornographic empire, Christopher observes that John Paul II was writing the *Theology of the Body*. Hefner actually referred to his puritanical upbringing as being the source of motivation for starting *Playboy magazine*, “it was a response to the hurt and hypocrisy of our Puritan heritage”. (West, 2014, n.p) The lack of affection he received made him ache for human interaction, “When I talk about the hurt and hypocrisy in some of our values – our sexual values – it comes from the fact that I didn’t get hugged a lot as a kid.” (West, 2014, n.p) West goes on to say that Hefner’s rejection of Puritanism should

¹“Where entire groups of the baptized have lost a living sense of the faith, or even no longer consider themselves members of the Church, and live a life far removed from Christ and his Gospel. In this case what is needed is a ‘new evangelisation’ or ‘re-evangelisation’.” (Pope John Paul II, 1990, pt. 33)

actually be the Catholic response, “The fear of and rejection of the body and sexuality typical of Puritanism is laced with interrelated heresies long condemned by the Catholic Church (dualism, Gnosticism, spiritualism, Manichaeism, Jansenism, etc.)”. (West, 2014, n.p) However Hefner’s approach, according to West, is simply replacing one extreme for another “repression (with) indulgence”. (West, 2014, n.p) Both puritanism and hedonism (due to their tendency to place one part of the human composite over the other) fail to integrate “body and soul, spirituality and sexuality” thereby excluding the only way to heal man’s brokenness – treating man in his fullness. (West, 2014, n.p)

West states that St John Paul II recognised that the Catholic Church had also somehow contributed to the demonization of the body and sexuality. He therefore took it upon himself to make the faith more “human” while not changing any of the truth it had been entrusted with. He did this by giving subjectivity an important place in the Christian life through his phenomenology. As West notes “How often is the Church’s doctrine rejected because it is thought to be hopelessly removed from ‘real life’ experience?” (West, 2003, p. 42)

By first focusing on the “human experience” (West elucidates) the Pope was able to delve into a “traditionally neglected perspective” on the inner life of man. He discovered a harmony between man’s inner life and the world he lives in, “he discovers in the subjectivity of man’s inner world a unity with the objectivity of man’s outer world”. This unity shows that “objective truths” can be established without (as West posits) “objectivising abstractions”. Pope John Paul was firmly convinced that, on a fundamental level, “The Church’s message is in harmony with the most secret desires of the human heart”. (West, 2003, p. 40)

According to this outlook, the desire of man to engage in the sexual act is not wrong. It is good, “very good” in fact. So “good” that man does not know how “good” it really is. For the Pope these desires are embedded in our very nature ... yet our means to achieve the fulfilment of these desires cannot be chained to the natural world. They have to fulfil the supernatural dimension of man as well. Through the *Theology of the Body* John Paul shows that the Church’s teachings are for the good of man, that it holds the Truth so that man can become human in the fullest sense. The approach of *Theology of the Body* therefore is to (unlike the Puritans and Catholics who have accepted this Manicheism) acknowledge these desires and question why they are there and what their purpose is... This means that the Truth is not presented in a way that could be misconstrued as “Bible-bashing” but “On her part, the Church addresses people with full respect for their freedom.

Her mission does not restrict freedom but rather promotes it. The Church proposes; she imposes nothing". (Pope John Paul II, 1990, RM 39).

Since man is made in the Imago Dei – In the Image and Likeness of God – the Pope proposes man go “back to the beginning” before sin entered the picture. By returning to the two creation accounts in Genesis, the Pope reminds man that the seeds of who he is, his very purpose, has been planted in him from the start. He wants man to reclaim his identity, an identity that became tainted by original sin. The Pope calls us to an anamnesis, a process of recovering our memory but not in an attempt to return us to our original state (as this is impossible) but to use it as a blueprint that will guide us to the end vision of man which can only be achieved through Christ’s redemption. The Pope, by using the fact that man is stamped with “the Divine Image”, says to humanity that we no longer have to flail about lost in a sea of subjectivity and our own pride but we can start to “understand who we are (anthropology)” as well as “how we are to live (ethics)”. (West, 2003, p. 63)

For Pope John Paul (Christopher West posits) Genesis 1:27 or The Imago Dei gives man a transcendent dimension. He is composed of both body and soul. Man is not limited to the natural world; he is not reducible to mere matter but inherently possesses a spiritual dimension which gives him his dignity. This spiritual dimension sets him apart from the other creatures. A fact that is questioned considerably in the age of Veganism and the rapid development of AI but a fact that remains fundamental for the Pope nonetheless. Pope John Paul II in *Love & Responsibility* professed that, “Man must reconcile himself to his natural greatness ... he must not forget that he is a person”. (*A publication of the Love & Responsibility*, 2002, p. 1) Man actually obtains his subjectivity (the desire of every modernist), his “personhood” by virtue of the fact that he is created differently. He is adept to higher things. He is able to reason, develop himself and is not bound to basic instinct,

Being in the image of God the human individual possesses the dignity of a person, who is not just something, but someone. He is capable of self-knowledge, of self-possession and of freely giving himself and entering into communion with other persons. And he is called by grace to a covenant with his Creator, to offer him a response of faith and love that no other creature can give in his stead. (*Catechism of the Catholic Church* #357)

The Pope directs us to read Genesis further, to go even deeper into who man is, “God saw all that he had made, and it was very good.” (Genesis 1:31) Throughout the creation account every time God creates something

He exclaims that it is “good” but when he creates man he exclaims that it is “very good”. Not only do these words show that man is the pinnacle of God’s creation but the Pope draws attention to the metaphysical meaning of the word. The fact that God uses the word “good” after He brings something into existence means that, “being and good are convertible”. (West, 2003, p. 63) This means that all that has been created “is good in itself” and nothing created is intrinsically evil. This is why, as Christopher West further states, “Evil, by definition, is always and only the deprivation of what is good” (West, 2003, p. 63) Just by the mere fact that man exists – that he has being – means that he is very good. Although concupiscence, which refers to the fact that (as Northrop states), “we lost original innocence through the fall, which creates a situation in which it easier for us to sin and to desire to sin rather than always seek the good”. (Northrop, 2018, p. 5) does not displace the fact that goodness is in our bones.

While raising “man to his natural greatness” and while calling man to embrace his “goodness” Pope John Paul simultaneously reminds man of his responsibility. Man has a duty to orientate himself towards the ideals and not direct himself to the fulfilment of his own ego.

We cannot truly understand John Paul’s thought on being “made in the image of God” if we don’t engage with his understanding of the Trinity – an image of communion, “Let *us* make Man in *our* image and likeness...” (Genesis 1:26) The doctrine of the Trinity is so essential to Pope John Paul’s works he declared (as Christopher West cites) that the “Trinitarian concept of the ‘image of God’ ... constitutes, perhaps, the deepest theological aspect of all that can be said about man”. (West, 2003, p. 79) For the Pope this Trinitarian concept is, as Father Michael Gaitley MIC explains, an “eternal exchange of love, Father, Son and Holy Spirit”. This love involves a pouring out of self “for the good of the other” and results in something that is life-giving,

(For all eternity) (1) the Father pours himself out in a total gift of self-giving love to the Son and (2) the Son returns that gift with the same self-giving love – and the love between them is the Holy Spirit...amazingly, God “has destined us to share in that exchange”. (Gaitley, 2015, n.p.)

This is not a sentimental statement by any means but in fact calls man to enter into communion with his fellow man through making a “total gift of self”. (West, 2003, p. 346) Again man is set apart from the other creatures because only he can love in the fullest sense, only he has the full freedom to choose to love, “Only the human being can love, and only the person is able

to bring into this world another person capable of yet more love. It is this capacity of man to love – and to bring love into the world – that gives us our “natural” splendour”. (*A publication of...*, 2002, p. 1)

Man is basically made by Love, through Love and for Love, “Man is the only creature on earth which God willed for itself, [and he] cannot fully find himself except through a sincere gift of himself”. (*Gaudium et Spes* 24) This love is a verb however, calling man to voluntarily “lay down his life” thereby imaging the highest form of love; Christ on the Cross, “It is Christ himself who reveals to us our basic vocation as persons by giving himself to us in his death on the Cross”. (Northrop, 2018, p. 1) This love defines man’s very being and fulfils his greatest longings,

Man cannot live without love. He remains a being that is incomprehensible for himself, his life is senseless, if love is not revealed to him, if he does not encounter love, if he does not experience love and make it his own, if he does not participate intimately in it (From the encyclical, *Redemptor Hominis* – “Redeemer of Man”). (Northrop, 2018, p. 1, 11)

Love’s definition however has been watered down and distorted. As Mark Shea reminds us, “The Opposite of Love is not hate, according to Pope John Paul II. The opposite of love is use”. (Shea, 2011, n.p) This harkens back to John Paul’s personalistic norm which states that, “the person is the kind of good which does not admit of use and cannot be treated as an object of use and as such the means to an end.” (*A publication of the Love & Responsibility*, 2002, p. 4)

The model of Love we have been given is that of the Trinity “self-giving gift” which has actually been stamped in our bodies in the sexual difference and complementarity as male and female, “The human body includes right from the beginning ... the capacity of expressing love, that love in which the person becomes a gift – and by means of this gift – fulfils the meaning of his being and existence”. (St JP II, 1980)

The form Theology of the Body has taken in the US and its resulting success

After a bit of research I observed that (in comparison to Europe) the *Theology of the Body* is being taught in America in a very unique way. The Pope’s teachings have not been left to the realm of academia but they have been and continue to be brought down to the parish level. The pro-

pagators of the Pope's teachings have managed to take what is believed to be too difficult to read and make it not only understandable for the average layman but retain its life changing impact. In *Witness to Hope* George Weigel is very clear that the density of the Pope's work will prove a challenge and it must be simplified,

Few contemporary theologians have taken up the challenge implicit in this dramatic proposal. Fewer priests preach these themes. A very small, even microscopic, percentage of the world's Catholics even know that a "theology of the body" exists. Why? The density of John Paul's material is one factor; a secondary literature capable of "translating" John Paul's thought into more accessible categories and vocabulary is badly needed. (Weigel, 2005, p. 343)

Christopher West managed to do this impossible task with his *Theology of the Body Explained* which Weigel actually wrote the forward too. West's other publications also continue to make the Pope's teachings accessible to the laity i.e. *Theology of the Body Explained: A Commentary on John Paul II's Man and Woman He Created Them*, *Theology of the Body for Beginners*, *The Good News About Sex and Marriage etc.* As I have mentioned his dvd series *The Gift* has had a major impact on spreading the message. He is not alone in his endeavours however. Married couple Jason & Crystalina Evert have had tremendous success in making TOB accessible to teens. With their dvd series *TOB: for teens*, their numerous chastity talks, books (*How to find your Soulmate without losing your Soul*, *Pure Manhood and Pure Womanhood*) and through their webpage *Chastity Project.com* they have delivered John Paul's message to millions of teenagers.

The success of this evangelisation seems to lie in the fact that audiences can relate to the speakers as they are laity themselves. Although we must not forget that a celibate man formulated the *Theology of the Body* and it is definitely not only reserved for married people – the fact that ordinary people can testify to this teaching working in their lives is certainly a positive. The fact that the speakers can speak from "experience" reinforces the phenomenological approach intrinsic to the Pope's anthropology and fulfils the call of Vatican II which had a big impact on JP II's thought.

The teaching of *Theology of the Body* hasn't remained however in the form of a teaching on sexuality and marriage like that presented by Christopher West and Jason and Crystalina Evert but the phenomenological method and return to first principles and a proper understanding of the hu-

man person has been adopted by many other American Catholic Evangelists and Apologists; Dr Scott Hahn (former Protestant, Biblical scholar and author of multiple books), Bishop Barron (author and founder of *The Word on Fire*), Father Mike Schmitz (Ascension presents), Matt Fradd (speaker and author of *The Porn Myth*, presenter of *Pints with Aquinas*), Leah Darrow (former America's next top model and speaker on modesty and chastity) to name a few.

Beyond Borders

The explosion of the *Theology of the Body* has been so powerful that it has also extended well and truly beyond American borders. About seven years ago, 17586 km's away, a group of South Africans were exposed to the Pope's teachings through the dvd series that I mentioned before. These teachings had a life changing impact and resulted in the formation of *The Theology of The Body South Africa* and *The Foundation for the Person and the Family* which would go on to spread John Paul's teachings to different parts of South Africa. While culturally there were obviously uniquely South African issues/problems around marriage/sexuality the series was met with great enthusiasm, conversion and reversions by those who participated in the courses.

Conclusion

Perhaps the success of TOB in the States is due to Catholics being a minority in a predominantly Protestant country therefore people have had to make sure that they really believe what they profess. Perhaps the call to become "Gift" provides such a stark contrast to the radical individualism in the US that it has more impact – although TOB also fights for the subjectivity of the individual. Perhaps there is just more money in the US to enable speakers like West to travel around spreading the message full time, perhaps there is no Catholic fatigue like in Europe thereby enabling young Catholics to focus more on the teachings then being put off by an old white man telling them what to do with their sex lives.

These are all points to consider, yet we can equally point out a number of obstacles US Catholics have had to face e.g. the numerous persecution Catholics have been under by the media and sometimes the state (Obama care and the recent bill in California that would force priests to break the seal of confession).

In my opinion, the most fundamental reason that *Theology of the Body* has been so successful in the US is due to the fact that the American evangelisers have made a concerted effort to implement these teachings in their own lives. They have tried to live out the theology of their own bodies. Recognising the signs that God has implanted in them and drawing on their personal subjective experience to show that the desire they have for love is actually the desire they have for God. Through their own witness they are showing that the Church has always known what satisfies the deepest ache of the human heart even though it hasn't always adequately expressed it,

“We need a new 'language' to break the silence and reverse the negativity. We need a fresh theology that explains how the Christian sexual ethic-far from being the prudish list of prohibitions it's often assumed to be-corresponds perfectly with the deepest yearnings of our hearts for love and union”. (West, 2004, n.p)

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The Conception of Diversity in the EU

Koncepcja różnorodności w Unii Europejskiej

Abstract

The growing diversity of the European Union is seen as one of its core political and cultural characteristics. As a result, the idea of a common EU identity is based on the understanding of how different cultures, traditions and languages of Europe enrich its population and strengthen the Union. “United in Diversity” is the official motto of the EU. Despite the fact, that multilingualism is seen as an important component of the EU Language Policy, English is still (and likely will continue to be) very popular among the non-native speakers of the European Union. It is used as lingua franca that aids intercultural communication, mobility and various educational programs like Erasmus+.

Our analysis of the concept DIVERSITY and its verbalizers in the EU English-language academic and official discourse demonstrated that the most frequent collocates with “*diversity*” are formed with help of the attributes “*cultural*”, “*linguistic*” and “*gender*”. The results show the EU priority areas of the implementation of its “United in Diversity” policy.

