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MOTIFS OF THE SHAKESPEAREAN CHARACTER IN CULTURAL CONTENT – COMPARISON OF *MACBETH*; *HAMLET*; *THE DEVIL’S ADVOCATE*

Abstract: The article presents Shakespeare's themes, which are still relevant today. The model of the Shakespearean tragic hero remains virtually unchanged. Shakespeare's works are reproduced in modern literary texts today, expanding the cultural context around the world. Many writers continue to use Shakespeare's prototypical tragic hero, paying homage to one of the world's greatest playwrights. Numerous films are made in which the spirit of Shakespeare is present, making its immortality known. *The Devil's Advocate* is one of them. Together with *Macbeth* and *Hamlet*, it represents a strong thematic, cultural and psychological relationship to Shakespeare's tragedy and contemporary cinema, thus addressing aspects of human nature. The analysis in the article is based on the coexistence of literature and other media, namely with the usage of intertextuality. Among the discussed aspects of a Shakespearean tragic hero there are: the character's mentality, his tragic flaw, morality and destiny.

Keywords: intertextuality, tragic hero, tragedy, cultural context.

Streszczenie: Niniejszy artykuł dotyczy tematyki szekspirowskiej, która jest wciąż aktualna. Sylwetka tragicznego bohatera szekspirowskiego pozostaje wciąż ta sama. Dzieła tego dramaturga pojawiają się we współczesnych tekstach literackich, wpływając na kulturowy kontekst na całym świecie. Wielu twórców wciąż wykorzystuje prototyp szekspirowskiego bohatera tragicznego, składając hołd jednemu z największych światowych dramaturgów. W licznych filmach można odnaleźć ducha Szekspira, co czyni go wciąż nieśmiertelnym. *Adwokat diabła* jest jednym z nich. Wspólnie z dziełami *Makbet* i *Hamlet* film reprezentuje silny tematyczny, kulturowy i psychologiczny związek z tragedią szekspirowską i współczesnym kinem, odnosi się zatem do aspektów ludzkiej natury. Analiza w niniejszym artykule opiera się na współistnieniu literatury i innych mediów,

mianowicie na wykorzystaniu intertekstualności. Wśród omawianych aspektów dotyczących tragicznego bohatera szekspirowskiego znajdują się; mentalność bohatera, jego tragizm, moralność i przeznaczenie.

Słowa kluczowe: intertekstualność, bohater tragiczny, tragedia, kontekst kulturowy.

Introduction

The reception of different motifs from well-known literary works in the modern culture is not a new phenomenon. Each time, however, while analysing the presence of classical protagonists in the modern works of art the echoes of the past sound differently and carry new meanings, taking into consideration personal experiences and cultural background of the receivers of a modern work. In the context of intertextuality, while analysing the elements of *Macbeth* and *Hamlet* in *The Devil's Advocate*, it is worth paying attention to the definition of intertextuality and its various types. One of the most relevant descriptions of the presence of older motifs in modern works is presented by Stanisław Stabryła. And although his definition refers mainly to the presence of ancient elements, it can perfectly fit the reception

of Shakespearean motifs in a film. Stabryła differentiates four types of the presence of ancient motifs in the modern works. These are revocation, reinterpretation, prefiguration and incrustation. Incrustation seems to be the least appropriate in the discussed context, as it mainly refers to the variety of ornaments used in poems, such as metaphors or allusions. Another type, revocation, although the most popular in the reception studies, here also seems not frequently used. It refers to the usage of the subjects and motifs but the change of meaning is not really essential. Both reinterpretation and prefiguration appear to be the most appropriate while seeking the echoes of Shakespearean characters in modern cinema. The former is connected with the change of the ancient motif, while the latter constitutes the system of analogies and references in the process of comparison the fates of the main characters and the structure of the world depicted¹. Another definition of intertextuality that seems to be perfect in the analysed context is the definition created by Gérard Genette. He distinguishes five types of intertextuality, or, transtextuality: intertextuality, paratext, metatext, hypertextuality and architextuality. Intertextuality means two texts coexisting together as a whole, paratext refers to the elements that are additional for the major text, like for instance title or illustrations, hypertextuality is the reference of one text to another, while the latter is created on the basis of the former, architextuality mainly refers to the taxonomy, for instance the usage of the words such as *Poems* or *Essays* as titles

¹ Stabryła S. (1980), *Antyk we współczesnej literaturze polskiej*. Kraków: Wydawnictwo PAN, pp. 8-9.

of the given works. The last type, metatext, which constitutes a critical commentary on a previous text², seems to be the most accurate in the context of this research.

In the above context, the article covers the features of a Shakespearean tragic hero that can be easily recognized in the film *The Devil's Advocate*.

Mentality and Nature

The examination of the psychological and emotional aspects of central characters provides critical insights into their tragic narratives. Along with the modern cinematic portrayal of Kevin Lomax in *The Devil's Advocate*, a deep exploration into their mental structure and emotional landscape reveals the intricate and complex nature of their tragic downfall.

Macbeth, a character initially known for his bravery and prowess in battle, gradually becomes trapped in the web he creates for himself, mainly because of the overwhelming ambition that consumes him from within. This ambition, far from being a mere desire for power, transforms into something that overshadows his initial courage, leading him into the depths of moral decline. The juxtaposition of his heroism on the battlefield and his subsequent moral decline paints a clear picture of a man caught up in an internal conflict in which his ambition becomes both his driving force and his greatest adversary.

A serious personal conflict deeply shapes Hamlet's actions in the play. He is a complex character, struggling with the heavy responsibility of revenge and its deeper meaning. Shakespeare shows that Hamlet is caught between his desire to take action and his tendency to overthink, making it difficult for him to make a decision. This inner conflict is a reflection of the common struggle people face when they are torn between what society expects of them and their values. His deep reflections make him doubt everything, from whether his actions are right to the very purpose of his life, highlighting the big questions about life, death and what is truly real.

In *The Devil's Advocate*, Kevin Lomax's character embodies the dangers of unchecked ambition. Although different in context from Shakespearean characters, Lomax's journey shares similarities with them, as he succumbs to the seductive temptation of success and power, despite conflicting with his moral and ethical principles. This journey showcases the perilous path taken when personal values are sacrificed for the sake of ambition. As Lomax spirals further from his moral compass and relationships, he demonstrates the consequences of pursuing success at the cost of honour and personal connections. In essence, *The Devil's Advocate* serves as a cautionary tale, reminding humans that ambition, when not tempered by moral considerations, can lead a human down an unfaithful and destructive path.

These characters are unique in many ways, yet they share similar psychological and emotional traits. They possess aspirations, engage in self-reflection, and

² Genette G. (2014), *Palimpsesty. Literatura drugiego stopnia*, translated by Tomasz Stróżyński and Aleksander Milecki. Gdańsk: słowo/ obraz terytoria, pp. 7-11.

confront ethical struggles that shape their lives. Thanks to the examination of their thoughts and actions, it is possible to gain insight into the complex human mind and the unfortunate consequences that can arise from inner disorder and desires. Researching these characters allows people to explore the mysterious collection of human emotion and motivation, revealing how our aspirations, ethical dilemmas, and the social structures in which humanity exists influence our behaviour. The cultural context of these heroes shows that regardless of the period, all people have different natures and mentalities and that they will always have to deal with struggles. This prefigurative reference clearly shows the analogies in the characters' mentality: both Hamlet, Macbeth and Lomax share the same aspirations, ambitions and specific moral rules.

The Evolution of Ambition and Power

The growth of ambition and the pursuit of power in *Macbeth*, *Hamlet* and *The Devil's Advocate* offers a profound insight into the interplay between human desires and ethical boundaries.

In *Macbeth*, ambition initially appears as a noble trait, fuelling his bravery in battle. Shakespeare captures this transformation with the line, *I have no spur / To prick the sides of my intent, but only / Vaulting ambition, which o'er-leaps itself / And falls on the other*³. However, this ambition soon changes into a destructive force, symbolized in Macbeth's lament, *Will all great Neptune's ocean wash this blood / Clean from my hand?*⁴, illustrating his initial moral decay. In Macbeth's case, it is, so to speak, a reverse evolution, a regression. A man of honour becomes, through his ambition for power, a fallen and corrupt man.

In *Hamlet*, ambition is more subdued but equally complex. His ambition is not for power in the traditional sense but rather a desire for moral and existential understanding, as well as for justice in avenging his father's death. It seems that the evolution of Hamlet's ambition is heading in the right direction, as the good son wants to take revenge for his father's death. However, the character's famous monologue speaks of a moral struggle as to whether to take action: *To be, or not to be: that is the question*⁵. Hamlet's ambition to reconcile the cause of avenging his father and staying true to his moral code makes the hero suffer and unable to make a decision. This form of ambition pushes Hamlet into a deep existential crisis, as he grapples with the moral implications of revenge and his role in a corrupt kingdom.

In *The Devil's Advocate*, Kevin Lomax's journey reflects this theme. His initial idealism gradually capitulates to the seductive allure of power, summarized in Milton's cynicism, *Free will. It's like butterfly wings. Once touched and it never*

³ Shakespeare W. (1993), *Macbeth*, In: William Shakespeare: The Complete Works. The Works: Essential Classics, p. 850.

⁴ Shakespeare W. (1993), *Macbeth*, In: William Shakespeare: The Complete Works. The Works: Essential Classics, p. 853.

⁵ Shakespeare W. (1993), *Macbeth*, *ibid.*, p. 886.

*gets off the ground*⁶. Kevin Lomax's ambition is shown to have both positive and negative consequences. At first, his drive brings him great success and a swift rise in his career as a lawyer. But as he gets more involved in the morally grey area to becoming negatively obsessed with it is similar to what happens to Macbeth and Hamlet, though it takes place in a modern environment.

These characters' experiences with ambition and power show up a timeless theme prevalent in both literature and real life: the perils of uncontrolled ambition and the moral dilemmas arising when power blinds ethical considerations. Macbeth's tragic life, marked by the realization that *I am in blood / Stepp'd in so far that, should I wade no more, / Returning were as tedious as go o'er*⁷, exemplifies this descent. Similarly, Hamlet's reflection, *Thus conscience does make cowards of us all*⁸, captures the ethical disorder bred by ambition. In *The Devil's Advocate*, Lomax's entanglement in power is rightly summarised in Milton's words, *Vanity, definitely my favorite sin*. These narratives can be altogether regarded as moralising issues and showing how initial ambition can rise to the size of a harsh force, leading to moral disorientation and, ultimately, to tragedy. For the sake of the cultural context, ambition and power are interdependent and altogether they can have destructive power if not uncontrollable.

The Duality of Human Nature

When discussing Shakespeare's characters Macbeth and Hamlet along with Kevin Lomax from *The Devil's Advocate*, it can be noticed how they embody the duality of human nature. Their inner struggle is caused by the conflict between their desires and the expectations of society. This conflict affects not only their actions but also their psyche, revealing a deep psychological complexity. It is important to note that this theme is not just a character trait, but a fundamental human condition that affects all people.

In Shakespeare's *Macbeth*, the theme of ambition is depicted in a dualistic manner. At first, Macbeth is portrayed as a courageous warrior. However, he undergoes a profound change, driven by his ambition, which is in direct contrast to the values of loyalty and honour. The witches' prophecy awakens his undeveloped ambition, leading to a series of actions that culminate in an ethical collapse, symbolized by the murder of Duncan. This act, motivated by the temptation of power, represents a significant deviation from his earlier noble qualities. Macbeth's internal struggle, encapsulated in his words, *I have no spur / To prick the sides of my intent, but only / Vaulting ambition, which o'er-leaps itself / And falls on the other*⁹ highlights the chaos that arises when personal ambition collides with societal expectations. This conflict underscores the exploration of ambition's corrupting potential when it overshadows moral constraints.