Key words: *European Union, European Integration, DIVERSITY, language policy, lingua franca.*

Abstrakt

Wzrastająca różnorodność Unii Europejskiej jest postrzegana jako jedna z jej wartości politycznych i kulturowych. W konsekwencji idea wspólnej tożsamości UE opiera się na pojmowaniu tego, jak różne kultury, tradycje i języki Europy wzbogacają jej mieszkańców oraz jednoczą Unię. „Zjednoczona w różnorodności” – to oficjalna dewiza UE. Mimo że wielojęzyczność postrzegana jest jako istotny składnik polityki językowej UE, język angielski wciąż jest (i prawdopodobnie będzie nadal) bardzo popularny wśród obywateli Unii Europejskiej, dla których nie jest on językiem ojczystym. Język angielski działa jako lingua franca i sprzyja relacjom międzykulturowym, mobilności oraz wdrażaniu różnorodnych programów edukacyjnych, na kształt Erasmus+.

Nasza analiza konceptu DIVERSITY i jego werbalizatorów w angielskojęzycznym akademickim i oficjalnym unijnym dyskursie wskazuje, że najczęściej z „*diversity*” używane są przymiotniki „*cultural*”, „*linguistic*” oraz „*gender*”. Wyniki świadczą, że właśnie te kierunki są priorytetowymi w realizacji strategii UE „Zjednoczona w różnorodności”.

Słowa kluczowe: *Unia Europejska, integracja europejska, DIVERSITY, polityka językowa, lingua franca.*

Life in post-war Europe was defined by the idea of common citizenship, shared humanistic values and patriotism. Renowned political leaders like Winston Churchill or Charles de Gaulle supported a newborn concept of “the United European Family”. They saw it as a basis for peace, protection of human rights and freedom of speech. As Alberto Martinelli states, “in the post-war era, European identity was regarded as an antidote to the disastrous nationalisms that had caused the World War II catastrophe, a prerequisite for the continent’s moral and economic reconstruction and the most effective alternative to the resurgence of separate national identities and opposing nationalisms. It was believed that the stronger the sense of belonging to Europe, the more it weakened nationalist ideology”. (Martinelli, 2017, p. 20)

As the European Union developed, the need to shape and manage its growing diversity led to a new stage in the formation of its own identity. Signed in 1973 in Copenhagen, The Declaration of European Identity gave a start to a long and fruitful discussion on the essence of a new, supernational

European society and its core values. The Maastricht Treaty of 1992 defined European culture as the one based on respect for national and regional diversity. According to the Treaty, national cultures are seen as integral parts of the common identity and legacy of a united European culture.

This was the time, when thesis UNITY IN DIVERSITY first appeared in the EU media and political contexts. It summarized the strategy of the Union to occupy “an intermediate position between an almost national concept of European identity and a universalistic concept. Separate identities are constituent elements of common identity (which does not claim any priority over them) and of diversity, in the sense that none of the separate identities question the existence of the common identity”. (Martinelli, 2017, p. 22)

In 2000, the phrase “United in diversity” became the motto of the European Union. “It signifies how Europeans have come together, in the form of the EU, to work for peace and prosperity, while at the same time being enriched by the continent’s many different cultures, traditions and languages”. (*The EU...*, 2020) The motto was translated into all EU official languages and became one of the most important cultural messages in the modern European history.

The vision of unity achieved through diversity continues to be central to the EU integration strategy. However, common history is not enough. EU political leaders believe that a strong sense of belonging to Europe can be enhanced by people’s mobility and multilingualism. Sarah Ciaglia, Clemens Fuest and Friedrich Heinemann in their 2018 paper “What a Feeling?! How to Promote ‘European Identity’” for the EconPol Policy Report developed the idea of M. Bruter on the components of a diverse EU identity. (Bruter, 2004) It includes “cognitive mobilization (education, knowledge, information, interest and discussing politics frequently); transnational contact as a means to broaden the personal horizon and understanding for different cultures; the socio-economic background, and, finally, age”. (Ciaglia et al., 2018, p. 6) In a 2004 research on “The Role of Language Skills and Foreign Country Experiences in the Development of European Identity”, the authors find another important asset to engage in transnational contact – foreign language proficiency. (Fuss et al., 2004)

European Union Language Policy is focused on the idea of multilingualism. It is seen as a necessary pre-condition for smooth integration, intercultural communication and the development of the EU identity. The Official website of the European Union states: “The EU’s motto “united in diversity” symbolizes the essential contribution that linguistic diversity and language learning make to the European project. Languages unite people, render other countries and their cultures accessible, and strengthen intercultural understanding. Foreign language skills play a vital role in enhancing employability

and mobility. Multilingualism also improves the competitiveness of the EU economy". (*About...*, 2020)

The 2002 Barcelona Objective invited Member States to promote multilingualism and language competences, especially among the youth. Multilingualism is seen as the main building tool for multicultural dialogues, advanced educational and career possibilities and continuous European integration. The project ELDIA (European Linguistic Diversity for All), launched in 2010 and coordinated by the Johannes Gutenberg University combined linguistic, sociological, legal, and statistical experts from seven European countries into a consortium committed to investigate multilingualism and linguistic diversity.

One of the main findings in the ELDIA project was the fact that multilingualism itself is legally established only to a very limited extent. What is usually entrenched is a particular language, which can be used by a particular aggregate of people in a particular territorially defined region. (*The Development...*, 2012) Individual multilingualism is spread within minority areas or regions where languages are spoken locally, but it is not typical for larger social environments, created as a result of people's mobility and globalization.

European Commission Policy Review on the development of European identity describes the views of European multilingualism and linguistic diversity as largely characterized by a fatal dualism. "On the one hand, acquired multilingualism (learning and teaching of major vehicular languages such as English) is seen as an asset for the individual and a necessary educational investment for the society. From this viewpoint, becoming multilingual is a positive action, which can be supported and promoted. On the other hand, minority languages often have been seen, not in terms of "doing", but in terms of "being", as an integral part of belonging to an ethnic group. This implicitly "ethnifying" perspective, combined with sociopolitical issues of identity and (in)equality can lead to interpreting minority languages as a problem and a potential cause of inequality in society. In this perspective, minority languages are a burden both for the individual (who has to invest more effort in learning additional languages) and the society (in terms of extra investments, both in language teaching and in supporting minorities)". (*The Development...*, 2012, p. 23)

Another important finding is a result of the research project LINEE (Languages in a Network of European Excellence). It states that the English language does not threaten linguistic diversity of the European Union, quite the contrary. "English has emerged from the LINEE case studies as a neutral common language with only a marginal national connotation. It is

also perceived as a facilitator for further language learning, intercultural understanding and contact, and as an asset on the job market. Many non-native speakers of English perceive it as a facilitator for further language learning, intercultural understanding and contact". (*The Development...*, 2012, p. 19)

Our observation of the Erasmus students of The Lesya Ukrainka Eastern European National University supports the vision of English as a universal lingua franca. The students who travel to our partner-universities in Poland, Lithuania, Germany and Finland predominantly choose English as the language of their study. It also gives them access to diverse cultural environments and facilitates exchange. Academic mobility increases the motivation of our students for the English language learning. EU statistics proves that English is the most thought foreign language in Europe.

Modern linguists agree that non-native English of the EU is legitimate and authentic. A strong support of the language by the EU citizens, even after the Brexit, demonstrates the fact that English in the European Union is not a threat, but a guarantee of its UNITY IN DIVERSITY.

The above-mentioned analysis shows the importance of the concept DIVERSITY in the life of the European Union. Having analyzed more than 2000 pages of the EU documents available on the official EU web portal *europa.eu* we have extracted four main concepts EUROPE, UNION, EQUALITY, and DIVERSITY is among them. These concepts characterize modern academic English discourse of the European Union and are represented by the corresponding lexemes that have very high frequency among other EU related key words. The chart below shows the frequency of their use.

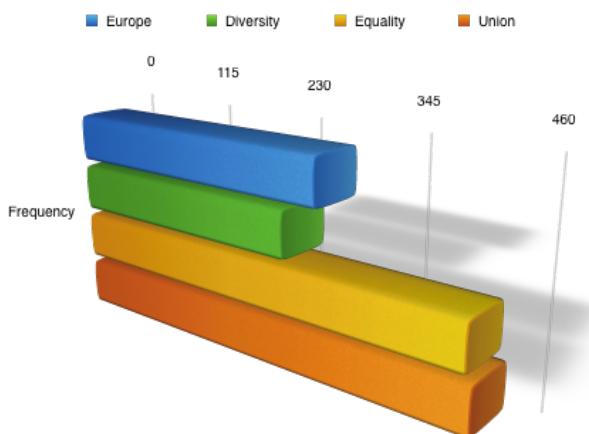


Chart 1: Frequency of use of the key concept verbalizers in the EU academic discourse

The concept DIVERSITY expressed by the corresponding verbalizer seems to be a unique one, since, alongside with its high frequency, it comprises a condensed meaning of variability, divergence, which can be inferred from its meanings taken from the Dante lexical database output:

Diversity:

1 n uncount [GOVT] [POL] [SOCIOLOGICAL] the fact that very different cultural, racial, ethnic, etc people/aspects co-exist within a group

STRUCTURE AJ_pert

COLLOCATE TYPE TYPE OR NATURE

COLLOCATES cultural, ethnic, linguistic, religious, social, racial.

STRUCTURE PP_X of

COLLOCATE TYPE FORMS OF RECOGNITION AND SUPPORT

COLLOCATES celebrate, increase, value, encourage.

2 n uncount [ECOLOGICAL] [BIOLOGICAL] [SCIENTIFIC] variety

COLLOCATE TYPE EXPRESSING SCALE (OCCASIONALLY HYPERBOLIC)

COLLOCATES rich, sheer, enormous, vast.

STRUCTURE AJ_pert

COLLOCATE TYPE EXPRESSING TYPE OR NATURE

COLLOCATES biological, genetic, ecological, geographical.

Dante search is based on frequency of collocates drawn directly from the text corpora. Thus, the first **COLLOCATE TYPE** “*TYPE OR NATURE*” **COLLOCATES** *cultural, ethnic, linguistic, religious, social, racial* and corresponds to the results of our EU official papers analysis and enables us to create the following structure of the concept DIVERSITY in modern academic EU discourse:

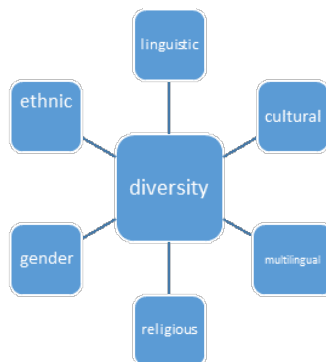


Chart 2: Structure of the concept DIVERSITY modern academic EU discourse

The most numerous group of collocates is the word combination “cultural diversity” which can easily be repeated in close context violating the well-established rules of avoiding repetition in academic writing, e.g.:

“...having regard to its resolution of 14 January 2004 on preserving and promoting cultural diversity: the role of the European regions and international organizations such as UNESCO and the Council of Europe, and to its resolution of 4 September 2003 on European regional and lesser-used languages – the languages of minorities in the EU – in the context of enlargement and cultural diversity”. (Eppink, 2007)

The results of statistical word search have demonstrated that the second numerous group of collocates with “*diversity*” is formed with help of an attribute “*linguistic*”.

“Thus the linguistic diversity and the presence of endangered languages within a country should be seen as an asset instead of burden, and so should be supported and promoted”. (Report..., 2020)

The harmonious co-existence of many languages in Europe embodies this. Languages can build bridges between people, giving us access to other countries and cultures, and enabling us to understand each other better. Thus, the two concepts “cultural diversity” and “linguistic diversity” commonly come along together in many contexts.

Below are represented the results of frequency corpus research of various spheres of use, where the above-mentioned collocations demonstrate the highest occurrence.

Table 1: DIVERSITY: frequency corpus research. (*EU...*, 2019)

Sphere of Use	Cultural Diversity	Linguistic Diversity	Gender Diversity	Ethnic Diversity	Multilingual Diversity	Religious Diversity
Business and Industry	586	78	20	22	9	25
Economy, Finance, and Investment	106	10	27	2	3	4
Environment, Food, Natural resources	463	20	24	7	18	12
EU in the world	3888	63	888	62	-	160

Functioning of the EU	3008	587	1157	241	158	270
Health, Wellbeing, Consumer Protection	240	45	43	23	11	17
Infrastructure, Research, and Innovation	20302	73	46	164	27	78
Life and Rights of the EU	135	28	70	31	1	43
Media, culture and languages in the EU	683	68	33	9	14	16
Others	856	112	189	301	277	119
Social	6	1	1	-	-	-
Work and Education	234	15348	115	304	439	29
Total	30505	16433	4425	1166	957	773

The above-mentioned corpus research demonstrates that the most frequently used collocation “cultural diversity” is predominantly used in the documents related to the sphere of Infrastructure, Research, and Innovation (20302). This signifies a special attention the EU pays to supporting and promoting cultural diversity in the newest spheres of human social activity. On May 20, the EU celebrates The World Day for Cultural Diversity for Dialogue and Development, which is marked by a great number of publications illustrating the use of the collocation “linguistic diversity”, e.g.:

The World Day for Cultural Diversity for Dialogue and Development is an occasion to promote culture and highlight the significance of its diversity as an agent of inclusion and positive change. (Celebrating..., 2020)

On the occasion of the World Day for Cultural Diversity for Dialogue and Development all EU institutions pay tribute to the very important role of cultural diversity in Europe and around the world for fostering dialogue, respect, and contributing to sustainable development and growth. By its central ideas, Europe provides common space for cultural diversity. All European communities, institutions, laws and legal proceedings are based on the exchanges of ideas, values, traditions and memories. Below, we present the list of the most frequent context for the collocation “cultural diversity” (and its variation “culture diversity”) according to the EU corpus search:

- celebrating *culture diversity* across the globe;
- the essential role of *cultural diversity* in Europe and around the world;

- Pilot project on the economy of *cultural diversity*;
- Portuguese Communication Award for *Cultural Diversity*;
- Measuring *cultural diversity* with the Stirling model.

The general tendency in the EU to understand culture as a source of sustainable growth and job creation is clearly seen in the EU's work to promote cultural diversity worldwide. 2018 was officially declared to be the European Year of Cultural Heritage. Throughout this year, the EU supported various projects to foster cultural exchanges worldwide, such as the Cultural Heritage Route in the Western Balkans and the pilot project of the European Houses of Culture. Common European initiatives were supported by the national cultural institutes from the 27 EU Member States. It helped to reinforce their fruitful cooperation through the specially created network for European Union National Institutes for Culture. This can easily explain the extensive growth in the number of uses of the collocation 'cultural diversity' in various contexts related to the sphere of innovations and social cooperation.

Further analysis of the contexts of the collocations "cultural diversity" has shown that two other remarkably numerous spheres of use are *EU in the World* (3888) and *Functioning of the EU* (3008). It is a common knowledge that the EU finances a number of projects across the world, including Creative Europe projects in countries from the EU's Eastern Neighborhood; the Ethical Fashion program employing craftsmen in textile productions in Western Africa; or an annual program in the Caribbean and Cuba that stimulates the creative industries and mobilizes cultural heritage notably through sustainable tourism. Thus, in this respect, it looks pretty reasonable that the collocation "cultural diversity" represents such a high frequency of use in the papers related to promoting the preservation of cultural heritage and the memory of the EU history showing a strong cooperation with the world's civil society organizations, economic and cultural institutions as part of the UNESCO 2005 Convention on the Protection and Promotion of the Diversity of Cultural Expressions.

In the "Joint Statement by High Representative/Vice-President Federica Mogherini and Commissioner for Education, Youth, Culture and Sport Tibor Navracsics on the World Day for Cultural Diversity for Dialogue and Development" (May 20, 2019) high European officials claim that "Europe's strength lies in its cultural diversity. This is why the EU together with its Member States and partners on the ground stays committed to support protection and promotion of cultural spaces and cultural exchanges as a powerful tool for dialogue and positive change locally, in Europe and worldwide". In

this quote the emphasis is made on a conceptual metaphor CULTURAL DIVERSITY IS STRENGTH which goes through the texts of the predominant majority of the EU's official papers. With this metaphor the EU entwines positive connotation into its main system of values treating cultural diversity as an instrument of power and unity. Given that national cultural institutes from the 27 EU Member States facilitate their cultural cooperation through the network of the EU official institutions, cultural diversity indeed serves as a tool for strengthening integration between the representatives of different nations and different cultures.

A close-up review of the spheres of use of the next collocation “linguistic diversity” shows the frequency of use, which is twice smaller than that of “cultural diversity”. The results of the context analysis for this collocation have shown an extensive number of concordances where “linguistic diversity” is used in combination with “promote language learning”, which altogether creates a specific structural and semantic entity working as a language pattern in many EU's official documents. Not only does it form a linguistic cluster, but also shapes the style of thinking of the citizens of the Member States treating these two concepts – “linguistic diversity” and “language learning” as one.

The European Commission has a long-standing commitment to promoting language learning and linguistic diversity. The first comprehensive program promoting language teaching and learning, *Lingua*, came into force in 1989 and since then languages have been at the heart of European programs in the field of education and training.

In the annual report “Linguistic diversity: the heart of Europe's DNA” Androulla Vassiliou, Member of the European Commission for Education, Culture, Multilingualism and Youth (Brussels, 24 June 2014) uses a very demonstrative metaphor. Linguistic diversity is the heart of Europe's DNA, which indicates that the EU thrives on its multilingualism and languages are at the core of its functioning. Linguistic diversity and the ability to speak many languages are essential for the success of the EU democratic project. Indeed, corpus search demonstrates that 93% (Table 1) of the uses of 'linguistic diversity' belong to the sphere of Work and Education. Multilingualism is a key area where Europe can get closer to citizens' needs. Thus, the following three strategic areas present the biggest interest for the European Union in the sphere of linguistic diversity: lifelong language learning, better language teaching, building a language-friendly environment. So, we may conclude that the collocation 'promote language learning and linguistic diversity' functions as a ready-made verbalizer to utter one of the key concepts

of the EU's communication strategy – to support multilingual communication and give rise to new language-teaching initiatives.

As for the collocation gender diversity, the highest frequency of use is demonstrated in the sphere Functioning of the EU (1157). This word combination is commonly used in various Press Releases to set up the official position of the EU concerning the gender issues, e.g.:

Together, the Commission and the ECB will indeed master Europe's challenges. This will be true for both financial stability and the challenging area of gender diversity.

For me all these studies and facts make it crystal clear: women mean business and profit. But there is also a clear macroeconomic argument for more gender diversity on boards. The glass ceiling that keeps women out of decision-making roles.

July 18, 2018 – the Commission held a public consultation inviting the public – individual businesses, social partners, interested NGOs and citizens – to comment on what kind of measures the EU should take to tackle the lack of gender diversity in boardrooms. (Gender..., 2020)

The distributional contexts of the collocation – *the challenging area of gender diversity, macroeconomic argument for more gender diversity, to tackle the lack of gender diversity* – suggest that it is still a challenging issue for Europe in general and the EU in particular. All the contexts represent public tension that is normally associated with gender diversity and requires special attention from the EU policy makers.

It should be noted that the collocation gender diversity has become the central concept of many projects funded by the European Commission, this it is very often used in project descriptions, especially in the contextual environment with LGBT abbreviation, e.g.:

Herein, gender and gender diversity are presented as main focus throughout the whole project.

Welfare aspects including possible medical, mental, psychological, and psychiatric aspects of gender diversity and sexual orientation. (Transition..., 2020)

An interesting observation with regard of the use of the collocation “*gender diversity*” in the EU official discourse is concerned with the fact that regardless of its relatively high general frequency in the texts of the EU official documents, it is not widely represented in social media, forums, public

internet platforms. Thus, it was used only once in Twitter (twitter.com) on the official account of the World Economic Forum (March 4, 2018), e.g.:

How gender diversity enhances society. (World..., 2018)

However, this tweet did not receive public appreciation; it was liked only 89 times, and re-tweeted 74 times, which indicated low level of public interest and motivation to encourage discussion on gender diversity.

The European Union as a socio-political phenomenon has brought a new meaning to the understanding of cognitive and communicative functions of language in general, and functioning of the English language (its academic variant) in particular. Recently we have been witnessing the formation and linguistic specification of some new cultural and linguistic concepts, which exemplify specific stages in the political, economic, and cultural development of the EU.

The concept DIVERSITY comprises a condensed meaning of variability, divergence and is extremely frequent in the modern EU English-language discourse. The results of statistical word search have demonstrated that the first numerous group of collocates with “*diversity*” is formed with help of an attribute “*cultural*”, the second numerous group of collocates is formed with help of an attribute “*linguistic*” and the third – with attribute “*gender*”. These results demonstrate the EU priorities in the development of its policy on DIVERSITY.

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Polityka – Politics



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**Autonomia Karelii w okresie międzywojennym
jako przykład realizacji sowieckiej polityki narodowościowej
i międzynarodowej**

**The Autonomy of Karelia in the Pre-War Period
as an Example the Soviet International and Ethnic Policy**

Abstrakt

Artykuł ukazuje meandry polityki bolszewickiej wobec Karelii, regionu na pograniczu radziecko-fińskim: od Karelskiej Komuny Pracy, przez Karelską Autonomiczną Socjalistyczną Republikę Radziecką do Karelskiej Socjalistycznej Republiki Radzieckiej. Proces ten ukazany został na tle ówczesnej polityki sowieckiego centrum wobec małych narodów północno-zachodniej części Rosji. Działania Moskwy doprowadziły do rusyfikacji miejscowej ludności ugrofińskiej oraz do gospodarczej dewastacji republiki.

Słowa kluczowe: *Karelia, autonomia, polityka narodowościowa, Związek Radziecki.*

Abstract

The article shows the meanders of Bolshevik policy towards Karelia, a region on the Soviet-Finnish border: from the Karelian Worker's Commune, through the Karelian Autonomous Soviet Socialist Republic to the Karelian Soviet Socialist Republic. This process was shown against the background of the then Soviet Center's policy towards small nations in northwestern Russia. Moscow's actions

resulted in the Russification of the local Finno-Ugric people, and to the economic devastation of the Republic.

Key words: *Karelia, autonomy, nationality policy, Soviet Union.*

Bolszewicy dobrze rozumieli wagę kwestii narodowych dla możliwości zrealizowania swojego ostatecznego zamierzenia, jakim było stworzenie z byłego imperium przyczółka do rozpoczęcia wszechświatowej rewolucji komunistycznej. Przedstawianie przez nich Rosji jako „więzienia narodów” było jednym z tych działań, które odegrały ogromną rolę w nadaniu dynamiki wydarzeniom wiodącym wprost do dekompozycji caratu i do wygrania walki o władzę zarówno z siłami monarchistycznymi, jak i z ośrodkami republikańskimi. Sformułowaniem tym posługiwał się Włodzimierz Lenin jeszcze przed I wojną światową. Użył go m.in. w przemówieniu, wygłoszonym podczas sesji IV Dumy Państwowej 20 maja 1913 roku (st. st.) przez stojącego na czele frakcji bolszewików Grigorija I. Pietrowskiego, co wywołało wówczas ogromny rezonans. Po 1917 roku określenie to stało się częścią oficjalnego języka bolszewickiej propagandy. (ЛЕНИН, 1924, s. 227-233)

Uwolnienie wielkiego potencjału tkwiącego w dążeniach zniewolonych narodów do wolności było więc zabiegiem, który służył celom bolszewickim na określonym etapie ich działań, a nie stanowił celu samego w sobie. Utylitaryzm kwestii narodowych w drodze rosyjskich marksistów do realizacji swego programu przejawiał się w ich próbach pogodzenia hasła o samostanowieniu narodów i prawie do posiadania przez nie własnej suwerenności z dążeniami do restytucji imperium w dawnych granicach w sytuacji, gdy stało się pewnym, iż idea światowej rewolucji komunistycznej poniosła klęskę i teoretyczna władza „mas pracujących” ograniczy się do jednego państwa – Związku Radzieckiego. Podkreślił to słusznie Ronald Grigor Suny, pisząc, że „przed rewolucyjną Rosją w 1917 roku stał wybór: uchronić imperium lub stworzyć nowe, demokratyczne państwo, w którym pozwolono by tym narodom, które podjęły decyzję o swym odłączeniu, na uczynienie tego. [...] I liberałowie, i nacjonaści wierzyli w narodowe samostanowienie na poziomie teorii politycznej, jednakże, gdy narody nierosyjskie wybrały odłączenie, interesy państwa wzięły górę nad zasadami”. (Сунь, 2014, s. 622)

Dążąc do wyjaśnienia, dlaczego zasadnicze założenia zawarte w głównym przesłaniu Karola Marksa o wybuchu rewolucji w państwach z rozwiniętą klasą robotniczą i o jej globalnym zasięgu nie zostały zrealizowane, bolsze-

wicy dokonali semantycznego zabiegu, tworząc własną egzegezę marksizmu pod nową postacią tzw. leninizmu.

Oparcie się na dotychczasowym dorobku Włodzimierza Uljanowa oraz jego aktywność jako politycznego przywódcy, a jednocześnie głównego ideologa bolszewików po obaleniu Rządu Tymczasowego i rozpoczęciu wojny domowej, dawało sposobność do niczym nieograniczonego manewrowania hasłami i programami, których celem było osiągnięcie pożądaných zachowań poddanego takiej światopoglądowej perswazji społeczeństwa. Jednocześnie bolszewicy zdawali sobie sprawę z zachodzącej sprzeczności między modelem państwa, opartym o ponadnarodową strukturę klasową z istnieniem narodów jako takich, a przede wszystkim z ich dążeniem do manifestowania własnego bytu i eksponowania związanych z tym aspiracji i oczekiwań. Wyrazem tej dychotomii był artykuł pierwszy Konstytucji Rosyjskiej Socjalistycznej Federacyjnej Republiki Radzieckiej, uchwalonej 10 lipca 1918 roku, składający się z dwóch punktów: 1) „Rosja zostaje proklamowana jako Republika Rad Delegatów Robotniczych, Chłopskich i Żołnierskich. Cała władza w centrum i w terenie należy do tych Rad. 2) Rosyjska Republika Radziecka została utworzona na podstawie związku wolnych narodów, jako federacja Radzieckich republik narodowych”. (*Конституция (основной закон)*... s. 423)

Ta sprzeczność między klasowością społeczeństwa a jego strukturą etniczną oraz miejscem Rosjan w sowieckim państwie cechowała całość dziejów Związku Radzieckiego aż do jego upadku w 1991 roku. Charakterystyczne były tu zmiany proporcji między poszczególnymi elementami tej strukturalnej układanki w zależności od potrzeb i preferencji aktualnego kierownictwa: od polityki tzw. „коренизации” i aktywnego popierania dążeń narodowych nawet małych społeczności etnicznych, poprzez rosyjski czy wręcz wielkoruski nacjonalizm aż do koncepcji narodu radzieckiego. (Миронов, 2017, s. 165) Jednakże – z punktu widzenia rządzącego centrum – wszystkie te meandry ideologiczne i oparte o nie rozwiązania praktyczne znajdowały swe uzasadnienie w nadrzędnej wartości, jaką było tak zapewnienie ładu wewnętrznego, jak i oddziaływanie na zewnątrz (np. rozszerzanie swoich wpływów pod pozorem walki z kolonializmem lub społecznym uciskiem).

Jednym z przykładów takiego ambiwalentnego podejścia do kwestii narodowej była realizacja sowieckiej polityki wobec Karelii, ojczyzny ugrofińskiego narodu zamieszkującego od wieków obszary między Morzami Bałtyckim i Białym. Z racji na strategiczną wagę tego terenu, a także etniczno-kulturowe powiązania między Karelami i Finami, obszar ten był z punktu widzenia bolszewickiego centrum istotnym polem do eksperymentowania na polu przyszłych rozwiązań klasowo-narodowościowych.

W wyniku rozwoju terytorialnego Rosji na jej terenie znalazło się szereg ludów ugrofińskich, zamieszkujących Rosja carska była państwem, w którym zamieszkiwało szereg narodów ugrofińskich: od Finów, Karelów, Estów, Ingrów, Wepsów i Wotów na północnym-zachodzie, przez Maryjczyków i Mordwinów nad górną Wołgą po Komi-Zyrian, Komi-Permiaków i Udmurtyjczyków nad Peczorą i Chantów i Mansów nad Obem. (Логинава, Реброва, 2013, s. 92-95) Reprezentowali oni różne stadia rozwoju społecznego i kulturowego. Finowie posiadali szeroką autonomię w ramach Wielkiego Księstwa Finlandzkiego, Estowie funkcjonowali z kolei w ramach umownej konstrukcji prawn-administracyjnej, jaką cieszyły się gubernie nadbałtyckie, gdzie swe najsilniejsze piętno odcisnęli tzw. „остзейцы”, czyli Niemcy bałtyccy. Reszta tych etnosów objęta była zwykłymi strukturami gubernialnymi oraz polityką, jaką przyjmowały władze centralne wobec, jak ich określano, „инородцев”.