⁶ Hackford T. (1997). *The Devil's Advocate*, Warner Bros.

⁷ Shakespeare W. (1993), *Macbeth*, *ibid.*, p. 859.

⁸ Shakespeare W. (1993), *Macbeth*, *ibid.*, p. 886.

⁹ Shakespeare W. (1993), *Macbeth*, *ibid.*, p. 850.

The ethical struggles of Hamlet in Shakespeare's play reflect the conflict of Hamlet's dualistic nature between his desire for revenge and the societal standards of justice and morality. Hamlet's philosophical and reflective disposition creates difficulties in his decision-making. He is torn between the need to avenge his father's murder and to uphold his moral values. This internal struggle is a crucial aspect of his personality, driving the plot and highlighting the challenges of balancing personal ambition with social norms. Hamlet's dual nature stands at two extremes: to kill Claudius for plotting against his father or to remain true to his morals.

The Devil's Advocate presents a contemporary approach to this theme through the character of Kevin Lomax. Lomax, a highly ambitious lawyer, faces a conflict between his desire for professional success and the ethical standards of his profession. His ambition leads him to make choices that compromise his moral uprightness, reflecting the contemporary relevance of this duality. He begins to defend, for example, paedophiles and murderers at all costs. Lomax's journey demonstrates how personal ambition can clash with professional and ethical expectations, leading to significant moral consequences. This is a clear example of prefiguration – the change of the context together with the analogy to the characters of Macbeth and Hamlet.

In all three narratives, the duality of human nature is a critical theme that adds depth and complexity to the characters. It emphasises the internal struggles individuals face when trying to fulfil personal desires and societal expectations. This exploration of human nature's duality also provides a broader human experience, where the conflict between personal desires and societal norms is a recurring aspect of the human condition. Human nature is complex in its duality, often leading individuals to pursue multiple conflicting issues simultaneously.

The Role of Self-Reflection and Introspection

The role of self-reflection and introspection in the context of tragic characters such as Macbeth, Hamlet, and Kevin Lomax from *The Devil's Advocate* is a crucial part of understanding their internal struggles and decision-making processes. Introspection, in these narratives, is not just a passive activity but an active force that significantly influences the characters' journeys and the choices they make.

For Macbeth, introspection acts as both awareness and a harbinger of inner unrest. Particularly after Duncan's murder, his self-reflection amplifies his understanding of his moral failings. However, this same introspection triggers a descent into guilt and paranoia. This internal struggle is sadly captured in his hallucination, *Is this a dagger which I see before me, / The handle toward my hand?*¹⁰. This quote not only reflects Macbeth's growing mental distress but also highlights his realization of the significance of his actions, featuring the tragic impact of his choices on his psyche and moral compass. From Macbeth's self-reflection and introspection,

¹⁰ Shakespeare W. (1993), *Macbeth*, ibid., p. 851.

among other things in his hallucinations, it is clear that the character is remorseful for all the evil he has done.

In Hamlet's story, introspection plays a larger and more intricate role. His internal monologues are famous for their depth, offering insights into his deep existential and ethical dilemmas. Hamlet's reflective nature sheds light on his internal struggles, facing issues of morality, existence, and the essence of action. However, this introspection also hinders his decisiveness, greatly influencing the tragic development of the plot. His meditations, filled with philosophical considerations, present a character deeply absorbed in introspective thought, trying to balance his inner conflicts with external pressures. And here again comes Hamlet's famous monologue *To be or, not to be: that is the question*¹¹. It is his self-reflection about Hamlet's inability to make a constructive decision. *To be* means to take risks and act, while *not to be* would mean passivity and allowing the action to unfold without his participation.

In *The Devil's Advocate*, regarding the film's main plot, where pride reigns over the protagonist Kevin Lomax, there are contrasts with characters like Macbeth or Hamlet, primarily due to his lack of introspection. His ambition and desire for success blind him to the moral results of his actions. This point is shown in Milton's observation: *You sharpen the human appetite to the point where it can split atoms with its desire*¹². Lomax's failure to self-reflect leads to his downfall, illustrating the dangers of unchecked ambition. His character serves as a cautionary tale about the necessity of introspective thought in maintaining one's moral and ethical compass. On the other hand, at the end of the film, Kevin Lomax shows his self-reflection and introspection. At the end of the film, the viewer learns that the whole action did not happen and that it was Kevin's vision that he had gone against the code of a lawyer and chosen the path of pride. As Lomax's vision comes to an end, the film returns to the very beginning, so to the first court case. The protagonist experiences the epiphany that he cannot defend a paedophile because this could have tragic consequences, as in his vision. Self-reflection forces him to acknowledge the loss of the film's first court case and not to defend the accused at all costs.

The three narratives provide examples of how introspection significantly impacts the psychological landscapes of the characters. The presence or absence of introspection shapes their paths and leads to tragic outcomes. It reveals the complexity of the human psyche and highlights the importance of introspection in guiding moral and ethical dilemmas throughout life. Introspection can be a source of insight, but it can also cause inner conflict. A person doing wrong may or may not be inclined to introspection and self-reflection. If so, he will notice that he is going down the wrong path, but if not, he will sooner or later meet with punishment.

¹¹ Shakespeare W. (1993), *Hamlet*, In: William Shakespeare: The Complete Works. The Works: Essential Classics, p. 886.

¹² Hackford T. (1997). *The Devil's Advocate*, Warner Bros.

The Consequences of Moral Compromise

The theme of moral compromise in *Macbeth*, *Hamlet*, and *The Devil's Advocate* is a central element that profoundly impacts the characters' tragic narratives. This theme reveals the damaging effects of ethical compromises on their lives, relationships, and self-perception.

In *Macbeth*, the decision to murder King Duncan is the first in a series of moral compromises. This act sets Macbeth on a path of ethical degeneration, culminating in his isolation and downfall. His initial compromise, driven by ambition, becomes an unsteady ground, leading to further moral wrongdoings and eventually to his tragic end. In the case of Macbeth, one mistake entails a series of consequences. He begins with the murder of the king, followed by his madness and that of his wife Lady Macbeth and ends with Lady Macbeth's suicide and Macbeth's death. The end is the moral collapse of the marriage.

Hamlet's narrative is marked by hesitancy and morally ambiguous actions. His pursuit of revenge and his inability to act reflect his internal conflict and the consequences of his ethical values. Hamlet's struggle with these moral dilemmas highlights the complex nature of ethical decision-making, especially when personal desires conflict with moral responsibilities. The moral consequences for Hamlet are first and foremost his dilemma about his decision. He is driven by conflicting emotions; he wants to kill his father's murderer but also knows he should not do so. This is a great suffering for Hamlet's moral compass. The final consequence, even though he finally decides to murder the King, is that he dies.

In *The Devil's Advocate*, Kevin Lomax faces ethical concessions in his legal career. His choices, particularly in high-stakes legal cases, result in damaged relationships and a loss of self-identity and integrity. Lomax's story illustrates the gradual failure of moral principles in the face of ambition and success. Consequently, Lomax and also his wife Mary Ann become tragic heroes. His unhealthy ambitions led Kevin and Mary Ann to the point of tragedy. It could be said that his desires killed his wife and he lost his wife through lack of control. It is this same urge that causes Kevin to find out the truth about his family and pushes him to the hopeless option of suicide. Kevin prioritises success over family and loved ones.

These instances, where characters compromise their morals, illustrate how straying from ethical principles can lead to internal and external disasters, ultimately resulting in tragedy. This theme also emphasizes that individuals cannot avoid responsibility, and their wrongdoings will eventually lead to negative outcomes. To live in harmony with oneself and one's surroundings, a person must not renounce moral ethos and act contrary to it.

A Tragic Flaw

The concept of a tragic flaw, deeply rooted in classical tragedy, serves as a necessity in understanding the failure of characters such as Macbeth, Hamlet, and Kevin Lomax. This flaw, often referred to as *hamartia* in the realm of literary

criticism, is far more than a mere character weakness; it represents an important imperfection that precipitates the tragic hero's downfall.

In the case of Macbeth, his ambition, initially portrayed as an admirable trait, gradually transforms into a blinding force driving him towards his ruin. He comes across as a man of honour and a trusted man of King Duncan. He is also a friend of Banquo. Macbeth, along with Banquo, meets witches who issue a prophecy to both heroes. They say that Macbeth will become king of Scotland and thane of Cawdor, for Banquo is to be the father of kings. This rather incoherent prophecy awakens Macbeth's irrepressible thirst for power, which blinds him to the point where he goes from being a righteous man to murdering the king. He is also disturbed by the prophecy of Banquo, so he commissions the murder of Banquo and his son Fleance, but the latter avoids the assassination attempt. Macbeth utters words indicative of his tragic flaw which is ambition *To be thus is nothing, / But to be safely thus*¹³ signifying the fear of losing power because of Banquo's prophecy. Shakespeare masterfully depicts Macbeth's ambition as a double-edged sword, pushing him to greatness but at once to his demise.

Hamlet's inability to make decisions is a central part of his tragic character. Thus, Hamlet's tragic flaw is indecision. The hero hears from his father's ghost that he has been the victim of a conspiracy by the current King Claudius and wants his son to avenge him. Hamlet, however, is a man of honour with a good heart. On the one hand, he wants to fulfil his father's request; on the other, he does not want to act badly against the moral code. Hamlet's indecisiveness causes him much mental suffering. This indecisiveness is more than just hesitation; it is closely connected to his intellectual and philosophical nature. Hamlet's tendency to deeply consider moral and existential issues ironically becomes his biggest weakness. His habit of overthinking and his struggle to act quickly symbolize a more significant internal conflict, reflecting the complexities of the human experience. Hamlet's tragic flaw is a result of his deep understanding of the world, which, although intellectually enriching, leaves him unable to act decisively in situations that require it.

Kevin Lomax in *The Devil's Advocate*, though a character from a different era, shares this model of a tragic flaw with Macbeth and Hamlet. His tragic flaw is excessive pride, particularly in his legal competence and the unbroken streak of victories, which sets him on a destructive path with his own downfall. Lomax's tragic flaw, namely the desire to be invincible, leads him to renounce the moral ethics of a lawyer and also to a series of disasters for him and his loved ones, the death of his wife and himself. The portrayal of Lomax's pride speaks to the contemporary audience, highlighting the perils of overconfidence and the loss of ethical direction in the pursuit of personal glory. His flaw is a touching reminder of the dangers inherent in prioritizing success and recognition over moral and ethical considerations. In this case the reference to the tragic flaw of Macbeth and Hamlet

¹³ Shakespeare W. (1993), *Macbeth*, *ibid.*, pp. 855-856.

is presented in the form of revocation – the change of the motif is not visible here, only the context of various epoques is the difference.

In *Macbeth*, *Hamlet*, and *The Devil's Advocate*, the tragic flaws of the central characters are essential to their narratives. These flaws, deeply ingrained in their identities, crucially shape their stories. This self-analysis of human weaknesses, as explored by Shakespeare and mirrored in the character of Kevin Lomax, reveals a constant literary theme: the human tendency for error. This classic theme is common in modern storytelling and it provides insights into the human psyche. Moreover, the tragic flaw shows how attributes once considered strengths can change into destructive flaws.