Po obaleniu caratu ówczesna opinia publiczna dopuszczała możliwość ukonstytuowania się jakiejś formy własnej reprezentacji narodowej Finów (oraz Polaków), ale w ramach ich związku z demokratyczną Rosją. (Булдаков, 1997, s. 142-143) Jednakże Finlandia proklamowała swą niepodległość 6 grudnia 1917 roku, początkowo jako monarchia, a później republika. W obliczu niekorzystnych dla siebie wydarzeń bolszewicy, formalnie uznając ten akt, faktycznie postawili na rozwiązanie siłowe, doprowadzając do wybuchu komunistycznego powstania i proklamowania krótkotrwałej fasadowej Fińskiej Socjalistycznej Republiki Robotniczej (styczeń-kwiecień 1918). (Сюкиянен, 1962, s. 21-35)

Nieudana próba rozciągnięcia swojej nieformalnej zwierzchności na Finlandię postawiła przed Moskwą problem organizacji pogranicza z tym państwem. Istotny był tu zwłaszcza aspekt militarny. Aczkolwiek dla sowieckiej Rosji głównym kierunkiem działania w latach 1919-1920 był zachód Europy, niemniej jednak stratedzy wojskowi doceniali wagę terytorium fińskiego jako ewentualnego obszaru dogodnego do wyprowadzenia uderzenia i na Piotrogród, i na Murmańsk. Także patriotycznie nastrojone środowiska fińskie nie rezygnowały z Karelii, traktowanej przez nie jako istotny element tożsamości narodowej i integralną część wspólnej przestrzeni kulturowej. Sami zaś Karelowie dalecy byli od uznania władzy radzieckiej, z racji na jej brutalny i eksploatacyjny (komunizm wojenny) charakter. Starcia zbrojne grup napływających z Finlandii oraz lokalne powstania miejscowej ludności umiędzynarodowiły problem karelski. Zawarty 14 października 1920 roku w estońskim Tartu pokój między Rosją a Finlandią m.in. wyznaczał wspólną

granicę oraz zawierał obietnicę szerokiej autonomii dla Karelów. (Browning, Joenniemi, 2014, s. 7-11; Вихавайнен, 2015, s. 238-242)

Dla strony sowieckiej nadanie jakiejś formy samorządności terytorialnej ugrofińskiej ludności rosyjsko-fińskiego pogranicza było środkiem do rozwiązania kilku narosłych w międzyczasie problemów. Przede wszystkim rozwiązałyby to w jakiejś mierze problem roszczeń fińskich (formułowanych w czasie trwających rozmów pokojowych) i stanowiło kolejny krok do uznania Rosji na arenie międzynarodowej. Zagospodarowano by też przy tej okazji sporą rzeszę fińskich „czerwonych” emigrantów, którzy szeroką strugą napłynęli do swej nowej bolszewickiej ojczyzny (ogółem do końca lat 20. XX wieku było to około 10-12 tys. osób). Przede wszystkim zaś jednak zapewniono by właściwe wykorzystanie ogromnego bogactwa tej krainy, jakim były lasy, a także zapewniono by bezpieczeństwo ważnej linii komunikacyjnej, jaką była kolej murmańska. (Kangaspuro, 2007, s. 1-3; Такала, 2015, s. 277-278)

Do takiego rozwiązania dążył przede wszystkim znany działacz lewicowy, ostatni komisarz ludowy Fińskiej SRR, Edvard Gylling. Korzystając z pośrednictwa przywódcy Komunistycznej Partii Finlandii Yrjö Siroli, przekonał on Lenina i ludowego komisarza spraw zagranicznych Gieorgija Cziczerina do swej koncepcji, odwołując się do obu zasad, stanowiących teoretyczną istotę państwa sowieckiego: idei władzy rad oraz samostanowienia narodów. Przede wszystkim jednak do obu decydentów przemówił praktyczny wymiar nowej jednostki administracyjnej, rozumianej jako punkt wyjścia do dalszych działań na rzecz uzależnienia i inkorporacji nie tylko Finlandii, ale i całej Skandynawii. W dniu 6 czerwca 1920 roku Wszechrosyjski Centralny Komitet Wykonawczy ogłosił dekret (podpisany przez jej przewodniczącego Michaiła Kalinina) o powołaniu Karelskiej Komuny Pracy w następującym brzmieniu: „W celu walki o społeczne wyzwolenie pracujących Karelii Wszechrosyjski Centralny Komitet Wykonawczy postanawia: 1) utworzyć w zamieszkałych przez Karelów miejscowościach guberni ołonieckiej i archangielskiej, zgodnie z artykułem 11. Konstytucji RSFRR [...] obwodowe zjednoczenie – Karelską Komunę Pracy; 2) zalecić karelskiemu komitetowi niezwłoczne przystąpienie do przygotowania zwołania zjazdu Rady Karelskiej Komuny Pracy, który określi organizację organów władzy w Karelskiej Komunie Pracy. [...]”. (*Декрет Всесоюзийского...* s. 173)

Inicjatywa „czerwonych” Finów była sabotowana przez działających na obszarze przyszłej Komuny działaczy pochodzenia rosyjskiego. Podważali oni zasadność kryterium etnicznego, argumentując, że ziemie zamieszkałe przez ludność ugrofińską (Finowie, Karelowie i Samowie) stanowią jej niewielką część, zawartą między granicą a linią kolei murmańskiej. Zgodnie

z takim stanem rzeczy stolicą nowo powołanej jednostki winno zostać jedno z dwóch miast: Kiem (nad Morzem Białym) lub też Miedwieżiegorsk (nad Jeziorem Onega). Z kolei przywódca fińskich emigrantów Gylling uważał, że w granicach Komuny powinny znaleźć się tereny o pewnym już stopniu rozwoju gospodarczego, nawet jeśli miałyby tam przeważać ludność rosyjskojęzyczna, ponieważ dałoby to podstawy do jej samodzielnej egzystencji. Ostatecznie wypracowano kompromis i stolicą Komuny stał się położony nad jeziorem Onega Pietrozawodsk, gdzie istniały już zaczątki przemysłu i proletariatu fabrycznego, a jej granice poprowadzono w szerszym wariantcie, obejmując nimi tereny o powierzchni około 115 tysięcy km² między jeziorami Onega i Ładoga oraz Morzem Białym a Finlandią (zasadniczo były to trzy powiaty: kemski, ołoniecki i pietrozawodski). (Тобенко, 2016, s. 69-71) W początkowym okresie istnienia karelskiej autonomii wydawało się, że istotnie stanie się ona zaczątkiem przyszłej sowieckiej Finlandii, bowiem jej struktury władzy oraz znaczące stanowiska w gospodarce i szkolnictwie zostały w sporej części obsadzone przez „czerwonych” Finów. (Kangaspuro, 2007, s. 17-20) Według danych z początku 1923 roku Karelską Komunę Pracy zamieszkiwało ogółem 207 tysięcy osób, z czego 115 tysięcy stanowili Rosjanie, 86 tysięcy Karelowie i 2 tysiące Finowie. Jednakże, jeśli chodzi o przynależność partyjną, to na jednego Rosjanina – członka WKP(b) – przypadało 162 współrodaków, Karela – aż 491, a Fina – tylko 10. Większość z fińskich emigrantów miała wykształcenie na poziomie podstawowym i średnim, sporo z nich ukończyło studia, a Edvard Gylling był doktorem filozofii. Ponadto elita tej narodowości posiadała ogromne doświadczenie w działalności politycznej, znała języki obce i miała zdecydowanie lepsze obycie międzynarodowe. Były to czynniki stanowiące początkowo o sukcesie „finizacji” sowieckiej Karelii, ale też, wraz ze zmianą politycznego kursu moskiewskiego centrum, prowadziły do jej upadku w dobie czystek z końca lat 30. XX wieku. (Бутвило, 2010, s. 44-49; Маркова, 2019, s. 279-281)

Karelska Komuna była przede wszystkim źródłem drewna i materiałów drewnopochodnych, których znaczną część eksportowano za granicę (w 1921 r. było to 800 tys. rubli złotem). Na dogodnych dla rolnictwa obszarach położonych w jej południowej części rozwijano uprawy zbóż. Nadwyżki kierowane były do regionów, które we wczesnych latach 20. zmagaly się z klęską głodu (przede wszystkim Powołże). Dobre administrowanie i właściwa organizacja pracy, a także wyraźnie zmniejszenie napięcia na pograniczu z Finlandią przyniosły pozytywny dla Komuny efekt w postaci jej wyraźnie lepszego stanu gospodarczego w porównaniu z resztą północno-zachodnich guberni Rosji. Dlatego też władze centralne dwukrotnie rozszerzyły jej gra-

nice: 18 września 1922 roku, po zlikwidowaniu guberni ołonieckiej, włączono do niej powiat powieniecki i część powiatu pudoskiego, a 30 kwietnia 1923 roku rozszerzono ją o pięć gmin z powiatu oneskiego guberni archangielskiej. (Машезерский, 1948, s. 32-40)

Zmiany te były w pełni zamierzone (choć były efektem zaciętej dyskusji w gronie bolszewickich decydentów, skutkiem której w granice karelskiej autonomii nie włączono Półwyspu Kolskiego) i prowadziły do rychłego podwyższenia statusu administracyjnego Komuny. Została ona decyzją Wszechrosyjskiego Centralnego Komitetu Wykonawczego z 25 lipca 1923 roku przekształcona w Karelską Autonomiczną Socjalistyczną Republikę Radziecką. (Килин, 1999, s. 82-87) Początkowo nowa republika cieszyła się rzeczywistością, jak na warunki sowieckie, autonomią gospodarczą i finansową, pozwalającą na podjęcie szeregu inwestycji jej w infrastrukturę przemysłową (m.in. fabryki celulozy, zakłady chemiczne i metalurgiczne) i użytkową (drogi, szkoły i budynki użyteczności publicznej). Karelska ASRR miała stać się bowiem swoistą wizytówką dla ludności po fińskiej stronie granicy, co wpisywało się w ówczesną ogólną politykę władz centralnych. Stan względnej samodzielności trwał do początku lat 30., kiedy to w całym Związku Radzieckim zaostrzono politykę podatkową i praktycznie zlikwidowano resztki niezależności ekonomicznej jej terenowych podmiotów oraz poddano je centralnemu zarządzaniu. Decyzja ta odbiła się i na sytuacji Karelskiej ASRR, w której najpierw znacznie osłabiło tempo jej rozwoju, a później popadła ona w stan gospodarczej stagnacji. (Барон, 2011, s. 98-100; Килин, 2012, s. 62-74)

Największym problemem republiki w latach 20. i 30. XX wieku był deficyt zasobów ludzkich. Początkowo dla zwiększenia jego potencjału władze stosowały dobrowolny mechanizm rekrutacji robotników przemysłowych i leśnych. Wyższy, jak już wcześniej wspomniano, poziom gospodarczy zachęcał do wewnętrznych przesiedleń i stałego osiedlenia, z czego korzystały tysiące obywateli ZSRR. Jednocześnie radzieckie przedstawicielstwa, zwłaszcza w Stanach Zjednoczonych i w Kanadzie, rekrutowały tysiące drwali fińskiego pochodzenia do pracy przy pozyskiwaniu i obróbce drewna. Z radzieckiej oferty skorzystały całe rodziny, które traktowały Związek Radziecki jako swoją przybraną ojczyznę, z entuzjazmem włączając się w dzieło budowania systemu sprawiedliwości społecznej w Karelii (i w wielu innych miejscach ZSRR). (Lam, 2010, s. 204-222; Autio-Sarasma, 2011, 86-99)

Wspomniany wcześniej kryzys ekonomiczny doprowadził do odpływu siły roboczej z Karelskiej ASRR, na którą nakładano coraz to nowe obciążenia wynikające z zarządzeń gospodarczego centrum. (Филимончик, 2008, s. 27-34) W związku z tą sytuacją miejscowe władze zwróciły się do Zjed-

noczonego Państwowego Zarządu Politycznego (ОГПУ), w gestii którego znajdowały się obozy pracy przymusowej, o zwiększenie ich ilości na obszarze republiki. Obozy takie co prawda istniały już od 1923 roku (w zależności od Sołowieckiego Obozu Specjalnego Przeznaczenia), ale ich liczbę zwiększono w związku z budową kanału łączącego Morze Bałtyckie z Morzem Białym (Беломорско-Балтийский канал). Już w 1932 roku na terenie Karelii pracowało około 100 tysięcy więźniów, i wielkość ta utrzymała się aż do wybuchu wojny z Niemcami. (Baron, 2001, s. 621-645; Joyce, 2003, s. 163-187)

W związku z ogólnoradzieckimi tendencjami do odejścia od polityki samostanowienia narodów oraz zwrotu w kierunku rosyjskiego nacjonalizmu w połowie lat 30. w Karelskiej ASRR doszło do zasadniczych zmian w strategii jej dalszego rozwoju i ewentualnego zagranicznego oddziaływania. Doszło tam do czystki wśród rządzących nią „czerwonych” Finów a także do masowych wysiedleń jej autochtonicznych ugrofińskich mieszkańców. Symbolem zmian było zwolnienie w październiku 1935 roku ze stanowiska przewodniczącego Rady Komisarzy Ludowych Karelskiej ASRR Edvarda Gyllinga (po zwolnieniu pracował w moskiewskim Międzynarodowym Instytucie Ekonomicznym; aresztowany 17 lipca 1937 roku, po kilkumiesięcznym śledztwie i procesie został rozstrzelany 14 czerwca 1938 roku). Wraz z nim usunięto ze stanowiska, a później aresztowano i rozstrzelano pierwszego sekretarza Karelskiego Komitetu Obwodowego WKP(b) i jednocześnie jego bliskiego współpracownika Gustawa (Kustaa) Rovio. (Килян, 2012, s. 83-95; Такала, 2019, s. 225-246)

W latach 30. XX wieku Karelia była polem do realizacji wszystkich ówczesnych działań stalinowskiej polityki wewnętrznej. Poddana została przymusowej kolektywizacji rolnictwa, forsownej industrializacji i nasilającym się czystkom etnicznym, prowadzącym do zasadniczych zmian w jej strukturze narodowej na korzyść elementu wielkoruskiego. Dokonano w tym okresie także praktycznej definizacji regionu, usuwając wszelkie ślady fińskiej kultury łącznie ze zmianą języka urzędowego, którym w miejsce fińskiego został karelski, zapisywany cyrylicą. Ten niewyobrażalny terror miał w tej części ZSRR swój dodatkowy wymiar, związany z jej pogranicznym charakterem. Rzekome zagrożenie (biorąc pod uwagę ogromną różnicę potencjałów), jakie miało płynąć z Finlandii nie tylko dla Karelskiej ASRR, ale i dla całego Związku Radzieckiego, stało się czynnikiem wyzwalającym nadzwyczajną, nawet jak na ten okres, brutalność sowieckiego aparatu represji w odniesieniu do miejscowej ludności. Przyjmuje się, że w latach 1937-1938 w sowieckiej Karelii osądzono około 13 tysięcy osób, z czego ponad 11 tysięcy zostało skazanych na karę śmierci. (Деннингхаус, 2007, s. 204-206; Такала, 2016, s. 132-155; Такала, 2018, s. 144-204)

Karelska ASRR do końca lat 30. została całkowicie spacyfikowana. Jej autonomia stała się fikcją, w obu zresztą wymiarach – klasowym (sowietyzacja) i narodowym (rusyfikacja). Inteligencja techniczna oraz kulturalna praktycznie przestała istnieć, chłopstwo zostało zamienione w przypisanych do ziemi kołchoźników, a robotnicy z gospodarzy swych zakładów pracy stali się pozbawionymi elementarnych praw wyrobnikami. Nie było zatem żadnym paradoksem to, że jedyną w miarę zwartą i skuteczną gospodarczo grupą byli więźniowie przymusowych obozów pracy. Miejscowa ludność bądź została wysiedlona, bądź poddana forsownej rusyfikacji. Migracje wewnątrzradzieckie zmieniły przy tym w sposób znaczący strukturę narodowościową Karelii, w której ludy ugrofińskie stały się niewiele znaczącą, kilkunastoprocentową mniejszością. Związki z Finlandią, podtrzymywane do niedawna nawet w sposób nielegalny, z racji na stosowaną przemoc przez aparat represji właściwie zanikły, a przyznawanie się do fińskości czy nadmierne manifestowanie karelskości nie tylko stygmatyzowało daną osobę bądź grupę, ale częstokroć prowadziło do zesłania lub śmierci. Dodatkowo region ten, w zamierzeniach czynników wojskowych, stać się miał obszarem, z którego wyjść miało planowane uderzenie na Finlandię. Kierowane do Karelii inwestycje o charakterze militarnym, a także obecność dużych zgrupowań wojska nie wpływały na rozwój jej ekonomiki, a raczej stawały się kolejnym obciążeniem. Wojna zimowa i wynikię w jej rezultacie przemiany na pograniczu radziecko-fińskim, powiązane z klęską Finlandii i zawartym przez nią pokojem ze Związkiem Radzieckim (12-13 marca 1940), doprowadziły do kolejnej zmiany w statusie tego obszaru: 31 marca 1940 roku Rada Najwyższa ZSRR uchwaliła dekret o przekształceniu Karelskiej ASRR w Karelo-Fińską Socjalistyczną Republikę Radziecką. To posunięcie nie miało żadnego związku z jakimkolwiek działaniem na rzecz miejscowej ludności, zwłaszcza ugrofińskiej, ale wręcz przeciwnie, stanowiło element szerszej strategii stalinowskiego ZSRR wobec Finlandii i reszty państw skandynawskich, mającej na celu ich ubezwłasnowolnienie, uzależnienie i ewentualne wchłonięcie. W niemal ćwierćwiecze po utworzeniu Karelskiej Komuny Pracy okazało się, że jej autonomia stała się już tylko odległym wspomnieniem.

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Aspect of Populism: Irrational, Rational Technological Measures

Przejawy populizmu: postawy irracjonalne, racjonalno-technokratyczne

Abstract

The article focuses on the notion of populism analyzed from the point of view of political science and history due to the absence of a universally accepted and often unambiguous interpretation. The thesis concentrates on the complexity of the definition and manifestations of populism. It also offers reflections on populism as perceived by some scholars who have researched this sphere. An integral part of the scientific debate, which has been going on for several decades, presents the standpoint that the category of “populism” as a tool of political analysis, should be abandoned. However, considerable achievements of populism researchers provide a solid foundation for its active penetration by experts in political science.

Populism is mostly vivid at lower social and political class levels characteristic of underdeveloped political and legal culture as well as democracy. The inability of people to distinguish realistic proposals from demagoguery combined with their low political culture, is actively used by populist leaders to mobilize the masses for political support.

The article underlines the author's analysis of populism viewed through the prism of irrational, rational, and technological dimension.

Key words: *populism, political science, ideology, political leader, charisma, political system, political regime, political movement, political party, transformational processes, post-communism.*

Abstrakt

W tekście autorka skupia się na pojęciu populizmu czyniąc to z perspektywy politologii, historii, zdając sobie przy tym sprawę z braku jednoznacznej i powszechnie akceptowalnej definicji poruszanego zagadnienia. Hipoteza o złożoności definicji i ogromnej różnorodności przejawów populizmu u większości autorów zajmujących się populizmem zawsze staje na początku ich refleksji o zjawisku. Nieodłączną częścią debaty naukowej, która toczy się już od kilku dziesięcioleci, jest twierdzenie, że pojęcie „populizmu” jako narzędzie analizy politycznej należy całkowicie porzucić. Tym niemniej, znaczące osiągnięcia badaczy populizmu przyczyniły się do tego, że opracowania dookoła poruszanego pojęcia stanowią źródło do którego dość często sięgają nauki polityczne.

Populizm występuje najczęściej w grupach społecznych/politycznych o niskiej kulturze politycznej i prawnej charakteryzujących się dość słabo rozwiniętą demokracją. Niezdolność mas do rozróżnienia realistycznych propozycji od demagogii, stanowi wszystkie te cechy niskiej kultury politycznej, które są aktywnie wykorzystywane przez przywódców politycznych celem mobilizacji poparcia.

Autorka postrzega populizm przez pryzmat jego przejawów – irracjonalizmu, racjonalizmu i technokracji.

Słowa kluczowe: *populizm, nauki polityczne, ideologia, przywódca polityczny, charisma, system polityczny, reżim polityczny, ruch polityczny, partia polityczna, procesy transformacyjne, postkomunizm.*

Introduction

Numerous and varied vocabulary definitions of populism interpret it as a type of policy, a particular political phenomenon, as a movement, as a term, denoting several distinct concepts, etc. Today, it is possible to distinguish several more or less clearly defined approaches to the interpretation of the category of populism, within which various aspects of this phenomenon are related to its definition.

According to one definition, populism is understood as a foremost specific discursive style, a kind of political argumentation (rhetoric) based on a dichotomous juxtaposition of either socio-political “good” or “evil”.

According to some researchers, populism is proposed to be considered as a kind of ideology, namely, an ideology with a “blurred”, fuzzy center capable of encompassing elements of different, even opposite, ideological systems, in the traditional classification.

The importance of the problem of populism

The emergence of populism, at the paradigmatic level, involves the analysis of methodological reflection, through which the concept of populism is studied. The analysis of the research methodology provides the basis for the future development of this field of research, and also, to some extent, stimulates the creation of a professional community that practices scientific discourse on the inculcation of populism.

The emergence of the term “populism” is related to a particular story in the history of the United States, especially – the activities of the Populist (People’s) Party in the 1890s, which at one time played a significant role in the political development of this country. In the post-war period, the term “populism” was used to refer to another, very different socio-political phenomena – individual dictatorships in Latin America, post-colonial regimes in some countries in Asia and Africa, and later – many European political parties. Therefore, there is no single, universally accepted formulation, which should refer to this term and its definitions. (Kiyanka, 2015, p. 67)

Measures of populism

We, herewith, present a peculiar approach to the interpretation of populism through the “irrational”, “rational” and “technological” dimensions.

The irrational slice in the context of ideology should be noted as irrational. Populism lacks core values, so it can be added to different ideological positions: it can be revolutionary, conservative, libertarian, and nationalist. Populism emerges as a specific characteristic feature of different movements and political ideologies. P. Taggart noticed that populism works against elites and institutions. Hence, the nature of this is different, and so is the nature of populism.

Another characteristic feature of populism, according to P. Taggart, is that populist movements usually flourish in times of crisis. The researcher has lin-

ked this to the defining feature of populism – the short-lived existence of populist movements that “lose face” when they become part of the opposing structures. The ordinary high personalization of populism, which makes it so “spectacular”, determines that it, by the witty definition of the researcher, has a “shelf life” that coincides with a similar property of a leader. (Taggart, 2000)

In trying to outline the state of affairs with the use of the category of “populism” in Ukrainian political science, it is necessary to state that there are no studies in the national political science literature that would be specifically focused on the problem of its exact description and definition. However, in the context of solving other research problems, domestic scholars have provided a number of definitions of populism. When there is no precise definition, the author’s interpretation is also ambiguous.

The Ukrainian political scientist – A. Romanyuk offered his own list of “indicators” of populism pertaining to a particular party or movement, to which he assigns:

- 1) lack of specificity, versatility of a program that does not appeal to a particular social group;
- 2) opposition of the authorities and the people;
- 3) the leadership type of the party, together with the weakness of internal party democracy;
- 4) the planting of a dichotomy in the assessment of political life, a contrasting contrast between “one’s” (right, good) and “another” embodying evil;
- 5) appeal to universal characteristics: solidarity, brotherhood, justice, in isolation from the real features of the situation of certain social groups;
- 6) hyperbolized social orientation of election promises and actions;
- 7) lack of formalized ideology.

The scientist also identified anti-intellectualism inherent in populists. Thus, A. Romanyuk views populism as a set of characteristics of political movements or parties that are not directly related to their ideological orientation. In his opinion, populism is inherent in almost all Ukrainian political parties in larger or smaller “doses”. (Romanyuk, 2013, p. 41)

Another researcher – T. Rad found two approaches to the interpretation of populism. The first is to interpret it as political rhetoric, and the second – as a style of politics, but he did not make his own choice, noting that populism is “synthetic” and “combines elements of theories, and doctrines.” Besides, the researcher identified nine features of populism “as a political phenomenon”:

- 1) anti-intellectualism: populism idealizes the masses and confronts them with the elite;

- 2) formal democracy, where populism is not really democratic;
- 3) appeal to an idealized image of a “better past”;
- 4) own and other interpretation of the past and future;
- 5) populists offer a third – not capitalist and not socialist – path of social development;
- 6) hostility to foreign capital;
- 7) absolutization of people’s values, culture and customs, while at the same time confrontation with conservative elements;
- 8) the irrationality that T. Rad sees in the appeal to the feelings and emotions of the masses;
- 9) populism favors movements over political parties. (Rad, 2010, p. 287)

In my opinion, the list of the above features of populism combines different views, and its interpretation undertaken at different levels – cultural, socio-economic, and also in terms of political technologies, makes it impossible to distinguish the key features in this list. Let us note T. Rad’s remark, regarding the confrontation of populism with conservatism. Conservatism is usually associated with traditionalist elites, so it appeals to the traditional culture of higher (pertaining to the past) layers of society. However, it is not associated with the majority of the people. (Rad, 2010, p. 25)

Therefore, what is true now is, as a matter of fact, the true majority principle. So, it is true as something contractual and binding, but by no means unambiguous. As a consequence, the whole apparatus of political argumentation of populism is a fact of “inflation of words.” Words lose their value, primary meaning, unambiguity. Irresponsible inflating of the semantic field reduced the specific weight of the word, relying only on a symbolic function present in the process of a communicative act. All this causes that populism is often identified with demagoguery.

In terms of morality, populism is a completely negative phenomenon. Its immorality lies in manipulating and distorting people’s confidence; populism, by the act of misleading, destroys citizens’ trust in politics and politicians, devaluing the best ideas and values.

Rational aspect of populism

The rational dimension of populism contains a theoretical understanding of the phenomenon of populism in works by Mudde who emphasizes the ambivalence of populism’s relationship with democracy. A potentially positive effect of populism is its ability to represent and mobilize politically marginalized groups, to create “cross-class” coalitions, and to emphasize de-

mocratic accountability. However, excessive populism, especially populism in power, can have a profound negative impact on society. (Mudde, 2015)

Important for outlining the modern understanding of populism in political science, is the scholarly analysis of its interaction with the democratic system. The questions are formulated as follows: is populism merely a threat, or a force that can, in principle, be able to correct, and even improve, the democratic order? Researchers have found ambiguity – ambivalence in the influence of populist forces on the functioning of modern democracies.

However, (and this is agreed by the majority of researchers) the populist understanding of democracy as an embodiment of the majority's ruling will entail some contradiction with the interpretation of democracy as a system that combines the majority principle with the mechanism of restraints and counterbalances, as well as with the guarantees of fundamental rights and freeness.

Populism can therefore be both a threat and an adjustment of democracy. According to C. Mudde and S. Kaltwasser, the total effect of populism depends on whether or not a democratic system is consolidated, and whether populists are in power or in the opposition. In consolidated democracies, populists in the opposition have little positive influence on democracy, and generally, have little influence on democracy. Instead, in unstable democracies, populists in the opposition can be a corrective to democracy and have a strong negative influence on power. (Mudde, 2015)

According to J. Kateb, populism is inevitable in democracy, especially mass capitalist democracy. The existence of populism is even desirable, of course, provided that it remains only as one of the ingredients of the mixture. (Kateb, 2018) When populism becomes too influential, we think that it is worth mentioning the metaphorical formulation of B. Arditti, quoted by N. Gidron and B. Bonikowski, who compare populism with a drunken guest at a feast, who begins to raise irrelevant questions that actually reveal important hidden problems. (Gidron & Bonikowski, 2013, p. 248)

Technological dimension

The technological dimension of populism conceptualizes it as a political strategy. Under this approach, populism can be seen as a political choice, a political organization, and as a form of political mobilization. Thus, the key notion for defining populism is power (or the struggle for it), which relies on mass support to bypass the complex system of representative institutions. (Kiyanka, 2016, p. 46)

The today's influential approach to the analysis of the phenomenon of populism is to interpret it as primarily a discursive style. The point is that populism is not an ideology but a characteristic feature of political broadcasting, a way of political expression used by politicians of different, even opposing views, supporters of different ideological systems. This approach is supported by, for example, the American researcher – M. Kazin. (Kazin, 1998, p. 407) With this question in mind, populism or the populist category acquires a certain quantitative dimension. In other words, it can be interpreted as a certain quantitative level of the use of special means of political expression. That is, when the dichotomous discourse of socio-political “good” and “evil” reaches certain signals for attracting attention, one can speak of its populist character. Within this concept of populism, the task of the researchers of this phenomenon is not to determine, for example, whether a particular party is populist, but to measure the level of populism inherent in it, which at least, in small doses, is inherent in all political actors.

To sum up, we note the following: nowadays, in the Ukrainian specialized literature, populism is defined as a form of political rhetoric, style of politics, a certain type of political consciousness, or political technology (within the latter definition – as a technique of consciousness manipulation, a form of mobilization and manipulative practice, etc.). Not all researchers emphasize the ambiguity and variability of populism. Some of them refrain from defining it, and try to identify a number of characteristic features of populism. (Romanyuk, 2012, p. 32)

There is a visible consensus on some of these definitions present in the political science environment. It is a “diagnostic” form showing the contrast between the “people” and the “elite”, and associated with the dichotomy of “one’s” and “another’s”. The views of the researchers also coincide with the statement of the prominent leadership character of populism – populist politics. In general, Ukrainian political science did not formulate the notion of “populism” in the universally accepted definition, leaving some scholars with a choice.