The Impact of Ambition on Morality

In the tragic narratives of *Macbeth*, *Hamlet*, and *The Devil's Advocate*, ambition is highly important in shaping their moral struggles.

In Macbeth's case, his ambition for power leads him to morally catastrophic choices, as reflected in his words, *I am in blood / Stepp'd in so far that, should I wade no more, / Returning were as tedious as go o'er*¹⁴. Macbeth's statement here speaks of how his wild ambition has driven him so far in his intrigues and murders that there is no way back. It also captures the irreversible moral decline. Hence, Macbeth's ambition is fraught with irreversible consequences, through it he gains power, but he also renounces all moral and ethical principles through conspiracy and murders.

Similarly, in *Hamlet*, the prince's ambition for revenge thrusts him into a moral grey zone ending in tragedy. Hamlet has ambitions to vengeance his father but is also full of doubts about whether he will follow his own ethical and moral code. Ultimately, he chooses the path of ambition to fulfil his murdered father's request and takes revenge. Ambition and his father's wish win over Hamlet, and he finally fulfils them. He follows the path of iniquity which ends in his tragic death.

In *The Devil's Advocate*, Kevin Lomax's professional ambitions lead him to compromise his ethical principles, showcasing how personal ambitions can significantly impact moral decision-making and result in tragic consequences. The case of Kevin Lomax is identical. A good example describing how ambition affects Kevin Lomax's morality is his conversation with Milton:

John Milton: That day on the subway, what did I say to you? What were my words to you? Maybe it was your time to lose. You didn't think so.

Kevin Lomax: Lose? I don't lose! I win! I win! I'm a lawyer! That's my job, that's what I do!

John Milton: I rest my case. Vanity is definitely my favorite sin. Kevin, it's so basic, self-love; the all-natural opiate. You know, it's not that you didn't care

¹⁴ Shakespeare W. (1993), *Macbeth*, *ibid.*, p. 859.

for Mary Ann, Kevin. It's just that you were a little bit more involved with someone else: yourself¹⁵.

It is clear in the dialogue that Kevin's ambition has taken control of him. Milton is right about Kevin's narcissistic behaviour. Unsatisfied ambition leads him to renounce the principles of human morality and the professional ethics of a lawyer, which leads to a series of disasters such as defending in court individuals who are undoubtedly guilty, his wife's delusions, her suicide or Lomax's suicide. And again, this is the example of a revocation of Shakespearean motif of malignant ambition that leads to a disaster.

Ambition in the works influences the history of the characters and their decisions. It is the driving force leading to the doom of Macbeth, Hamlet and Kevin Lomax. They are wicked ambitions taking control of the protagonist and their lives. The cultural context shows that a man can go out of his way through his excessive ambition. This is disastrous for him, even though he initially seems to have everything under control. Human nature tends to follow excessive ambitions which leads to moral vacillation and evil acts.

The Role of Indecision and Doubt

Indecision and doubt play an important role in the narrative of *Macbeth*, *Hamlet* and *The Devil's Advocate*. The characters in these three works, however, differ in the degree of these traits.

In *Hamlet*, the theme of indecision and doubt is central to his tragic narrative. His hesitation is more than a personal flaw; it represents a complex psychological struggle between deep philosophical introspection and the motivation for decisive action. This internal conflict is exemplified in Hamlet's contemplation, *How all occasions do inform against me, / And spur my dull revenge!*¹⁶ or *To be, or not to be: that is the question*¹⁷. These quotes embody Hamlet's paralyzing indecision within moral and existential challenges. Furthermore, Hamlet's indecision makes him mad which is detrimental to his mental health. He begins to show mental exhaustion from reflecting. The doubts push him to behave in ways perceived as strange by others.

As for Macbeth, he shows uncertainty and doubt too, but to a lesser degree than Hamlet. Certainly, the difference between the two characters is that Hamlet's narrative is based for a long time on his indecision about whether or not to avenge his father, while Macbeth is indecisive in taking action only at the beginning. A key role is played by his wife, Lady Macbeth, who persuades Macbeth to overthrow the current king and seize power. Lady Macbeth utters these words *When you durst do it, then you were a man; and to be more than what you were, you would be so much*

¹⁵ Hackford T. (1997). *The Devil's Advocate*, Warner Bros.

¹⁶ Shakespeare W. (1993), *Hamlet*, *ibid.*, p. 896.

¹⁷ Shakespeare W. (1993), *Hamlet*, *ibid.*, p. 886.

*more the man*¹⁸. In this way, his wife questions her husband's manhood and pushes him to commit the crime.

Kevin Lomax from *The Devil's Advocate* also has a certain amount of doubt, more comparable to Macbeth than Hamlet. This is most evident when he defends the Gettys in a teenage girl's sexual abuse case. During the trial, Lomax sees what Gettys is doing, stroking his crotch and gesturing meaningfully under his desk. In a scene where there is a momentary pause in the trial, Kevin is in the bathroom and it is apparent that he has doubts about his duty to defend the accused. He is angry, washes his face with water and looks in the mirror. The second scene showing his doubts about defending the accused murderer of three people, Cullen, is the action on the train. Kevin finds Cullen guilty of the crime he committed and his secretary a liar. Kevin does not know what to do, whether to defend Cullen or waive his defence, he walks back and forth on the train and talks to Milton. This is another prefigurative reference to the Shakespearean characters: the world depicted is different, similarly to the degree of doubt presented by the figures.

Kevin Lomax, Macbeth and Hamlet have an inner conflict characterised by doubt and indecision. Hamlet, however, shows the greatest indecision, which allows him to be separated from Kevin Lomax and Macbeth in this matter. In the context of culture, these traits are normal human factors, putting a person in a difficult situation to take or refrain from taking action. Each person will have this degree of doubt and indecision, varying from situation to situation and from personality to personality. Although indecisiveness is a factor that every human being has within them, an excess of it, has a devastating effect on the human psyche. This element makes the person vulnerable to the words of others, helpless or mentally exhausted.

The Illusion of Control and Hubris

The main characters in *Macbeth*, *Hamlet* and *The Devil's Advocate* believe that their lives are under control, but this is only an illusion. Hamlet, Macbeth and Kevin Lomax lose this control and this leads to their downfall. They are also marked by hubris.

In *Macbeth*, the false belief in control and excessive pride are significant themes. Macbeth's overconfidence and illusion of power over his fate are captured in his words, *I will not be afraid of death and bane, / Till Birnam forest come to Dunsinane*¹⁹. This demonstrates his hubristic belief that he can control his destiny and outsmart the witches' prophecies, leading to his ultimate downfall. His arrogance blinds him to the potential consequences of his actions, showcasing the dangers of misconceived self-determination and the tragic outcomes it can yield. Macbeth can only have the impression that he is in control and will have control over everything and himself. In reality, this is not the case, however, for after the murder

¹⁸ Shakespeare W. (1993), *Macbeth*, ibid., p. 851.

¹⁹ Shakespeare W. (1993), *Macbeth*, ibid., p. 867.

of King Duncan he begins to lose control of himself and descends into madness. He begins to fear that the conspiracy will be discovered and that the truth will come out.

In *Hamlet's* narrative, his struggle with roles and duties leads to a distorted sense of control. This is reflected in his expression, *The readiness is all*²⁰, indicating his acceptance of fate's unpredictability, yet still highlighting his initial overconfidence. In the case of Hamlet, it is difficult to speak of a strong sense of control. On the one hand, Hamlet seems to have a strong sense of control over his thoughts and emotions, especially in the context of philosophical reflection and analysis of the situation. His monologues show his capacity for reflection and intellectual control, making him appear to be aware of his decisions. On the other hand, however, Hamlet is also entangled in complex family and political relationships, leading to conflict and difficulty in maintaining control over external situations. Political manipulation, betrayal and uncertainty about his father's truth make Hamlet lose his certainty about reality and find it difficult to maintain control over what is happening around him. The final act of the tragedy shows that Hamlet's sense of control is illusory when his fate and decisions are largely determined by external forces. In addition, in some cases, he is driven by hubris and a belief in his superiority. In Hamlet's conversation with Horatio, the hubris of the main character is evident. The conversation is about the duel with Laertes:

Horatio: You will lose this wager, my lord.

Hamlet: I do not think so. Since he went into France, I have been in continual practice. I shall win at the odds. But thou wouldest not think how ill all's here about my heart – but it is no matter²¹.

Hamlet's confidence in his abilities is evident in this dialogue. Hamlet's hubris tells him that he will win the duel with Laertes.

In *The Devil's Advocate*, the revocative character of the motif shows that Kevin Lomax's overestimation of his legal and moral judgement similarly blinds him to the implications of his choices. At the beginning of *The Devil's Advocate*, Kevin Lomax actually has control over his life. He has a great job and is good at it, a loving wife and mother. However, when he starts working for Milton, this control over his life Kevin loses. He begins to be put to the test by Milton, undermining his ethical and moral principles. Control over his life begins to be taken for granted by Kevin's hubris, leading to the downfall of the protagonist and his loved ones. On the surface, it may seem that Milton, as Satan, is in control of Kevin but this is not quite true. In a conversation in Milton's office, Milton explains to Kevin that he is supposed to be in control of his life and that he has free will. Milton's conversation with Kevin calls for reflection:

Milton: What did I say to you? What were my words to you? Maybe it was time to lose. You didn't think so.

²⁰ Shakespeare W. (1993), *Hamlet*, *ibid.*, p. 905.

²¹ Shakespeare W. (1993), *Hamlet*, *ibid.*, p. 905.

Kevin: Lose?! I don't lose, I win! I win! I'm a lawyer, that's my job, that's what I do!

Milton: I rest my case²².

This dialogue shows that, however, Kevin had control and the right to choose but probably did not realise them through blinding hubris.

All characters are typified by hubris and an illusory sense of control over reality or emotions. Given the broad cultural context, this is a common phenomenon. Human nature is such that a person can have so much pride and self-confidence that he or she thinks that every situation is under control, without realising this illusion.

The Downfall of the Tragic Hero

The downfall of the tragic hero is a common feature in understanding who the tragic hero is. He is vibrantly portrayed in *Macbeth*, *Hamlet*, and *The Devil's Advocate*. This downfall, far from being a mere plot device, emerges as an inevitable consequence of the protagonist's inherent tragic flaws. Each narrative represents the journey from the hero's peak of greatness to their ultimate failure, emphasizing the inextricable link between character flaws and destiny. These stories not only depict the tragic end of the protagonists but also serve as warning tales about the moral and thematic importance of personal flaws and their unrestricted growth, which invariably lead to profound and irreversible consequences.

In *Macbeth*, the tragic flaw of uncontrolled ambition is central to the protagonist's downfall. Macbeth, a character initially portrayed with valour and ambition, gives up to the lure of power and greatness, as prophesied by the witches. His ambition, while initially a positive trait, gradually transforms into a destructive force. This ambition sets him on a path of moral degeneration, leading to acts of betrayal, murder, and tyranny. Macbeth's final downfall is his tragic death at the hands of Macduff. Macbeth, a respectable man goes from the path of goodness and righteousness to the complete opposite. Lady Macbeth's life comes to a tragic end as she commits suicide. *Macbeth* illustrates how this once-valiant hero becomes consumed by his ambition, resulting in his tragic downfall. Macbeth's story is an upsetting reminder of how a singular, overpowering flaw if not controlled or countered, can lead to one's self-destruction.

Hamlet's tragic downfall, on the other hand, is rooted in his indecisiveness and deep internal conflict. Unlike Macbeth, Hamlet's flaw is not an overabundance of ambition, but rather his philosophical and moral contemplation, which leads to paralyzing indecision. His struggle to reconcile his moral values with the need for decisive action in avenging his father's murder creates a profound internal conflict. This conflict, while showcasing his depth of character and intellect, ultimately becomes his undoing. Hamlet's inability to act decisively, despite his understanding of the moral implications of his situation, leads to a series of tragic consequences.

²² Hackford T. (1997). *The Devil's Advocate*, Warner Bros.

His story highlights the danger of excessive introspection and indecision, especially when decisive action is required. Hamlet's fall also ends in death. Hamlet dies in a duel with Laertes from a poisoned sword.

In *The Devil's Advocate*, Kevin Lomax's tragic fall is intricately linked to his hubris and moral compromises. As an ambitious lawyer, Lomax becomes increasingly blinded by his quest for success, ignoring ethical limits. Kevin Lomax, or rather his vision, ends his tragic journey similarly, he dies. Unlike Hamlet and Macbeth, however, Lomax commits suicide to deceive Milton who wants the child-antichrist conceived by Kevin and his sister Christabelle. His story exemplifies the tragic hero archetype in a contemporary setting, underlining the risks of unbridled ambition and ethical laxity in personal and professional endeavours. The difference lying in the characters' fates in the case of the film exemplifies the reinterpretation of the motif: the tragic hero is not killed by kills himself.

These narratives collectively illustrate the unstoppable link between character flaws and destiny. Speaking of the cultural context, they explore the moral and thematic importance of personal flaws, showing how these flaws lead to tragic outcomes. The stories of Macbeth, Hamlet and Kevin Lomax serve as timeless reminders of the profound impact that integral flaws can have on an individual's life and destiny. They stress the complexity of the human condition, where the very traits that elevate a character to greatness can also lead to their ultimate downfall. The characters of Macbeth, Hamlet and Kevin Lomax all share the common factor of a tragic death and relate to a cultural context. Their actions, mistakes or ambitions ending in their downfall reflect the human tendency to err and it shows that a man is responsible for what drives him to act and for the eventual consequences.

The Road of No Return

The concept of *the road of no return* plays a crucial part in the tragic storylines of *Macbeth*, *Hamlet*, and *The Devil's Advocate*, marking a key turn in their paths towards tragedy. This point of no return is not only a tool for storytelling but a significant moment of transition. The characters' decisions create this road of no return and it serves as an irreversible change that transforms the destiny of a protagonist. The tragic flaws of the protagonists, through which they make choices and close the path of return, also play an important role in this aspect.

In *Macbeth*, the act of regicide is the definitive turning point for Macbeth, signifying his complete immersion into moral corruption and the start of his descent into madness and tyranny. What drives Macbeth to make an irreversible decision is his tragic flaw and that is greed. This moment is emblematic of the irreversible nature of certain choices, where the act of crossing moral boundaries sets forth a chain of events that cannot be undone. Macbeth already has no way out of the situation he finds himself in. Macbeth murders King Duncan so this automatically closes his path back to righteousness and makes him a murderer. He thereby makes it impossible for him to escape the witches' prophecy and further terrible transgressions put him further and further away from returning to the right path.

Similarly, in *Hamlet*, Polonius' death represents an important moment in Hamlet's story. Hamlet's tragic flaws – his desire for revenge and indecision – create a scenario of a road of no return. Above all, it is his desire for revenge that closes this path for him when he mistakenly kills Polonius. This act also born from confusion and impulsiveness, determines his fate and sets off the fatal events that follow. This irreversible act makes Hamlet a murderer, which has further consequences throughout the tragedy, such as the probable suicide of Ophelia, the deaths of Hamlet and Laertes as well as Hamlet's mother, and the fulfilment of Hamlet's father's will and thus the murder of Claudius. It signifies a shift from thought to action, although incorrect, emphasising the long-term consequences of rash and unconsidered acts.

In the modern narrative of *The Devil's Advocate*, Kevin Lomax's ethical compromises in pursuit of legal victory represent his road of no return. These compromises, initially subtle, gradually escalate, leading him down a path from which he cannot return. Kevin's breakthrough and closing moments on his way back to proper lawyer ethics are his defence of Gettys and acceptance of an offer to work for Milton. His ethical transgressions, driven by ambition and a desire to succeed at all costs, become the defining moments that mark his transition from a moral individual to one who is willing to sacrifice his principles for personal gain. These moments underscore the theme that certain choices, once made, set forth an unstoppable trajectory towards tragedy. It also emphasises the significance of ethical decision-making in shaping one's destiny. On the other hand, however, like any human being, Kevin has free will. He can always decide on his own, not acting under anyone's influence, and he can always back out of a decision he has made. Such a scenario even takes place when his vision ends and there is a return to the beginning of the film. Lomax decides to back down from defending Gettys, he wants to return to the moral path. Nevertheless, right after the trial he gets an offer, as it turns out from Milton undercover, to give an interview about what he did, and thus about the moral decision of the lawyer. And here the definitive factor in favour of making an irreversible decision is the tragic flaw of the protagonist.

In all three narratives, the concept of a road of no return serves as significant acts that conceptualise the themes of moral integrity, the consequences of ambition, and the irreversible nature of certain actions. These are profound reflections on the human condition, offering insights into moral choices and tragic outcomes of flawed decision-making. This concept also shows that man himself can choose the path he wishes to follow and, regardless of the outcome, he is responsible for it. The way it is portrayed in the film is a prefigurative reference, closely linked to the Shakespearean tragedies.

The Psychological Impact of Irreversible Decisions

The irreversible choices made by characters like Macbeth, Hamlet, and Kevin Lomax in *The Devil's Advocate* have a deep psychological impact, drastically affecting their mental states and self-awareness. Their stories and personalities show

what harmful social factors can result from such decisions and how the human psyche can suffer.

For Macbeth, choosing to commit regicide is not only a moral collapse but also the beginning of paranoia and insanity. Every decision he makes is irreversible and tragic for his mental health. Above all, Macbeth begins to hallucinate and have terrible visions. The first hallucination taking place even before he kills Duncan is the dagger. This hallucination shows that Macbeth's psyche is in an unhealthy state and that he wants to kill the king. Macbeth's other hallucination is the ghost of the murdered Banquo. During the feast, only Macbeth can see him which shows his deepening paranoia. What's more, his irreversible decisions also affect his wife Lady Macbeth, who also begins to manifest madness. She also begins to have hallucinations manifested by sleepwalking. Some of the most important Lady Macbeth quotes are *Here's the smell of the blood still*²³ and *The Thane of Fife had a wife; where is she now? What, will these hands ne'er be clean?*²⁴. Both of these quotes show how bad a mental state Lady Macbeth is in; she is hallucinating about her husband's murders. She sees and smells blood.

Hamlet's decision to pretend to be mad is a significant factor in the events of the play. It impacts his relationships with others and has a psychological effect on his mind. While it allows him to gather information and plot his revenge, it also strains his relationships with loved ones and ultimately contributes to Ophelia's tragic fate. Hamlet's madness has a profound impact on the events that followed. The irreversible act with a profound impact on Hamlet's psyche and whole surroundings is also the killing of Polonius. He mistakenly kills Polonius when he is hidden behind a curtain. This irreversible act of taking someone's life deepens Hamlet's paranoia and internal conflict. His sense of alienation also intensifies. Following the murder of Ophelia's father, Hamlet's outsider status becomes more entrenched, and an increasing number of individuals in his surroundings begin to experience fear and suspicion. It is evident that Hamlet struggles to bear the burden placed upon his shoulders independently. Shortly after killing Polonius, Hamlet utters the following words to his mother: *A bloody deed! Almost as bad, good mother, As kill a king and marry with his brother*²⁵. These words not only betray him but also allude to the breaking point of his mental endurance.

It might seem that Kevin Lomax from the film *The Devil's Advocate* has no control over his actions, including those that are irreversible, and that his life is dictated by Milton. However, the ultimate agency lies with Kevin; what he does will have consequences. The irreversible decision made by Kevin to defend Gettys has a psychological impact on him and further situations. Despite suspecting Gettys of sexual harassment, Kevin chooses to defend him in court. This irreversibly committed act serves as the genesis of the entire film's narrative. Lomax eventually

²³ Shakespeare W. (1993), *Macbeth*, *ibid.*, p. 866.

²⁴ Shakespeare W. (1993), *Macbeth*, *ibid.*, p. 866.

²⁵ Shakespeare W. (1993), *Hamlet*, *ibid.*, p. 892.

catches the attention of Milton's firm, leading to his acceptance into the company. This, in turn, initiates further moral and psychological complications, ranging from the abandonment of ethical principles to the eventual suicides of Kevin and his wife.

The irreversible decisions in *Hamlet*, *Macbeth*, and *The Devil's Advocate* demonstrate that every action a person undertakes has a psychological or socio-moral impact. These decisions made by individuals can harm mental well-being, one's overall sense of self, personality, and the principles by which they are guided. It is a common phenomenon in culture that when a person does something that cannot be fixed or changed, harmful implications begin to emerge.

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DIFFERENT IMAGES OF LOVE IN THE PROSE OF EMILY BRONTË AND THOMAS HARDY AND ITS CONTEMPORARY REPRESENTATIONS

Abstract: The article presents various types of love in the Victorian era, portrayed in the novels written by Emily Brontë and Thomas Hardy, as well as their representations in the contemporary culture, among others: TV adaptations and a song. The reception of this popular nineteenth-century theme is presented by the usage of intertextual and intermedial references: literature versus film and literature versus music, and in the context of the reception studies. The authors discuss such aspects as: both tragic and happy love. The representation of these aspects in modern culture enables the readers to notice the universal value of literary works, as well as the possibilities for further academic research.

Keywords: Victorian era, intertextuality and intermediality, love.

Streszczenie: Artykuł prezentuje różne rodzaje miłości w epoce wiktoriańskiej, ukazane w powieściach Emily Brontë i Thomasa Hardy'ego, jak również ich wyobrażenia we współczesnej kulturze, m. in. w adaptacjach filmowych i muzyce. Recepcja tego popularnego dziewiętnastowiecznego tematu jest tu przedstawiona poprzez wykorzystanie odniesień intertekstualnych i intermedialnych: literatura vs film i literatura vs muzyka, oraz w kontekście pojęcia recepcji. Autorki omawiają takie zagadnienia jak: miłość, zarówno tragiczna jak i szczęśliwa. Obecność tych aspektów we współczesnej kulturze pozwala czytelnikom zauważyć uniwersalne wartości dzieł literackich, jak również możliwości do dalszych badań naukowych.

Słowa kluczowe: epoka wiktoriańska, intertekstualność i intermedialność, miłość.

Introduction

Although the theme of love seems to be thoroughly analysed in various academic research, it is worth looking at it from the perspective of a contemporary reader and

an addressee of modern culture. Another aspect of perceiving the value of classical British novels in terms of the image of love might be their analysis with the usage of intermediality. It is clear that the presence of British nineteenth-century novels in contemporary culture is the effect of their universal value, that is why the study of reception can be employed here to create new meanings of old literature.

One of the popular ways of literary interpretation is Reader-Response Criticism, according to which the new meaning of an old work of art is created on the basis of a reader's experience each time he or she approaches the literary work. The meeting of a reader and the text means creating new meanings and makes the text become alive (Batstone 2006: 17). And this constitutes the point of reception. In the following paper the process of reception is portrayed as the passage between different media: a literary work and a film and music. This relationship is called intermediality – the coexistence of a literary work within other media. The analysis covers the two famous British novels: *Wuthering Heights* by Emily Brontë and *Tess of the d'Urbervilles* by Thomas Hardy, and their major themes: love and social relationships.