Despite the fact that the term “populism” is used often enough, a direct discussion on its essence has not yet occurred. The lack of unambiguous understanding of the widespread term “populism” in Ukrainian political science reflects the state of affairs with theoretical understanding in modern political science. The populism category has been used by scholars for decades to analyze the very different socio-political phenomena in different parts of the world. One may mention the existence of several alternative definitions of populism in the specialized literature. It is about its understanding of the di-

scursive style where the attention is paid to a specific ideology (“center-wide” ideologies) or a political strategy (in other words – political technology).

Researchers unanimously acknowledge the ambivalence of populism’s relationship with democracy. A populist movement or a party can be a factor contributing to the expansion of political participation, involvement in the decision-making process of certain social groups that have previously been ignored, and thus a tool for correcting and improving democracy. At the same time, they very often contain some potential for the “tyranny of the majority” embodied in the character of a certain leader, a threat to the constitutional system and minority rights. The populist appeal to the “people” is almost always overtly simplistic and hostile to social realities. (Panizza, 2005)

It is worth acknowledging the content of the arguments in favor of the refusal to use the category of “populism” in the analytical apparatus of modern political science as one that is interpreted very differently, and as one having a common definition of very different phenomena. However, the scientific community today is characteristic of the disagreement of opinion. Comparing the reasoning and argumentation of different researchers, in our study, we choose as an initial understanding of populism – first: the influence of dichotomous discursive style, and second: the influence of manipulative technology. Despite a solid argument for interpreting populism as an ideology, we do not agree with this point of view.

We also accept as characteristic (but not decisive) features of populism, its leadership character and tendency to oppose the majority and constitutional components of the democratic system. Finally, another common feature of populism is its eclecticism, i.e. the blending of approaches, positions of ideological and political systems that usually oppose each other. We believe that our proposed study should allow us to adjust or supplement the initial provisions formulated here, in particular, by relying on Ukrainian material, which, in the context of the chosen topic, is undoubtedly very rich.

The Ukrainian experience of populism

The scientific interest in the chosen issue is due to the agenda of Ukrainian politics and a set of modern challenges faced by the State. It is evident that the political system of Ukraine undergoes a significant transformation: on the one hand – under the influence of European integration, on the other – under the pressure of internal crisis phenomena and foreign policy pressures in the form of a hybrid war. Populism, in conditions of political, economic, and ethnopolitical instability, is gaining influence, turning into widespread

political technology aimed at ensuring the achievement of short-term political goals.

In the Ukrainian popular political lexicon of the years of independence, the term “populism” belongs, apparently, to those most often used lexical units. At the same time, the overuse of the term is assigned either to government officials or political opponents. In domestic political controversy, the reproach to populism almost always means the assertion that it is a proposal of seemingly attractive but impossible to implement or even harmful options for solving certain problems, often socio-economic. (Kuzio, 2009, p. 77)

However, addressing the issue of populism as a category of political analysis makes it possible to conclude that it is a much more complex and multidimensional concept. In the scientific community, consensus on the understanding of populism has not developed today, and researchers' approaches are marked by different accents, embodying different views on the meaning of the term “populism”. It appears both as a political technology and a specific characteristic of political activity, and a socio-political phenomenon, even ideology.

Researchers have found a populist component in the activity of virtually all Ukrainian parties – a link between populism and the crisis of the representative function of the domestic party system. At the same time, there are considerable differences in the views of political scientists. A comprehensive, analytical study of populism in Ukrainian historiography has not yet been conducted.

Thus, it can be stated that the concept of populism is a multifaceted political construct that performs an integrative-cognitive function of structuring and constructing a complex and contradictory political reality with elements of social, discursive, and praxeological eclecticism. A characteristic feature of the actualization of populism is the extreme parameter of the functioning of the state-political organism of the society, and the value projections of its existence. The socio-political crisis in the society, which generates the conceptual platform of populism, reflects the objective need for the democratization of the foundations of the social order and life.

Conclusions

The notion of populism has been established in political science and history studies in the absence of a universally accepted and unambiguous interpretation of the term. The thesis on the complexity of the definition and a huge variety of manifestations of populism marks the beginning of reflection on populism which, however, was researched by many experts in

the field of political science. An integral part of the scientific debate, which has been going on for several decades, is the idea that the category of “populism” as a tool of political analysis should be abandoned altogether. However, the considerable achievements of populism researchers provide today a solid foundation for its active use by political scientists.

There is a clear need to reduce the level of populism in the Ukrainian socio-political life, and to weaken its influence on the process of struggle for power and the adoption of managerial decisions. This could be facilitated by a series of measures. That is, the saturation of the information space with objective analytical materials that would demonstrate the possible consequences of attempts to implement populist proposals – their harmful or unrealistic applications. A public space could be a media platform potentially capable of counteracting populism.

The Ukrainian election race, especially the presidential one, is characterized by another populist trait – an attempt to provide political rivalry as a struggle for good and evil. This was due to the deep cultural and mental differences between different Ukrainian regions. It is possible to reveal the presence of populist traits in most of the significant Ukrainian political forces. It appears that for some politicians, party ideology often becomes a scene for attracting and attaining the interests of certain business groups.

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Kto ratuje jedno życie... Sprawiedliwi w debacie publicznej

Whoever saves one life... Righteous in the public debate

Abstrakt

W artykule poruszam wątek ustanowienia w Polsce Narodowego Dnia Pamięci Polaków Ratujących Żydów pod okupacją niemiecką. Od 2018 roku jest to święto państwowe, poświęcone wszystkim tym, którzy w czasie II wojny światowej nieśli pomoc prześladowanym Żydom. Ten ważny temat jest często wykorzystywany w debacie publicznej i narracji politycznej w sposób instrumentalny, często jako kontrargument w przypadku wspominania o negatywnych postawach Polaków w czasie II wojny światowej. Bez rzetelnej debaty włączającej głos Sprawiedliwych i badań historycznych nie będzie możliwe prawdziwe upamiętnienie tych wszystkich, którzy w czasie Zagłady pomimo niebezpieczeństwa zdecydowali się ratować Żydów.

Słowa kluczowe: *Sprawiedliwi wśród Narodów Świata, debata publiczna, instrumentalizacja Sprawiedliwych, upamiętnienie.*

Abstract

The article highlights a discussion on the celebration of the National Day of Remembrance of Poles who saved Jews Under the German Occupation. The Day, established in Poland in 2018, honors those who during World War II helped the persecuted Jews. This important subject is often used instrumentally in the public debate and political narration as a counterargument in discussions about the negative attitudes of Poles during World War II. Without a reliable debate including

the voices of the Righteous, and without a historical research, it will not be possible to truly commemorate all those who despite danger, decided to save the Jews.

Key words: *Righteous among the Nations, public debate, instrumentalization of the Righteous, commemoration.*

Wprowadzenie

Relacje polsko-żydowskie, szczególnie te w czasie II wojny światowej, są wciąż żywym tematem debaty publicznej i politycznej, który wpisał się również w działania z zakresu polityki historycznej prowadzonej przez państwo. Jednym z podejmowanych wątków w tym zakresie jest temat pomocy Żydom w czasie zagłady. Ratujący, spośród których część odznaczona została tytułem Sprawiedliwy wśród Narodów Świata nadawanym przez państwo Izrael, są często kontrargumentem w dyskusji o przypadkach wydawania Żydów niemieckim okupantom przez Polaków.

O historii ratowania wiemy zarówno z przekazów ocalonych, jak i ratujących. Często to właśnie ich głosy są wykorzystywane do tworzenia narracji o postawie polskiego społeczeństwa wobec zagłady Żydów. Niestety pojawiają się również przypadki instrumentalizacji zarówno samych Sprawiedliwych, jak i ich relacji, gdzie w dyskursie publicznym i narracji politycznej pomija się niektóre wątki, zwłaszcza te dotyczące nie tylko pomocy polskiego społeczeństwa, ale i wydawania Żydów czy ratujących.

W tekście chciałabym w bardzo skrótowy sposób przedstawić tło ustanowienia Narodowego Dnia Pamięci Polaków ratujących Żydów pod okupacją niemiecką i pokazać na jednym przykładzie, jak w przestrzeni publicznej może wyglądać instrumentalne wykorzystanie historii niosących pomoc.

Geneza powstania dnia pamięci

24 marca 2018 roku w Polsce po raz pierwszy obchodzono Narodowy Dzień Pamięci Polaków ratujących Żydów pod okupacją niemiecką. Został on ustanowiony z inicjatywy Prezydenta RP Andrzeja Dudy przez polski parlament.

O działaniach mających na celu ustanowienie tego święta Prezydent poinformował w trakcie obchodów 75-lecia powstania Rady Pomocy Żydom „Żegota”. W prezydenckim przemówieniu znalazła się informacja o tym, że niebawem Sejm będzie mógł zapoznać się z przygotowanym przez niego pro-

jektem ustawy w tej sprawie. Początkowo dniem obchodzenia tego święta miał być 17 marca, czyli dzień, w którym w 2016 roku uroczyście otwarto Muzeum Polaków Ratujących Żydów podczas II wojny światowej im. Rodziny Ulmów w podkarpackiej miejscowości Markowa. Ostatecznie jednak dzień pamięci o Polakach ratujących Żydów ustanowiono 24 marca¹. Data ta nawiązuje do patronów Muzeum w Markowie – Józefa i Wiktorii Ulmów oraz ich dzieci. Tego dnia 1944 roku Ulmowie zostali zamordowani za pomoc niesioną Żydom. Uchwalona przez parlament ustawa została podpisana przez Prezydenta 20 marca 2018 roku, na kilka dni przed pierwszymi obchodami.

Zgodnie z ustawą celem ustanowienia tego święta, które ma rangę święta państwowego, było oddanie hołdu *Obywatelom Polskim – bohaterom, którzy w akcie heroicznej odwagi, niebywałego męstwa, współczucia i solidarności międzyludzkiej, wierni najwyższym wartościom etycznym, nakazom chrześcijańskiego miłosierdzia oraz etosowi suwerennej Rzeczypospolitej Polskiej, ratowali swoich żydowskich bliźnich od Zagłady zaplanowanej i realizowanej przez niemieckich okupantów. (Ustawa z dnia 6 marca 2018 roku...)*

Jednocześnie, co podkreślali debatujący nad ustawą posłowie, celem ustanowienia tego dnia jest także walka z fałszywą wersją historii i ukazanie realiów bohaterstwa Polaków w czasie okupacji niemieckiej.

Potwierdzeniem tego mogą być słowa reprezentującego Prawo i Sprawiedliwość Dariusza Piontkowskiego: *Pojawiają się w przestrzeni publicznej pojedyncze nazwiska, padło tu już nazwisko Ulmów, dotyczy to także Kowalskich, oczywiście Ireny Sendlerowej, Zofii Kossak-Szczuckiej, Witolda Pileckiego, Jana Karckiego, polskiego ambasadora Konstantego Rokickiego czy Henryka Sławika, ale tych nazwisk znanych Polakom i społeczności międzynarodowej powinno być dużo, dużo więcej, po to, by mógł być znany prawdziwy kontekst tego, co działo się wówczas w Europie. (Stenogram z 59. Posiedzenia Sejmu..., s. 289)*

Wtórował mu partyjny kolega Jacek Kilian, który w trakcie debaty sejmowej powiedział: *W obliczu antypolskiej kampanii szkalującej Polaków w związku z Holokaustem uważam za bardzo zasadne ustanowienie Narodowego Dnia Pamięci Polaków ratujących Żydów. (Stenogram z 59. Posiedzenia Sejmu..., s. 294)*

Sam inicjator tego święta, Prezydent Andrzej Duda, podczas obchodów rocznicy powstania „Żegoty” między innymi tak uzasadniał podjęte działania w celu ustanowienia dnia poświęconego Polakom ratującym Żydów: *Chciałbym, żebyśmy o tych ludziach, o tym dniu, o tamtych wydarzeniach zawsze pamiętali jako Polacy, pokazując także światu – bo dziś, w dobie, gdy histo-*

¹Inną propozycją daty, kiedy to miałby być w Polsce obchodzony ten dzień, był 4 grudnia, czyli w rocznicę powstania Rady Pomocy Żydom „Żegota”.

rię w różny sposób próbuje się kształtować, często fałszując jej rzeczywisty obraz – abyśmy wyraźnie mówili, kto był zbrodniarzem, a kto bohaterem, kto wykazał się miłosierdziem, a kto był draniem zasługującym na potępienie. (Przemówienie Prezydenta RP...)

Choć w nazwie tego święta nie pojawia się zwrot „Sprawiedliwy wśród Narodów Świata”, to mamy świadomość, że dzień ten właśnie w dużej mierze im jest poświęcony. Jak słusznie zauważono w toku prac nad ustawą, nie każdy pomagający został odznaczony tytułem Sprawiedliwego. Jednak polskie obchody Europejskiego Dnia Pamięci o Sprawiedliwych, przypadającego na dzień 6 marca, nie przebijają się zbyt mocno do świadomości społecznej. Dlatego, zdaniem zwolenników ustanowienia w Polsce Narodowego Dnia Pamięci Polaków ratujących Żydów, podczas okupacji niemieckiej należy przywrócić pamięć o tych osobach, oddając im należny hołd i szacunek. Głosy takie padały z każdej strony sceny politycznej reprezentowanej w polskim sejmie. *Polacy, którzy ratowali Żydów w czasie II wojny światowej, to są nasi bohaterowie. Wszyscy tak uważamy tutaj na tej sali. To są ludzie najwyższej próby, którzy zasługują i na pamięć, i na szacunek, i na pomniki, i na muzea, i na swoje święto państwowe, i na bycie przede wszystkim przykładem dla każdego z nas.* – przekonywała Joanna Scheuring-Wielgus reprezentująca w ówczesnym czasie Nowoczesną. *Pamięć i tożsamość są dla nas bardzo ważne. Ta pamięć dotyczy wspaniałych, wybitnych bohaterów Polski, Europy i świata, ludzi, którzy byli przyzwoici wobec swoich braci, współobywateli, którzy ratowali ich w najtrudniejszych, najbardziej makabrycznych okolicznościach, jakie można sobie wyobrazić, pod karą i groźbą śmierci dla siebie, swojej rodziny, a czasem dla całych społeczności, dla całych wsi i osiedli. Należy im się niezwykle szacunek i niezwykle hołd.* – te słowa padły z ust Władysława Kosiniaka-Kamysza z Polskiego Stronnictwa Ludowego. Z kolei Dariusz Piontkowski z Prawa i Sprawiedliwości podkreślał, że *dzisiaj jako suwerenne państwo mamy nie tylko prawo, ale wręcz obowiązek przypominać o tych, którzy stanęli na wysokości zadania, którzy byli dobrymi chrześcijanami, dobrymi współobywatelami, którzy ratowali swoich braci zagrożonych przez okupantów niemieckich.*

Zgodnie z założeniami państwa izraelskiego, przyznającego tytuł „Sprawiedliwi wśród Narodów Świata”, odznaczenie to nadawane jest osobom nieżydowskiego pochodzenia, które w czasie II wojny światowej bezinteresownie, często narażając swoje życie bądź wolność, udzielały pomocy prześladowanym Żydom². Procedura przyznawania odznaczeń i medali rozpoczęła się

²Zgodne z kryteriami podstawowymi obowiązującymi we wszystkich krajach warunki uzyskania tytułu i otrzymania medalu są następujące: – osoba aktywnie działała na rzecz

w 1963 roku. Spośród wszystkich odznaczonych największą grupę stanowią Polacy³.

Sprawiedliwi często pojawiają się w różnego rodzaju dyskusjach i sporach na temat relacji polsko-żydowskich oraz postaw Polaków w czasie II wojny światowej. Zdarza się, że są wykorzystywani instrumentalnie jako argumenty „za” lub „przeciw” w toczących się debatach, zarówno politycznych, jak i naukowych. Sama dyskusja sejmowa nad ustanowieniem dnia im poświęconego bardzo wyraźnie to pokazuje.

Dla opozycji uchwalanie święta w momencie toczącej się bardzo żywiołowej i emocjonalnej dyskusji o nowelizacji Ustawy o Instytucie Pamięci Narodowej⁴ i zawirowań dyplomatycznych na linii Polska – Stany Zjednoczone oraz Polska – Izrael to zły czas, który pokazuje właśnie instrumentalne podejście do Sprawiedliwych.

Jacek Protasiewicz reprezentujący w tamtym okresie klub parlamentarny Polskiego Stronnictwa Ludowego – Unii Europejskich Dyplomatów tak mówił w Sejmie: *Zamiast ustawy, która ma oddać hołd i szacunek tym niezwykłym, dzielnym, heroicznym ludziom, którzy z narażeniem własnego życia pomagali żydowskim obywatelom polskim, żydowskim współbraciom, wy w tej debacie, robicie z tej ustawy oręż polityczny. Zaś Kamila Gasiuk-Pihowicz z Nowoczesnej przekonywała: *Niestety, uchwalenie tej ustawy w obecnym momencie niesie ze sobą ryzyko instrumentalnego potraktowania pamięci o Sprawiedliwych przez obecny rząd. Istnieje poważne ryzyko, że właśnie ta ustawa**

ocalenia jednego lub więcej Żydów, którym groziła śmierć lub wywózka do ośrodka głady, – w związku z udzieloną pomocą osoba ryzykowała życie, wolność lub stanowisko, – motywacją była bezinteresowna potrzeba niesienia pomocy prześladowanym Żydom, której celem nie było uzyskanie korzyści materialnych lub innych zysków, – istnieją zeznania uratowanych lub przynajmniej jednoznaczna dokumentacja opisująca rodzaj udzielonej pomocy i jej okoliczności.

³Według statystyk udostępnionych na stronie Instytutu Yad Vashem odznaczonych tytułem Sprawiedliwy wśród Narodów Świata Polaków na dzień 1 stycznia 2019 roku było 6992.

⁴Nowelizacja dotyczyła m.in. dodania do treści ustawy artykułu Art. 55a. 1. *Kto publicznie i wbrew faktom przypisuje Narodowi Polskiemu lub Państwu Polskiemu odpowiedzialność lub współodpowiedzialność za popełnione przez III Rzeszę Niemiecką zbrodnie nazistowskie określone w art. 6 Karty Międzynarodowego Trybunału Wojskowego załączonej do Porozumienia międzynarodowego w przedmiocie ścigania i karaniania głównych przestępców wojennych Osi Europejskiej, podpisanego w Londynie dnia 8 sierpnia 1945 r. (Dz. U. z 1947 r. poz. 367), lub za inne przestępstwa stanowiące zbrodnie przeciwko pokojowi, ludzkości lub zbrodnie wojenne lub w inny sposób rażąco pomniejsza odpowiedzialność rzeczywistych sprawców tych zbrodni, podlega grzywnie lub karze pozbawienia wolności do lat 3. Wyrok jest podawany do publicznej wiadomości. Ostatecznie po kilku miesiącach dokonano kolejnej nowelizacji i w konsekwencji usunięto ten artykuł.*

może zostać odebrana źle poza granicami naszego kraju. Ucierpi na tym pamięć o czynach sprawiedliwych...

Temat instrumentalizacji i upolitycznienia Sprawiedliwych pojawił się także w dyskusji publicystycznej i naukowej na długo przed ustanowieniem dnia im poświęconego. Politolog Piotr Forecki pisał na łamach „Krytyki Politycznej”: *Polacy ratujący Żydów podczas II wojny światowej to temat dobrze zadomowiony w różnych przestrzeniach dyskursu publicznego. Z przyznanymi przez Yad Vashem odznaczeniami Sprawiedliwych wśród Narodów Świata czy bez nich Polacy ci doskonale służą aktualnej polityce historycznej, a przede wszystkim tej zagranicznej i wizerunkowej*⁵. (Forecki, 2016)

Podobny ton wypowiedzi możemy dostrzec u historyka Dariusza Libionki, który w jednej z publikacji poświęconej Sprawiedliwym wśród Narodów Świata, podkreślał: *W ostatnich latach jesteśmy świadkami działań podejmowanych przez różne środowiska i instytucje, zmierzających do uhonorowania Polaków pomagających Żydom, [...] Niektóre z takich inicjatyw wyrastają z autentycznej potrzeby, [...]. Inne z kolei mają charakter wybitnie koniunkturalny, będąc obliczone albo na uzyskanie doraźnych, albo długofalowych korzyści politycznych.* (Libionka, 2008, s. 12)

Mamy zatem potrzebę pamięci o wszystkich tych, którzy w czasie II wojny światowej nieśli pomoc żydowskim współobywatelom. Jednocześnie zamiary ustanowienia tego dnia odczytywane są jako próba przebiccia się do świadomości polskiej i światowej wiedzy o bohaterskich czynach Polaków pomagających Żydom, co odczytywane może być jako instrumentalizacja tych wszystkich osób lub też jako próba wyparcia z dyskursu publicznego nieprawdziwego obrazu postawy polskiego społeczeństwa w czasie II wojny światowej. Te dwa wykluczające się stanowiska pojawiają się przy okazji debat o Sprawiedliwych, o II wojnie światowej, o zagładzie Żydów czy o stosunkach polsko-izraelskich. Nic nie zapowiada zmiany w tych dwóch narracjach.

Głos Sprawiedliwych

Historie Sprawiedliwych zbierane są na różne sposoby. W pierwszych latach po wojnie głównymi dostarczycielami wiedzy o ratujących byli ocaleni Żydzi. Mówiło się o tym także w polskich rodzinach, choć w wielu przypadkach panowało milczenie z uwagi na strach przed sąsiadami. Ten sam strach towarzyszył pomagającym w czasie II wojny światowej. W niektórych przypadkach trwał nie tylko w latach powojennych, ale i znacznie dłużej. (Reszka, 2006)

⁵Więcej na ten temat Forecki pisze w swojej pracy *Po Jedwabnem. Anatomia pamięci funkcjonalnej*.

Z uwagi na warunki przyznawania medalu historii o ratowaniu Żydów pojawiło się więcej po 1963 roku. Aby otrzymać tytuł, należało zostać zgłoszonym przez uratowanego, który miał poświadczyć o otrzymanej pomocy. Dziś mamy dość dużo materiałów, z których możemy dowiedzieć się, jak wyglądało życie pomagających Żydom w czasie II wojny światowej. Część z nich to relacje ratujących, wiele historii znanych jest z przekazów dzieci Sprawiedliwych – część z nich także uczestniczyła w pomocy, część zna historię jedynie z przekazów rodziców bądź ratowanych.

Co nam mówią relacje zebrane w ramach projektu „Światła w ciemności – Sprawiedliwi wśród Narodów Świata”? Bardzo wiele. Nie sposób odnieść się do wszystkich ważnych wątków, które pozwolą zrozumieć realia panujące w czasie II wojny światowej, sytuację ukrywających się Żydów i pomagających im Polaków, motywy działania tych, którzy chcieli nieść pomoc. Sami często nie mówią o heroizmie czy bohaterstwie, raczej o zwykłym ludzkim, czasem chrześcijańskim obowiązku. O ile w wydarzeniach organizowanych w ramach oficjalnych obchodów Narodowego Dnia Polaków ratujących Żydów pod okupacją niemiecką wiele mówi się właśnie o tych bohaterskich postawach, to w przypadku opowieści Sprawiedliwych lub ich rodzin pojawiają się także bardzo smutne historie związane z postawami polskiego społeczeństwa nie tylko wobec Żydów, ale i Polaków niosących im pomoc.

Ciekawym tego przykładem jest tekst historyka z lubelskiego oddziału Instytutu Pamięci Narodowej Rafała Drabika, który w dodatku historycznym do „Naszego Dziennika” z okazji obchodów Narodowego Dnia Pamięci Polaków ratujących Żydów napisał krótki artykuł *Zapomniani Sprawiedliwi. Paweł i Wiktoria Trzciniński – zamordowani za pomoc Żydom*. Tekst został poświęcony małżeństwu z Biłgoraja, które w marcu 1943 roku zostało rozstrzelane za pomoc Żydom. Drabik podaje, że zgodnie z relacją córki Trzcinińskich – Gabrieli Gorzandt – ukrywający się Żydzi najpewniej sami doprowadzili do tego, że Niemcy dowiedzieli się o ich kryjówce. Potwierdzeniem tej tezy był cytat wypowiedzi Gabrieli Gorzandt: *Żydzi mieli jedną wadę: jeżeli było niebezpieczeństwo, to oni zamiast siedzieć cicho, to wtedy było aj-waj, aj-waj. I to było powodem, że przez tę ścianę z grubych desek musieli usłyszeć – bo tak mi opowiadał taki pan Stach, który też tam pracował po tym, jak już Żydów wyeliminowali z życia takiego codziennego, już nie pracowali u rodziców. Opowiadał mi, jak doszli do tego, że tam Żydzi byli ukryci. Przyszedł gestapowiec – podobno, nie twierdzą, że tak było – do tego magazynu i jak Żydzi usłyszeli tę rozmowę niemiecką, to zaczęli tam niektórzy płakać, tak jak to oni mieli w zwyczaju, lament ogromny. I podobno w ten sposób doszli do tego.* (Drabik, 2020, za Dąbrowska, 2008, s. 35)

Z tekstu nie dowiemy się, skąd pochodzi ten cytat. Natomiast z korespondencji z autorem wiemy, że z zasobów online Ośrodka Brama Grodzka – Teatr NN w Lublinie. Relacja została zamieszczona w wydanej przez Ośrodek Brama Grodzka – Teatr NN publikacji, będącej pokłosiem projektu „Światła w Ciemności – Sprawiedliwi wśród Narodów Świata”. Historia ta znajduje się także w zasobach nline Muzeum Historii Żydów Polskich Polin, które prowadzi portal poświęcony Sprawiedliwym – „Polscy Sprawiedliwi – przywracanie pamięci”.

Drabik podkreśla, że inna wersja, którą podała córka Trzcińskich, o tym, że Niemcy mogli sami dowiedzieć się o przechowywanych Żydach, jest mało prawdopodobna. Inaczej z kolei tę historię mi opowiadała (nagrywałam z nią rozmowę w ramach projektu realizowanego przez Bramę Grodzką): *Inną wersję słyszałam, której jestem skłonna uwierzyć, że wydał rodziców jeden mieszkaniec Biłgoraja, który po prostu zazdrościł, że ojciec ma ten skup skór, sam był masarzem. I dlaczego jestem skłonna podejrzewać? Bo po wyzwoleniu, jak przyjechałam do Józefowa, ludzie, którzy pracowali w wywiadzie Armii Krajowej, powiedzieli mi dokładnie nazwisko tej osoby. I nie wierzyłam, daleka jestem od tego, żeby posądzać o jakąś podłość. Ale dało mi do myślenia, jak mnie milicja wezwała i prowadzili dochodzenie. Żądali, żebym powiedziała, kto wydał rodziców. Nie wspomniałam nazwiska tego pana, bo nie mogłam wspomnieć, bo nie miałam pewności, ale oni mnie pytali, czy to on. I jeszcze to mi nic nie dało do myślenia. Na drugi dzień po tym przesłuchaniu przyszedł ten gość do mnie i pytał, o co mnie pytali. I sam zaczął mówić „Ludzie mówią, że ja wydałem rodziców, to nieprawda”. Więc to mnie po prostu utwierdziło w przekonaniu.* (Dąbrowska, 2008, s. 35)

W tekście Drabika nie zostały przytoczone te słowa, pojawiła się za to informacja o zmanipulowaniu historii Wiktorii i Pawła Trzcińskich, którego miała dopuścić się historyczka Alina Skibińska w głośnej książce wydanej przez Centrum Badań nad Zagładą Żydów *Dalej jest noc. Losy Żydów w wybranych powiatach okupowanej Polski*. Zdaniem autora nieprawdziwe informacje zawarte są także na stronie wspomnianego projektu „Polscy Sprawiedliwi – przywracanie pamięci”.

Jak zatem możemy skomentować przytoczenie tylko jednej wersji wydarzeń, której wyboru dokonał autor artykułu? Czy taki dobór materiału nie odbiera głosu ratującym i ich rodzinom? Ten przykład pokazuje, jak bardzo łatwo można instrumentalizować historię tych, którzy nie mogą już w żaden sposób odnieść się do przedstawionej narracji – Trzcińscy zostali zamordowani w 1943 roku, zaś ich córka zmarła w 2018 roku. Bohaterstwo tych, którzy ratowali Żydów w czasie II wojny światowej, jest bezsprzeczne, ale

nie da się wymazać z historii także i tych postaw, które z bohaterstwem nie miały nic wspólnego. Uporanie się z tą trudną przeszłością to skomplikowane zadanie. Jednak jak przekonuje polsko-izraelski pisarz i filmowiec Etgar Keret, jest to wysiłek przynoszący wymierne korzyści, bowiem *państwa bardziej stabilne, pewne siebie, to te, które uporały się ze swoją przeszłością*. (Przerwocka-Aderet, 2016) Przepracowanie trudnych tematów może przełożyć się właśnie na wzmocnienie Polski na arenie międzynarodowej, o które tak dopominali się posłowie podczas debaty nad ustanowieniem Narodowego Dnia Pamięci Polaków ratujących Żydów.