As far as intermediality is concerned, it should be pointed out that it differs from intertextuality in the context of different media. While intertextuality means mostly the coexistence of two or more texts within one major text¹, intermediality refers to the coexistence of a literary work and e.g. film or song. As Konrad Chmielecki states, there exist various relationships between words and images (2017: 224).

Different images of love

Before analysing the presence of the literary motifs in modern media it is worth mentioning how both Hardy and Brontë depicted different types of love. This subject is one of the most popular subjects in social novels. The nature of love is multifaceted there. The importance of material issues was the reason why affection often had to recede into the background. Marriages were more of an arrangement between two families for financial gain than the fruit of love and passion.

¹ According to Gerard Genette, intertextuality can be divided into 5 subgroups: intertextuality, paratext, metatext, hypertextuality and architextuality (Genette 2014, 7-11). Ryszard Nycz, on the other hand, distinguishes between 3 types of intertextual references: text versus text, text versus literary genre and text versus reality (1995, 65). Stanisław Stabryła, on the other hand, analysing the ancient reception, notices that the usage of the motifs can be in a form of: revocation (repetition of the motif with no essential change of meaning), reinterpretation (change of the sense of the source material or creating a new meaning), prefiguration (analogies that can be recognised in two compared works) and incrustation (using stylistic figures to enrich the language of the work that uses the ancient motif) (1996, 8-9).

Fortunate love

The theme of love was a complex issue in the times of Emily Brontë and Thomas Hardy, often dependent on a variety of factors, mainly social, economic, and cultural ones. Certain social norms imposed expectations on marriage. Many people chose to get married for economic reasons, to strengthen their social position or secure their family's inheritance. However, despite various adversities and difficulties, fortunate love did happen in those days. In Thomas Hardy's novel titled *Tess of the d'Urbervilles*, this kind of love is perfectly illustrated by the relationship between Tess and Angel, especially in the period before their marriage, during the idyllic moments spent at the Talbothays dairy.

The infatuation between them appeared at the moment of their first meeting. It happened in the village of Marlott, where Tess grew up, during the May-Day dance that Tess participated in as a member of the women's club (T. Hardy 1988, p. 19). As the villagers began to celebrate after the procession, the three brothers watched the dancing girls and women. During the Whitsun holidays, they went on an excursion through the Vale of Blackmoor. One of the brothers, Angel, fascinated by the sight of waving white festive gowns, decided to wander off from his brothers, at least for a short while, and dance with the ladies. Although he did not choose Tess to dance with, they both drew each other's attention (T. Hardy 1988, pp. 22-23):

As he fell out of the dance his eyes lighted on Tess Durbeyfield, whose own large orbs wore, to tell the truth, the faintest aspect of reproach that he had not chosen her. He too was sorry then that, owing to her backwardness, he had not observed her; and with that in his mind he left the pasture. [...]

Trifling as the matter was, he yet instinctively felt that she was hurt by his oversight. He wished that he had asked her; he wished that he had inquired her name. She was so modest, so expressive, she had looked so soft in her thin white gown that he felt he had acted stupidly (T. Hardy 1988, pp. 23-24).

That first meeting certainly imprinted on their memories, as both confirmed at the Talbothays dairy, where they met again after a long time. Tess and Angel became enchanted with each other all over again. She was enthralled by his harp playing. He, on the other hand, appreciated her rare intelligence, which distinguished her from other women. Moreover, he was intrigued that such a young girl, with such delicate beauty, already knew so much about life and expressed herself so deeply about it (T. Hardy 1988, p. 140). And so they slowly began to get to know each other more and more, and affection began to grow between them.

They were constantly seeking their company, *they could not help it. They met daily in that strange and solemn interval, the twilight of the morning; [...] Being so often – possibly not always by chance – the first two persons to get up at the dairy-house, they seemed to themselves the first persons up of all the world* (T. Hardy 1988, pp. 144-145). As Clare claimed, it was at such moments, during the midsummer dawns, that Tess impressed him the most (T. Hardy 1988, p. 146).

Dawn, traditionally associated with purity and new beginnings, served as a background for Tess's natural beauty and simplicity. It was her innocence that drew his attention. This very quickly turned into a blossoming feeling of love between them.

There was no concealing from herself the fact that she loved Angel Clare [...]. (T. Hardy 1988, p. 161)

Although the two lovers came from two different social classes, as she was part of the working class and he belonged to the higher social class, neither of them seemed to consider this an obstacle. For Clare in particular, it was not Tess's background that mattered, but his future as a farmer with his beloved milkmaid at his side, and the feeling that erupted with volcanic force between him and Tess, a feeling he had never experienced before (T. Hardy 1988, p. 171).

The beauty of Angel and Tess's relationship relied upon genuine affection, oblivious to any barriers, social norms, and expectations. When Tess's doubts about marrying Angel, caused by her past and the mark that Alec d'Urberville had left on her purity and innocence, disappeared, Tess felt a pervasive happiness. She *had never in her recent life been so happy as she was now* (T. Hardy 1988, p. 144). Almost constantly there could be heard *the laugh of a woman in company with the man she loves and has won from all other women* (T. Hardy 1988, p. 213). Tess Durbeyfield's feelings for Angel Clare were characterised by a deep sense of joy and contentment. This affection and the moments spent with Angel at the Talbothays dairy formed the best part of the young woman's life. During all these months, Tess was delighted by the interest, care, and tenderness that Clare brought into her life.

In Emily Brontë's novel titled *Wuthering Heights*, the relationship that illustrates fortunate love is that of Catherine and Heathcliff. The stage in their lives that was characterised by the deepest affection was also the time of their youth, as in the case of Tess and Angel, the years they spent together before Cathy decided to marry Edgar. Unfortunately, they did not have as much freedom and moments during which they could enjoy only themselves. As Heathcliff, a Gypsy boy who probably came from a lower social class, ended up in the Earnshaw family as a homeless child and with a distinctive, different appearance, he was received very negatively by Mr. Earnshaw's children and wife. Although Miss Cathy quickly befriended the boy, Hindley harboured a grudge against him. As soon as Mr. Earnshaw died, Hindley's mistreatment of Heathcliff intensified. His sister also suffered the punishments meted out by the tyrannical master of the house. Joseph was reminded *to order Heathcliff a flogging, and Catherine a fast from dinner or supper* (E. Brontë 1995, p. 40).

Nevertheless, their attachment to each other was incredibly strong. It was so intense that despite making various attempts, the two could not be separated.

[...] it was one of their chief amusements to run away to the moors in the morning and remain there all day, and the after punishment grew a mere thing to laugh at. The curate might set as many chapters as he pleased for Catherine to get

by heart, and Joseph might thrash Heathcliff till his arm ached; they forgot everything the minute they were together again [...] (E. Brontë 1995, p. 40).

Catherine and Heathcliff were very fond of each other, and the worst punishment that could be devised for them was to separate them. Although even that was not so easy.

Catherine [...] went up in the dark: I followed. They shut the house door below, never noting our absence, it was so full of people. She made no stay at the stairs' head, but mounted farther, to the garret where Heathcliff was confined, and called him. [...]

I let the poor things converse unmolested, till I supposed the songs were going to cease, and the singers to get some refreshment: then, I clambered up the ladder to warn her.

Instead of finding her outside, I heard her voice within. The little monkey had crept by the skylight of one garret, along the roof, into the skylight of the other, and it was with the utmost difficulty I could coax her out again.

When she did come, Heathcliff came with her; [...]. (E. Brontë 1995, p. 53)

This was the most wonderful aspect of their affection and attachment. They were so close, so infatuated with each other that they wanted to spend every second together. The strength of their love destroyed any obstacles others put in their way. Moreover, they felt this affection for each other during their childhood, when they did not yet have the serious problems of adult people, and life seemed so simple, which is why this feeling was so strong and passionate. From their earliest years, Heathcliff and Cathy shared common experiences and difficulties, which built a unique bond between them. Certainly, their relationship was even more than attachment and love. It was more of a deep soul connection, and their mutual dependence was another of the most beautiful features of this affection. Not only did Heathcliff repeatedly call Catherine his soul, but she considered them as one (E. Brontë 1995, pp. 72-73).

"[...] my great thought in living is himself. If all else perished, and *he* remained, I should still continue to be; and, if all else remained, and he were annihilated, the Universe would turn to a mighty stranger. I should not seem a part of it. [...] my love for Heathcliff resembles the eternal rocks beneath – a source of little visible delight, but necessary. Nelly, I *am* Heathcliff – he's always, always in my mind – not as a pleasure, any more than I am always a pleasure to myself – but, as my own being [...]" (E. Brontë 1995, p. 73)

Although, due to his difficult and unpleasant past, he was more secretive and unable to show his feelings in the traditional way, he loved her just as deeply and sincerely. However, he did show her how much she meant to him, for instance, by making attempts to learn how to read and write, to be neat and tidy, even if it was against his nature (E. Brontë 1995, p. 60). Catherine and Heathcliff, in the shared moments of their youth, rooted their love full of boundless fascination,

understanding, and spontaneity, and every look or touch had the magical power to awaken feelings that became one of the most beautiful experiences of their lives. Every moment spent together on the moors symbolised their powerful and unique bond.

The fortunate love of Tess and Angel as well as the affection of Catherine and Heathcliff shared many similarities. The feelings of both couples blossomed during the period of innocent youth. It was a time when the moments spent together were not yet burdened by the difficulties of adult life. It was the years of youth that characterised the sincerity, passion, and spontaneity in their relationships. Both Tess and Cathy shared idyllic moments, memories, and experiences with the person they fell in love with, thus laying a strong foundation for the later development of their feelings. Angel and Heathcliff were characterised by deep and fierce love, full of passion. The relationship of the main characters in both novels *Tess of the d'Urbervilles* and *Wuthering Heights* was also marked by the simplicity of their moments spent together, whether at the dairy or on the moors, their willingness to spend every minute of the day with each other, and their mutual complementarity. Cathy and Heathcliff were like one soul. She gave herself completely to her beloved, just as Tess did. As she caught Clare's *manner and habits, his speech and phrases, his likings and his aversions*, it could be said that she would be nothing without him (T. Hardy 1988, p. 222). Furthermore, the beautiful aspect of both relationships was that they were not concerned about the social classes to which they belonged. Their way of thinking was not traditional to Victorian society. In their beloved, they did not perceive great wealth, the material benefits of getting married, or the lack thereof. The only thing that mattered to the lovers was spending as many carefree and joyful moments together as possible. So romantic and fortunate was the love of Tess and Angel, as well as Catherine and Heathcliff from these periods in their lives.

Tragic love

However, Angel and Tess's happiness also faded very quickly and transformed into the tragic relationship. Their fate was accurately described by the words of Friar Laurence quoted by Tess which read "*these violent delights have violent ends*," and this is exactly the path their relationship followed (T. Hardy 1988, p. 233). Even before their marriage, numerous factors slowly led to the development of a tragic love between them. As deep affection blossomed in their hearts, Tess, with her appearance, maturity, and intelligence that distinguished her from the rest of the milkmaids, *perceived that only the slightest ordinary care was necessary for holding her own in Angel Clare's heart against these her candid friends* (T. Hardy 1988, p. 152). Nevertheless, she wondered whether she should do so and let Angel continue to nurture the feeling of sincere and beautiful love between them (T. Hardy 1988, p. 152). Perhaps if she had effaced herself, given the other maidens a chance, and let him choose one of them, a period of tragic love would not have happened in their lives.