Podsumowanie

Jak słusznie zauważa badacz zagłady Jacek Leociak, autor książki „Ratowanie. Opowieści Polaków i Żydów”, *Polskiemu dyskursowi o pomocy wciąż zagrażają trzy demony. Demon rywalizacji (w martyrologii, w bezinteresowności, w szlachetności); demon statystyki (liczenie tych, którzy ratowali, i tych, którzy za ratowanie zostali zabici, aby dowieść tezy, że „im więcej, tym lepiej”); demon trywializacji (bo przecież masowość pomocy stawia pod znakiem zapytania podkreślona wszem i wobec heroiczność czynu). Nie służy to ani Polakom, w tym przede wszystkim Polskim Sprawiedliwym, ani Żydom. I jedni, i drudzy stają się tylko narzędziem w grze toczonej ponad ich głowami*. (Leociak, 2010, s. 9)

Słowa te doskonale odnoszą się zarówno do prób instrumentalizacji Sprawiedliwych i wszystkich tych, którzy w czasie Zagłady niesli pomoc prześladowanym. Ratujący nie mogą stać się jedyną figurą polskiej narracji o II wojnie światowej. Ich czyny zasługują na najwyższe uznanie i pamięć, jednak opowiadanie o relacjach polsko-żydowskich tylko przez pryzmat Sprawiedliwych nie pokazuje całej rzeczywistości i na pewno nie służy „odfałszowaniu historii”.

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Recenzje – Review



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**A Review of „Selected Chapters in English Lexicology,
Part II: Phraseology and Word-formation”
by Klaudia Bednarova-Gibova and Petra Jasenska**

**Recenzja książki p.t. „Wybrane aspekty leksykologii
angielskiej, Część II: Frazeologia i słowotwórstwo”
autorstwa Klaudii Benarovej-Gibovej i Perty Jasenskiej**

“Selected Chapters in English Lexicology, Part II: Phraseology and Word-formation” by **Klaudia Bednarova-Gibova** and **Petra Jasenska** published by The University of Presov (Slovakia) in 2019, is, as the indicant (Part II) says, a sequel to “Selected Chapters in English Lexicology, Part I: Lexical Semantics and Lexicography” (2018). As a publication of twofold authorship, the book is also a token of cooperation between the Institute of British and American Studies at the University of Presov and the Department of British and American Studies at Matej Bel University in Banska Bystrica (Slovakia).

The main intention of the authors is, as they admit, “*to prepare a textbook which would address English phraseological and word-formation issues in a comprehensible digestible manner... thus helping English undergraduates grasp the said areas within English linguistics...*” (p. 8).

With respect to structure, the publication is divided into five main chapters: **Phraseology as a Field of Study**, **Collocations as Partner-Like Multi-Word Items**, **Morpheme as a Gate-Way to Word-Formation** – all written by Klaudia Bednarova-Gibova and **English Word-Formation Process** – written by Petra Jasenska. The final chapter – **Productivity as a Quandary in Word-Formation** is again of Klaudia Bednarova-Gibova's authorship. Each chapter ends with **Summary** and **Questions and Tasks to Think About**, which adds a useful and valuable quality to the presented and discussed material. Besides, two additional parts of the publication make it complete; this is **Glossary of Terms** which greatly facilitates the access to the ideas and observations embedded in each chapter material, and especially – **Bibliography and References** which, in turn, gives guidance to individual research and further penetration of the field of studies.

With the undergraduate students of English philology in mind, one must admit that phraseology, in their case, undoubtedly remains Achilles' heel. Therefore, the examined here publication appears to be a corner stone of lexicology, and especially phraseology as a field of language study. Hence, it is not a coincidence that **Phraseology as a Field of Language Study** is just the title of the opening chapter of the book. The chapter starts with the discussion on past achievements and present standing within the field, so it covers the period ranging from the beginning of the 20th century to the present time. Both classics, such as, for example, Charles F. Hockett or Uriel Weinreich, are referred to as well as contemporary researchers, such as, for instance, Anthony Cowie, Rosamunde Moon or Bogdan Szymanek. The mentioned here researchers, representing both the past and the present, give evidence as to the extent and divergence of the discussion which underscores the importance of phraseology, especially that the authors of the book stress that *"All non-native speakers need to be aware that mastering phraseology is as essential as learning the meaning and use of individual words if they desire their language production to be close to native patterns"* (p. 13). Relying on this conviction, the authors attempt to make students sensitive to the fact that English has always been highly "phrasal" or "formulaic", and is also the language where the linguistic co-text is responsible for meaning. Such remarks, underscored by the authors in the discussion, become simultaneously indicators not only for students but also for language instructors, showing them the idiom principle which exists, side by side, with the open choice principle. And, it is the student's competence which makes him decide which of the two principles he can follow freely.

Pursuing the discussion on phraseology as a field of language study, the authors strengthen the view that phraseology is a separate linguistic

discipline. And, following the point of view of Anthony Cowie, they direct the reader's attention to the cultural aspect of phraseology, and close their discussion on the issue by the opinion that phraseology and the related studies contribute to a better understanding of the link between language and culture. This opinion is of great significance in the context of language and culture interrelationship where, unfortunately, in the majority of schools, the language material and culture material are treated separately and, hardly ever can students be aware of that link.

Further along in the discussion the reader's attention is directed at some problematic issues, among which the authors, in accordance with Kavka's and Lipka's views, observe that *"a large number of idioms carry both a literal and figurative meaning"* (p. 18). The reader also learns that *"the ability of English phrases to be turned into lexical items, ... reveals that there is a close connection between syntax and phraseology"* (p. 19). Besides, the authors notice that *"although free combinations are conventionally thought of as compositional, collocations as semi-compositional and idioms proper as non compositional..."* (p. 19), which creates a certain problem in determining the border line between a free combination and an idiom.

The very fact of including some problematic issues in the discussion makes it valuable and useful for language teachers and instructors who are involved in English language teaching programs of studies at any level. Not only can they see the true nature of phraseology but also be sensitive to some intricacies as well as be cautious during their presentation of the teaching material.

The discussion in Chapter 1 is also devoted to idioms as traditional multi-word units, showing basic features of idioms, functions of idioms and their classification. Among numerous phraseology related issues, worth paying attention are those which deal with approaches, such as, for example, the contrastive approach or the translational approach; also proverbs, similes, phrasal verbs or clichés are thoroughly discussed, and the discussion is supported by the abundance of examples, which makes the presented material well documented.

Collocations as Partner-Like Multi-Word Items is a subsequent chapter of the examined publication.

The attempt of the opening discussion is to explain the very concept of collocation and make reference to some definitions in order to facilitate the reception of the discussed material. In consequence, the reader learns that collocations can be defined statistically and psychologically. Knowing the difference between a statistical definition and a psychological one, and being acquainted with numerous examples introduced to this part of

the chapter, the reader is familiarized with the essence of collocations. It has to be accepted that this is a very well chosen approach to the new material presentation, which turns into a preparatory step towards the further reception of the material and its analysis. Moreover, to make the material reception yet easier, the authors, following Haiyan Men's categorization, juxtapose in Table 2 (p. 42), the most commonly adopted definitions together with criteria used for the purpose of their distinction.

Yet, one more step towards further penetration of collocations is devoted to approaches. Hence, such approaches as the frequency based approach and the phraseological approach are thoroughly presented with the help of references to the literature and, contrasted. The discussion carried out in this part of the book also covers properties of collocations and their functions, putting a stress on the role collocations play in the development of creative language. Therefore, again the practical aspect of teaching collocations is raised, taking into account the student's creativity.

The closing part of Chapter 2 is focused on types of collocations, showing some basic distinctions between grammatical collocations and lexical collocations. Also, some other types are mentioned and described, including marked collocations, bound collocations or immediate and cohesive collocations. The discussion is profound and supported by numerous examples and the literature. To complete this part of discussion, a sketchy presentation of the structural composition in English lexical collocations can be found in Table 3 (p. 50), which becomes yet an additional but workable expansion of the presented material.

Not for the first time in this book, do the authors direct the reader's attention to some problems – now – related to collocations. Thus, the reader, no matter whether he is a student or a teacher, is made sensitive to the problem of first language transfer which may seriously hamper and distort the process of collocation formation in second language. In addition, a warning is given to translators as most of the collocations cannot be translated literally because native speakers, as the authors say, "*would express themselves in quite a different way, which is often caused by the natural use of collocations*" (p. 54.). So, both students and teachers have to bear in mind that English native speakers and non-native speakers use collocations, as the authors stress, differently.

The above presented opinion might be perceived as a practical indicator to all individuals involved in the teaching/learning process of English as a foreign language. Of significant importance is one more practical remark which underscores the fact that collocations should be taught from an early

stage of language exposure. However, the authors also point out that many problems and queries pertaining to the research studies on collocations and their use by native and non-native speakers still remain unanswered.

Chapter 3 – **Morpheme as a Gate-Way to Word Formation** is, *nomen omen*, entirely devoted to the morpheme concept and types of morphs in English.

The discussion starts with reminding us of the notion of the term “morpheme”, quoting the 19th century classic definition in order to pass on to the elaborated view by Bloomfield. In this way the notion of morpheme becomes easily understood, which helps the authors to go further and show a distinction between lexical and grammatical morphemes. The discussion is yet developed and shortly deals with allomorphs and their split into phonologically conditioned allomorphs and morphologically conditioned allomorphs. Moreover, free and bound morphemes are examined and described with a sufficient number of examples. The richness of the presented material supported by a plentitude of examples, both in the text and tables, facilitates the digestion of the material and makes the reader aware of such terms as derivation, inflection, suffix, prefix or affix. No doubt, this kind of knowledge gained from the study of Chapter 3 makes the students’ fundamentals in lexicology stronger.

Furthermore, the discussion is directed at some other issues in lexicology, that is base, root, and stem; each term is clearly explained and illustrated with examples. In addition, some other types of morphs in English are listed and explicitly defined as well as supported with representative forms.

The closing part of Chapter 3 is devoted to a word analysis and juxtaposes a morphematic analysis with a word-formation analysis in order to show the difference between these two types of investigation and prevent confusion. The undertaken approach greatly facilitates the penetration and understanding of a relatively complex material.

To some extent, Chapter 4 – **English Word-Formation Processes** is a direct continuation of the discussion originated in Chapter 3. As a matter of fact, the discussion is focused on the phenomenon of word as a unit of language, as well as a solution and analysis of the very process of word formation. Hence, such processes as derivation, compounding, conversion, shortening and coinage are presented and described in a very detailed way. The multitude of examples enriches and clarifies the presentation; also tables are employed as illustrations of the analyzed issues and linguistic problems.

The scientific study of language as found in Chapter 4 is profound and complete as far as the processes of word-formation are concerned. From

the point of view of foreign language education, in general but in the case of English studies, in particular, this part of the examined book is of paramount importance both to the teacher and the student. This is so because of a great deficit often encountered in students' competence, concerning word-formation processes. No doubt that a thorough presentation of the above listed processes should contribute to a substantial deepening of students' knowledge and their understanding of word-formation in English. Very important and instructive is the final part of the chapter – **Multiple processes** – where the reader gets to know that, as the authors say, “...*there are some formations which appear to be a mixture of two or more word-formation processes...*” (p. 102).

With reference to the present revision of Chapter 4, it has to be underscored that the value of the explicit presentation is not only achieved by the abundance of examples pertaining to word-formation procedures but also by numerous references to the literature.

Productivity as a Quandary in Word-Formation is a final part of the examined publication. As the authors remark, “...*productivity still represents one of the most controversial issues in contemporary English word-formation both in terms of its scope and definition*” (p. 104). Hence, the main focus of the discussion is on the description and explanation of the productivity phenomenon, showing the course of word-formation and its results.

To make the discussion on productivity clear and comprehensible, the authors undertake a practical step and employ definitions from the literature. Analyzing various definitions, it appears that their core element, in the majority of the analyzed cases, is the term “frequency”. Therefore, the further part of the discussion is just concentrated on the explanation of the term, especially that frequency is often misidentified with productivity; this type of misunderstanding is in the further part described and explained, revealing other productivity related notions. In consequence, some approaches to word-formation productivity are quite deeply revised. Out of five revised approaches (Aronoff, Baayen, Plag, Bauer, Štekauer), a special attention is paid to the point of view represented by Mark Aronoff as an outstanding linguist in the word-formation productivity domain. The presentation of the approaches gives a clear image of this linguistic area and demonstrates discrepancies in researchers' points of view.

Although at the very beginning of the discussion on approaches to productivity the authors warn the reader that the presented “...*overview is far from being exhaustive... [as it is] inevitably selective*” (p. 107), the confronted points of view show how it is difficult to analyze the word-formation process,

and especially its part – productivity, due to its complex nature. However, it can be assumed that the main aim of the discussion designed for Chapter 5 has been attained.

With regard to the above presented sketchy revisions of each of the five chapters of the publication entitled **Selected Chapters in English Lexicology, Part II: Phraseology and Word-formation** by **Klaudia Bednarova-Gibova and Petra Jasenska**, it can be affirmed that the book is neatly designed as far as its structure and contents are considered. Once more, it is worth stressing that the enriching of the chapter material and the facilitation of its reception is obtained by the inclusion of those parts mentioned at the beginning of the present revision, that as **Questions and Tasks to Think About**, and **Glossary of Terms**. Nevertheless, the main value of the book lies in the study material itself and the way of its presentations, especially its language which is plain and digestible. Also, a proper selection of numerous examples which improve the presentation and facilitate the discussion are worth mentioning. Apart from examples, the use of references becomes a great asset as they serve students and teachers as indicators, pointing to resources for further studies.

Nevertheless, it is necessary to consider that the reviewed publication by Klaudia Bednarova-Gibova and Petra Jasenska is designated with the label – Part II. It means that the publication is a continuum of Part I, which is a book by Klaudia Bednarova-Gibova entitled **Selected Chapters in English Lexicology**, where **Part I** is dedicated to **Semantics and Lexicography**. Knowing this, we realize to what extent Part II becomes precious and useful material for the teaching/learning process of English. As a matter of fact, Part II elevates the discussion on English lexicology originated in Part I, yet on a higher level and demonstrates its complexity. Moreover, Part II not only expands the field of studies but it also makes it complete.

Taking into account all the above mentioned remarks and observations, it becomes evident that the revised publication should be recommended to academics as well as philology students as a source material to be used in the teaching/learning process focused on English lexicology. Additionally, it has to be made clear that the field of linguistics, especially English linguistics offered to philology students, yet in a foreign language, is a demanding area of studies, and aiding it with the publication like **Selected Chapters in English Lexicology, Part II: Phraseology and Word-formation**, by **Klaudia Bednarova-Gibova and Petra Jesenska** is of paramount importance. This importance is even doubled when we realize that students of English experience, in this case, the shortages of adequate

and handy materials (132 pages), directly concentrated on the subject matter. In this respect, the publication by **Klaudia Bednarova-Gibova** and **Petra Jesenska** deserves recommendation as a resource material which not only deepens the reader's knowledge in lexicology but also stimulates him or her to further research in this field.

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