The first ill-omen appeared at the moment when Tess accepted the proposal and decision to get married, when Angel recalled that he had already met Tess

in the village of Marlott, but unfortunately did not dance with her. She became concerned that this could signify an impending misfortune for them (T. Hardy 1988, p. 209), especially due to the fact that Tess believed in Malthus's theory that the poor are guilty of their fate. This awakened her urge to confess the truth about her past to Angel. Full of despair, *she resolved with a bursting heart to tell all her history to Angel Clare, [...] to let him for whom she lived and breathed despise her if he would [...]* (T. Hardy 1988, p. 218). When a written confession of the terrible truth failed as Angel did not read the letter, she longed to talk to him whenever the opportunity arose (T. Hardy 1988, p. 228-230). Unfortunately, excited about his wedding day, Clare did not want to hear about any faults or blunders, and this attempt was also dissipated (T. Hardy 1988, p. 230).

Angel Clare's distressed and remorseful wife wondered if she had done the right thing by binding their fates forever.

She was Mrs Angel Clare, indeed; but had she any moral right to the name?
Was she not more truly Mrs Alexander d'Urberville? (T. Hardy 1988, p. 233)

However, it was now too late for such considerations, and the moment had arrived when the newlyweds were to start a new life together, away from Talbothays where they had shared so many idyllic days. Before the lovers left the dairy, there was a moment of silence, which was immediately broken by the crowing of the cockerel, and this constituted another bad omen (T. Hardy 1988, p. 234). It was believed that when the cock crowed three times in the afternoon, it would bring misfortune. And indeed, after all the bad signs in Angel and Tess's lives, a time of tragic events began.

As soon as Tess found out what a terrible state Marian, Izz, and Retty were in after they left the dairy, she firmly decided to expose herself completely to Clare (T. Hardy 1988, p. 241). Angel's confession about being seduced by one woman while in London gave Tess courage. She thought her story was very similar and her beloved would forgive her. Without hesitation she began to speak (T. Hardy 1988, pp. 242-244).

When she ceased the auricular impressions from their previous endearments seemed to hustle away into the corners of their brains, repeating themselves as echoes from a time of supremely purblind foolishness. (T. Hardy 1988, p. 247)

It was at this point that a tragic love began between them. The meaning of his life crumbled into millions of pieces to such an extent that, despite her apologies and pleas for forgiveness, Tess was, at that moment, a completely different person to him than the one he had fallen in love with. His passionate feeling was extinguished in just a few minutes.

“O Tess, forgiveness does not apply to the case. You were one person: now you are another. [...]”

“[...] how can you, O my own husband, stop loving me?”

“I repeat, the woman I have been loving is not you.”

“But who?”

“Another woman in your shape.” (T. Hardy 1988, pp. 248-249)

The couple were, in truth, just the ashes of their former fiery and passionate love. A fever of despair was followed by a dull gloom and it seemed that nothing could kindle their sensitivity and fierce affection any more (T. Hardy 1988, p. 257). While she thought he loved her for who she truly was, her personality, her flawless beauty, and that her past did not matter to him, he *looked upon her as a species of impostor; a guilty woman in the guise of an innocent one* (T. Hardy 1988, p. 249).

When an honest man becomes convinced that he has been deceived, extraordinary cruelty often awakens in him. Hence such anger grew in Clare at the time (T. Hardy 1988, p. 251). Tess knew that Angel saw her in all her glory, and Time chanted his satirical psalm to her (T. Hardy 1988, p. 251).

Behold, when thy face is made bare, he that loved thee shall hate;
Thy face shall be no more fair at the fall of thy fate.
For thy life shall fall as a leaf and be shed as the rain;
And the veil of thine head shall be grief; and the crown shall be pain.
(T. Hardy 1988, p. 251)

Just as tragic love influenced the emotional state of three milkmaids whose feelings were not reciprocated, so it negatively affected Tess. The night after confessing the whole truth about her past, she wanted to commit suicide by hanging herself under the mistletoe that Angel had hung as a sign of their former happiness (T. Hardy 1988, pp. 258-259). Although their passionate feeling could have been salvaged, as deep down, under Clare's anger, there was compassion and sympathy that a woman of the world would have known how to use and win her beloved anew, Tess did not think of it. She did not try to defend herself, she took all the words as deserved punishment, and she wanted to inflict this punishment on herself by putting an end to her life (T. Hardy 1988, p. 261). She took everything humbly, made no attempt to tell him the other side of the truth, which was that someone had abused her, and she was unable to protect her innocence. That it was not her sin, but the sin of the culprit of this deed. That is why this love was tragic, because neither of them fought for it. For the happiness that still united them just a few days earlier.

Thus they lived through this despairing day or two; in the same house, truly;
but more widely apart than before they were lovers. (T. Hardy 1988, p. 262)

Soon Tess and Angel had to decide what they were going to do next. She was the first to suggest one possible solution to their current situation.

“And you would like to go home?” he asked.

“I want to leave you, and go home.”

“Then it shall be so.”

Though she did not look up at him she started. There was a difference between the proposition and the covenant, which she had felt only too quickly. (T. Hardy 1988, p. 264)

There was indeed a difference. Angel did not object and thus did not attempt to fight for a successful marriage and a wonderful future as a farmer by the side of his beloved milkmaid. It was decided that Tess would return to her family, and Angel would go to Brazil (T. Hardy 1988, pp. 264-265). However, *when two people are once parted, have abandoned a common domicile and a common environment, new growths insensibly bud upward to fill each vacated place; unforeseen accidents hinder intentions, and old plans are forgotten* (T. Hardy 1988, p. 265). When two people distance themselves from each other the feeling between them weakens and the arguments against return become more and more reasonable. Time diminishes the effect of charm and love. The need for closeness fades and after some time a couple once infatuated with each other, starts a completely new chapter of life and forgets about the other person, whom they used to consider their soulmate.

Although Angel still loved Tess, which he was well aware of when he left her, the demands of society and moral principles won this battle (T. Hardy 1988, pp. 314, 330). They both loved each other and neither of them could fight for it, it was easier to walk away and neglect that beautiful feeling of love. After saying goodbye and spending a few hours on the lonely path of his new life, he was within a feather-weight's turn of abandoning this road and driving through the chain of hills that separated him from his Tess. What stopped him, however, was the unfortunate thought that since he had been right so far, he should still adhere to that decision (T. Hardy 1988, p. 290). The truth, with a moral background that contemporary society would not accept, inhibited him from turning back to his wife. Angel left England, made no effort to win back the love of his life, and their situation remained that way for over a year. For both of them, the year was a time of much worry, unhappiness, and labouring in terrible conditions away from their beloved. The whole story of their love is presented in an intertextual context – the context of a tragedy. The events resemble the stages appearing in a typical tragedy, as for instance the role of fate, tragic end of the protagonists or misunderstandings in human relationships. This type of intertextuality is the example of the connection between a text and a literary genre, according to Ryszard Nycz's theory.

With the death of Catherine, when she began to accompany Heathcliff as a spectre, a long period of unfortunate love began, which only came to an end after Heathcliff's death. During a conversation with Ellen Dean, who went to tell him the tragic news, Heathcliff expressed deep suffering and grief. Unable

to imagine life without Cathy, he wished she would never find peace. He wished for her to become a wraith so that, even in such a terrible way, she would be with him for the rest of his life (E. Brontë 1995, pp. 147-148).

“[...] Catherine Earnshaw, may you not rest, as long as I am living! You said I killed you – haunt me, then! The murdered *do* haunt their murderers. I believe – I know that ghosts *have* wandered on earth. Be with me always – take any form – drive me mad! only *do* not leave me in this abyss, where I cannot find you! Oh, God! it is unutterable! I *cannot* live without my life! I *cannot* live without my soul!” (E. Brontë 1995, pp. 147-148)

His love for Catherine was extremely intense and her death affected him deeply. He felt a longing for his beloved that tortured him to the end of his days. He wanted her to always remain by his side, even if it meant anguish for his mind and for her soul. He found himself in the depths where the meaning of his life was suddenly missing. His soul and purpose of existence were gone and his heart was filled with emptiness and despair.

On the day of Catherine’s funeral, Heathcliff could not contain his sorrow. Since her death, he had continually begged her for days to return to him in spirit (E Brontë 1995, p. 256). Knowing that he would never see his beloved again, he wanted to take her in his arms one last time.

I said to myself –

“ ‘I’ll have her in my arms again! If she be cold, I’ll think it is this north wind that chills *me*; and if she be motionless, it is sleep.’ (E. Brontë 1995, p. 256)

He could not comprehend or acknowledge the fact that his dear Cathy was gone. With all his heart he wanted to believe that she was still alive. Without hesitating a second longer, he took the shovel and started digging until he reached the coffin. However, although he put a lot of effort into opening it, he was unable to do so. Suddenly, he heard a sigh right next to his ear. Despite the freezing wind, he felt someone’s warm breath on his skin. Heathcliff knew without a doubt who was standing next to him (E. Brontë 1995, p. 256).

“[...] as certainly as you perceive the approach to some substantial body in the dark, though it cannot be discerned so certainly I felt that Cathy was there, not under me, but on the earth. (E. Brontë 1995, p. 256)

A sudden sense of relief flowed from his heart through his entire body. He abandoned the desperate effort as he was unspeakably comforted by the presence of his beloved’s spirit. He was so certain that she was by his side when he buried the coffin back and when he returned home that he believed he would find her there and spoke to her all the way to Wuthering Heights. This allowed the emptiness and longing in his heart to be replaced, at least for a while, by presence and peace.

However, this wonderful moment did not last long. Although Heathcliff felt Catherine's breath on him so strongly and sincerely, he could do nothing to see her in person (E. Brontë 1995, p. 256).

“[...] I looked round impatiently – I felt her by me – I could *almost* see her, and yet I *could not*! I ought to have sweat blood then, from the anguish of my yearning, from the fervour of my supplications to have but one glimpse! I had not one. (E. Brontë 1995, pp. 256-257)

This depressed him as much as her death. Once again, he felt he had to bid her farewell. Once again his soul was filled with a complete emptiness. He had lost hope of seeing his dearest Cathy one last time. For many years he lived with feelings of grief, longing, and tragic love.

After suffering torment for eighteen years, Heathcliff made another attempt to see his beloved. When Edgar died, he seized the opportunity to get to Catherine's grave. He persuaded the sexton to remove the earth from Cathy's coffin and opened it himself. He was reluctant to leave the resting place, and it was only when the gravedigger said that her face would change under the air that Heathcliff allowed his beloved to be buried again. However, he knocked out the side of her coffin before doing so, and bribed the sexton to do the same to his coffin when he died so that the lovers could be next to each other and feel their closeness forever. After that, he experienced a sense of relief and peace. He knew that the day would come that they would be reunited, and no one would be able to separate them again. When he returned home, he dreamed that he had slept his last dream, with his heart stopped, and his cheek frozen to the cheek of his beloved Catherine (E. Brontë 1995, p. 255).

Heathcliff was trapped in obsessive longing for many years. His love for Catherine became the source of his loneliness and hopelessness. His life became a void without her, and his attempts to reunite with her after death failed to bring him enduring fulfilment. This led him to a mental breakdown and revealed the tragic dimension of their relationship. The love between Catherine and Heathcliff proved to be tragic not only because of Catherine's death, but also because of the suffering and destruction it brought to Heathcliff. The price he paid for his love was extremely high. Only after his death did he experience solace.

There are those who speak to having met him near the church, and on the moor, and even within this house – Idle tales, you'll say, and so say I. Yet that old man by the kitchen fire affirms he has seen two on 'em, looking out of his chamber window, on every rainy night since his death [...]. (E. Brontë 1995, p. 299)

Nelly also witnessed an odd situation. As she was walking to Thrushcross Grange one evening, she met a little boy with a sheep and two lambs, who was crying loudly. He claimed that near the hill he saw Heathcliff with a woman and was afraid to walk past them. Nelly looked closely at the place the little boy pointed out, but saw no

one. However, neither the boy nor his sheep wanted to pass that way (E. Brontë 1995, p. 299). Certainly, with the end of Heathcliff's life, the time of tragic love was also over. Heathcliff, in an intertextual context, resembles the figure of a Byronic hero: mysterious, attractive and unhappy. His relationship also is analogous to the tragic love of renaissance tragedies.

Tragic love played a major role in the novels *Tess of the d'Urbervilles* and *Wuthering Heights* and was one of the central themes, making its mark on the painful fates of the main characters. Both novels illustrated the impossibility of fulfilling love due to social norms and demands, morality, or death. The three milkmaids, Marian, Izz, and Retty, all loved Angel. However, their feelings were one-sided and unrequited, and the tragic result was that Marian surrendered her pain and misery to alcoholism, Izz suffered a mental breakdown, and Retty attempted suicide. Tess and Angel also experienced tragic love. The aspect of absolute devotion to one's beloved, which had been so beautifully portrayed so far, was now demonstrated by Angel in a very negative way. He realised how utterly and irretrievably Tess was dependent on his good or bad faith and fortune. If he only took advantage of her total devotion to him, he would be able not only to neglect her, but also to hurt her. Although he asked God to forbid him from such a crime, eventually Angel used his power (T. Hardy 1988, p. 236). He was unable to accept her moral past and rejected her, leading them to suffer for a long time. In this story, unrequited and one-sided love, as well as the expectations of contemporary society, prevailed over happiness.

Analysis of the television series *Tess of the D'Urbervilles* and *Wuthering Heights* *Emotions and relationships*

In both series, *Tess of the D'Urbervilles* and *Wuthering Heights*, some aspects of behaviour and relationships are portrayed in a slightly different way than in Hardy and Brontë's novels of the same titles, and emotions are made more prominent. Love, happiness, anger, suffering, hope, longing, and many other feelings are shown through the actors' facial expressions and gestures. The relationship of literature and media enables the readers and viewers to compare the protagonists and various aspects of the stories with their pictures created in their minds. And still, this intermedial relationship influences an independent, individual reception of the stories by the addressees.

Tess and Alec's relationship differs marginally from that described in the novel as a few details have been added by the director. When, during their first meeting, Alec teases Tess's family, particularly about her father's profession, she immediately stands up to him and defends her parents and siblings.² In the novel by Emily Brontë, through most of their relationship Tess is portrayed as a young girl who is very submissive to a man from an upper-class background. Blair, however, creates her as slightly more assertive.

² *Tess of the D'Urbervilles*, ep. 1.

A thread that has been added by the director is that Car and Nancy Darch, the Queen of Spades and the Queen of Diamonds, work at the D'Urbervilles'. From the very beginning they are envious of beautiful Tess. There is immense jealousy evident on their faces. Knowing that something terrible could happen, they invite Tess to Chaseborough. They are malicious, treacherous, and cunning conspirators, and their facial expressions betray the despicable plans they are plotting against Tess.

In terms of emotions, Tess and Alec's farewell scene is very important. When Tess talks about how she feels, helplessness, resignation, sorrow, and hurt are evident on her face. Tears spring into her eyes, one of them running down her cheek.

"You will never love me, will you, Tess?"

"It would do me good now to lie, I suppose. To say yes, I do. But I have enough honour left, little as it is, not to tell that lie. I have never loved you, Alec, and I never will. I don't even hate you. I feel nothing. You are just dust and ashes to me now."³

After these words, Tess walks away and Alec is as much offended as disappointed. Unfortunately, they meet again a few years later. Then not only emotions such as rancour and anger play a significant role, but also gestures and violence. Just as quickly as Tess tells him that she loves someone else and that they must remain strangers, tears roll down Alec's face. However, when Tess tries to walk away from him, he grabs her arm firmly and raises the tone of his voice.⁴ His facial expression immediately changes to one full of evil.

"I must have you Tess. [...] Know this one thing, Tess. I will have you."⁵

How quickly his false humility turns into cruelty. During their next meeting, Alec again shows many conflicting emotions and gestures.

"You've been the cause of my downfall, you might as well share it and leave that mule that you call your husband behind. [...] You little..."

"Go on, hit me. Strike me, punish me! I won't cry out."

"Damn it, Tess. Have I not told you that I love you? Have I not asked you to be my wife? Remember this. I was your master once, I'll be your master again. If you are any man's wife, you are mine."⁶

He first proposes to Tess, tells her that he cannot bear that she is working under such harsh conditions, and wants to save her. Then he blames her for his abandonment of faith. As soon as Tess hits him in the face he raises his hand against

³ Ibid.

⁴ Tess of the D'Urbervilles, ep. 3.

⁵ Ibid.

⁶ Tess of the D'Urbervilles, ep. 4.

her. Cruelty, brutality, and meanness are emphasised on the actor's face. It is full of irony that after this he professes his love for her and renews his marriage proposal which he ends with a terrible promise. This is certainly not love but lust and greed.

Many different emotions are also visible on the faces of Angel, Tess, and the three milkmaids who have also fallen in love with the young man. When Tess and Angel first meet, their gazes are full of passion and infatuation. When they meet again a few years later at Talbothays, he is absolutely captivated by her. He listens with interest and admiration to what she says. The fact that every day they are the first people to get up in the whole dairy is so special and precious to Angel that he compares it to the Bible.

"It's like we're the only people on earth, Tess. Adam and Eve, Tess. Adam and Eve."⁷

When they talk about the future, they both exchange statements that they are very happy now, and this happiness, which comes from being in each other's company, is visible in their eyes.⁸ Their first touch is initiated by Angel. It feels as if time has stopped for them for a moment. The enchantment is once again evident in their expression.

The day Angel returns from his family home, they both profess their love for each other and Angel proposes to his beloved Tess. Angel's face depicts emotions such as happiness and hope, but Tess's eyes are full of great pain and sadness. Because of her past, she has to deny the chance of being happy. However, Angel does not give up. He clings to Tess, he cannot function properly without her closeness and touch. This is strongly emphasised on screen by the wonderful acting. Tess is unable to persist for long and gives in to the feeling of love. She proves her affection for Angel by initiating their first kiss. Their glances are filled with pure joy and love.

When they enjoy their happiness, the three milkmaids, Marian, Izz, and Retty suffer more and more. In the TV series, it is Retty who is the most heartbroken and who suffers the most from all of Tess and Angel's good moments. At night, she is the only one who cannot sleep, thinking about her unhappy and unrequited love. Her facial expression shows a lot of distress and pain. Her eyes constantly follow the lovers. She longs to be in Tess's shoes. However, the director shows the enormous strength of friendship between the milkmaids and Tess. As soon as they learn that she and Angel are going to get married, despite being almost as deeply in love with Angel, they congratulate Tess and rejoice in her happiness.⁹ Even though they are extremely hurt inside. It is a very touching and emotional scene. Retty, despite forgiving Tess and saying she is incapable of hating her, does not attend the wedding.

⁷ *Tess of the D'Urbervilles*, ep. 2.

⁸ Ibid.

⁹ Ibid.

During the ceremony, while Marian and Izzy's tears are running down their cheeks, Retty tries to drown herself. Blair focuses on conveying her heartbreak and suffering.

However, Angel and Tess's happiness does not last long after their wedding. Angel quickly abandons his wife and she is forced to work under very harsh conditions for many months. In addition, the death of her father and being forced to move out of their family home gives Tess the courage to write a letter to her husband, full of anger and rancour. These emotions are only transformed into sorrow and sadness when they meet again after more than a year of separation.

However, the most negative emotions come at the end of the final episode of the series. Tess has been sentenced to death and is waiting for her execution in a cell. Then she hums a song entitled *The Snow It Melts the Soonest*. The melancholic tone of the song and the themes of the transient nature of love and life, as well as the fleetingness of time and emotion, contribute to numerous reflections.

Oh the snow it melts the soonest when the winds begin to sing
And the corn it ripens fastest when the frosts are setting in
And when a young man tells me that my face he'll soon forget
Before we part, I'll tell him now, he'd be fain to follow it yet¹⁰

In the context of Tess's impending execution, the words of the song take on a poignant meaning and evoke a range of emotions, not only for Tess, whose tear rolls down her cheek as she hums the song in the final minutes of her short and miserable life, but also for the viewer. The melting snow is a metaphor for the impermanence of life, the inevitability of change, and the passage of time. It indicates that nothing lasts forever. The ripening corn suggests that sometimes certain situations can bear fruit even under seemingly unfavourable conditions. It may symbolise that Tess was afraid to give in to her feelings of love and emotions full of happiness because of her past. But when she did, she experienced the happiest time of her life, despite the sin she carried on her shoulders and despite Angel coming from a higher social class. The last two lines refer to the worst time of Tess and Angel's relationship. When the young man says that he will soon forget the woman's face, like Angel who wished to forget Tess after learning the whole truth, the woman replies that he will want to remember and follow her. In a moment, Angel can be seen on the hill, following his beloved Tess and waiting for her execution. As the black flag goes up, he falls to his knees, cries, and his whole body shakes from immense pain that cannot be described.

Certain relationships are also portrayed a little differently and emotions are highlighted on the actors' faces in a television series entitled *Wuthering Heights*. These include, for example, Heathcliff's feelings, such as despair over the death of Mr Earnshaw. *Father's dead* are the first words he says to Catherine, who is

¹⁰ Tess of the D'Urbervilles, ep. 4.

standing in the doorway, weeping and resting his head on the dead man's body.¹¹ He calls Mr Earnshaw his father, and treated him as such. He is grateful for the grace he received from a stranger. Pain and suffering are shown through the actor's facial expressions. Just as Heathcliff despaired at his father's death, so Hareton cried over Heathcliff's suicide, cuddled into his body.¹² Indeed, throughout his life he was more of a father to him than Hindley. In the same way, Heathcliff's anger and the evil that was hidden inside him is extremely highlighted once he has returned home after three years. His facial expression is no longer so gentle and the only smile that appears on his face is sinister. He is no longer good-hearted, but vindictive and thirsting for revenge.

“[...] the more revenge I get the greater my appetite for it. [...] I could have been a good man once but then I met Hindley.”¹³

The TV series begins with a dream in which Catherine pleads with the words *Let me in*.¹⁴ Here it is Heathcliff's dream and not Mr Lockwood's, whom Giedroyc excludes from the series' cast. The emotion that is evident on screen is madness due to immense suffering and longing. Shortly afterwards, the director introduces viewers to a scene in which Heathcliff unearths Catherine's grave. His facial expression is that of a madman, which he actually is as even though a skeleton lies in the grave, he nevertheless sees Catherine exactly as he remembers her. As if she were alive and not even a day older. When he finally unearths the grave and cuddles into what is left of his beloved, there is a look of serenity and peace on his face.

The director then goes back to the beginning of their acquaintance and begins to tell the story of Heathcliff at the Earnshaw household from day one. Little Cathy and Heathcliff's infatuation with each other is demonstrated. As Ellen Dean describes it, they are *childhood sweethearts*. They are both very happy in each other's company, the joyful playfulness of the two children is evident and the moments spent together are shown as more carefree than in the novel. They do not suffer the consequences of playing together. At least until Mr Earnshaw lives and he is the master of Wuthering Heights. The sudden transition into teenage years indicates that this is how several years have passed, on carefree moments spent happily in each other's company.

Heathcliff is very kind towards Cathy. When Mr Earnshaw buys him a horse and Heathcliff sees that Catherine likes the animal immensely, he gives the mare to his beloved without hesitation. In the novel, Heathcliff takes Hindley's pony when his own becomes ill. The director, however, portrays it very differently. Heathcliff is a good-natured man, not a greedy, cunning, and rapacious one. A moment later, the

¹¹ Wuthering Heights, ep. 1.

¹² Wuthering Heights, ep. 2.

¹³ Ibid.

¹⁴ Wuthering Heights, ep. 1.

lovers can be seen lying on the grass. As in the TV series entitled *Tess of the D'Urbervilles*, the woman, Cathy, initiates the first kiss. With this gesture she proves the great value of her beloved¹⁵.

Catherine and Heathcliff's good times come to an end when she stays for a few weeks at Thrushcross Grange. Heathcliff peeps at her through the window as she spends time with Edgar. His eyes are full of sadness and heartbreak as he loses the only person who understands and loves him. Shortly after Cathy returns home, she has a conversation with Heathcliff about her engagement to Linton.

"And have you considered how you will bear separation from me and how I will be quite deserted in the world without you? Did you consider that?"¹⁶

He does not hide his emotions. When Cathy confesses to him that as Mrs Linton, with Edgar's money, she could save Heathcliff from the hands of her cruel brother, he walks away. He does not want such help or mercy. As in the TV series he learns all of this from Cathy telling him to his face, rather than overhearing from the next room as in the novel, it certainly evokes even stronger emotions in him.

Heathcliff returns after three years. When he meets Catherine for the first time, after such a long separation, they are extremely happy. She, despite being married, does not spare him the kisses she had shied away from in Edgar's presence. Although their love never died, Catherine's health begins to decline with Heathcliff's return. However, even being ill she puts herself at risk of death by going out into the cold air and rain, just to see her beloved Heathcliff, even just for a moment. Unfortunately, a short time later she is dying.

"Let me die in your arms. Don't leave me. Don't leave."¹⁷

Heathcliff embraces her tightly in his arms. They both feel great despair. When Catherine dies Heathcliff suffers as much as Angel who lost his beloved Tess. A grown man who would not seem to shed a single tear, begins to cry and scream terribly. During her funeral, he leans over her body and whispers to her, sobbing.

"I cannot live without my life. I cannot live without my soul."¹⁸

This time he lost her forever. His subsequent life is a series of memories of his beloved Cathy and constant and relentless suffering.

¹⁵ Ibid.

¹⁶ Ibid.

¹⁷ *Wuthering Heights*, ep. 2.

¹⁸ Ibid.

“The entire world is a dreadful collection of memoranda that she did exist and that I have lost her.”¹⁹

However, their story ends with fulfilment and happiness. Heathcliff commits suicide and then, as a phantom, enters the house where Catherine is already waiting for him. They are both happy wardens of Wuthering Heights.

Edgar’s emotions are also brilliantly reflected on screen. On his and Cathy’s wedding day, as she walks down the aisle, his eyes are full of genuine love and admiration. However, Edgar and Catherine’s relationship is portrayed a little differently than in the novel. In the book, their marriage is described as slightly happier. While reading the novel, the reader is able to believe that it was a successful relationship, at least until Heathcliff’s return. However, here it is apparent that she lusts after Heathcliff and does not hide this at all. She is not happy with Edgar and is only at Thrushcross Grange for the luxury and money of her husband. Her closeness and kisses are much resented. When Edgar confronts her with the choice between friendship with him or with Heathcliff, for whoever is his friend cannot also be devoted to his enemy, Cathy openly replies to him that she would choose her beloved Heathcliff without hesitation if she was not pregnant²⁰.

However, when Catherine dies, Edgar misses her deeply. He constantly visits her grave. He spends every anniversary of his beloved wife’s death in the cemetery, thus hurting his daughter, especially on her eighteenth birthday.

„Why does his sadness at mother’s death always weigh on his happiness that I was born?”²¹

Without his wife, Edgar is living a sorrowful life. When he himself is dying, he makes sure his daughter will be happy, then mentions Cathy, saying he can go to her now, and passes away²². He is committed to his wife, who has been unfaithful to him.

The relationship between Hareton and Cathy is also significantly different. There is much less hatred between them in the television series, and Cathy does not make fun of him at all. Hareton is extremely kind to her, smiling pleasantly, handing her books, slipping her a chair so that she can sit closer to the fireplace and keep warm. From the beginning there is more kindness, goodness, and love between them than in the novel. Furthermore, the series ends with love. Cathy and Hareton pack up and head off towards Thrushcross Grange to live there as a happily married couple and Catherine and Heathcliff’s ghosts remain in Wuthering Heights so that, equally happy, they can watch over the house where no one will now separate them.

¹⁹ Ibid.

²⁰ Ibid.

²¹ *Wuthering Heights*, ep. 1.

²² *Wuthering Heights*, ep. 2.

Analysis of Kate Bush's song Wuthering Heights

Another interesting intermedial coexistence can be seen in the song by Kate Bush. Her first encounter with *Wuthering Heights* was in 1977. She wrote the song, of the same title, in a single night. Released in 1978 it was her debut song, which immediately reached the top of the UK singles charts.²³ According to Brendan Mathews, at that time Bush was nineteen years old, which, interestingly, is about the same age as Cathy in the moment of her death, whom Bush impersonates in her song. As Mathews notes in his article, at a time when women were mainly seen as interpreters of other people's texts rather than creators of their own works, Bush achieved great success. She presented her view of Cathy and Heathcliff's story in her own words and in her own way. Such times and obstacles connected her with Emily Brontë, the author of the novel entitled *Wuthering Heights*.²⁴

According to Mathews, Kate Bush's shift to Catherine's point of view focuses the song entirely on her and Heathcliff, which corresponds perfectly with how the novel's protagonist perceives the world. She claims that she and Heathcliff share one soul and everyone else, including her husband Edgar, is just background. When watching the video for the song entitled *Wuthering Heights*, there is the impression of watching an artist consumed by a sense of personal vision. Her voice soars and rumbles, and her dancing is a combination of pirouettes, leaps, and even sleepwalking (fot. 3.1.).²⁵



Fot. 3.1. Dance movements

(Kate Bush, "Wuthering Heights," *The Kick Inside*, Version 1, EMI Records, 1978)

²³ <https://lithub.com/on-kate-bushs-radical-interpretation-of-wuthering-heights/>, Brendan Mathews, "On Kate Bush's Radical Interpretation of Wuthering Heights," *Literary Hub*, February 13, 2019, accessed on June 2, 2024.

²⁴ Ibid.

²⁵ Ibid.

Kate Bush sings from Cathy's perspective, which adds emotional depth to the song. Bush's distinctive high-pitched voice, gives the story she presents an ethereal, almost supernatural character, which emphasises the theme of ghost hauntings. The longing, pain, and desperation that is characteristic of Cathy's phantom, who actually haunts Heathcliff for many years, can be heard in her voice. The video is as emotional and mysterious as the singer's vocals. Kate Bush is wearing a white dress, which may symbolise Catherine's spirit. Through her smooth and expressive dance movements, she reflects the freedom Catherine experiences in the netherworld, but also the pain and madness from longing and desire. The background of the music video, although seemingly simple and perhaps not eye-catching, is nevertheless austere and emphasises the atmosphere of isolation and loneliness.

Kate Bush leads the viewer and listener into a world where the boundary between reality and fantasy disappears. Watching and listening to her artistic interpretation, one has the impression of being part of the story, as if witnessing the dramatic events on the moors oneself. The song puts the audience in a state of emotional tension. Bush's voice and her dramatic performance make the listener feel the emotions of the characters in the novel, especially Cathy. This leads to a deeper understanding and empathy towards the characters, even though they are fictional. Bush's expressive dancing is almost mesmerising and her gazes are full of mystery. Her constantly wide-open eyes evoke dismay and curiosity (fot. 3.2.).



Fot. 3.2. Facial expressions

(Kate Bush, "Wuthering Heights," *The Kick Inside*, Version 1, EMI Records, 1978)

When it comes to the lyrics, they are similarly interesting and intriguing. The line *I hated you, I loved you, too*, brilliantly shows that Catherine and Heathcliff's

relationship is so passionate and so complicated that it combines love and hate at the same time.²⁶

They told me I was going to lose the fight
 Leave behind my wuthering, wuthering
 Wuthering Heights²⁷

These words underline the fact that Cathy indeed leaves behind her beloved Wuthering Heights where she once carelessly spent time with her beloved and dies. She loses her battle with illness.

Too long I roam in the night
 I'm coming back to his side, to put it right²⁸

With these words, Bush probably wants to convey to the audience that maybe if Cathy had not chosen the money aspect but the love of her life, things would have turned out differently. However, it is already far too late to rectify this decision. Through the words *Let me in your window*, Cathy addresses Heathcliff.²⁹ In the novel it is the window of the room in which Lockwood sleeps, and here, as in the television series, Cathy haunts Heathcliff in a dream. Further on she sings *Let me grab your soul away*, and Heathcliff actually commits suicide for Cathy, which is shown in the TV series, and once he dies he sees the ghost of his beloved in Wuthering Heights.³⁰ Catherine does in fact take his spirit into her world, the netherworld, where they both become ghosts that no one can separate.

Wuthering Heights is much more than just a song, it is an experience that combines music, literature, and visual art into one incredible work. Kate Bush's mystery, emotion, and artistic vision ensure that this composition remains timeless.

To sum up, the new image of the well-known classical characters from the novels makes the stories become closer to the addressees of modern art: both film and music. Their appearance in new media means their rebirth, their new interpretations, as well as new possibilities for the stories to appear in modern art. It is constant retelling the same stories, but each time it is different, as the new meanings are built up by new recipients and their personal experience.

²⁶ <https://www.youtube.com/watch?v=-1pMMIe4hb4>, Kate Bush, "Wuthering Heights," *The Kick Inside*, Version 1, EMI Records, 1978. accessed on June 5, 2024.

²⁷ Ibid.

²⁸ Ibid.

²⁹ Ibid.

³⁰ Ibid.

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IS LORD OF THE FLIES STILL RELEVANT? – A PSYCHOLOGICAL READING OF GOLDING’S NOVEL IN REFERENCE TO MODERN TIMES

Abstract: This paper focuses on the relevance of the plot of *Lord of the Flies* by William Golding in the current times, and explores the influence of the Freudian psychoanalytic theory on the interpreting of the novel. The main aim of the article is to compare the relationship between the characters of the novel and contemporary children and adolescents, by providing examples of juvenile delinquency, occurring in Poland in last 5 years. In the presented text, I explore the aspect of childish evil, brutality and the pursuit of power, trying to answer the question whether evil among children is fading, changing or remains the same.

Keywords: juvenile delinquency, teenage perpetrators, teenage victims, ego, super-ego, id, pride, leadership.

Streszczenie: Niniejszy artykuł podejmuje próbę odpowiedzi na pytanie aktualności powieści Williama Goldinga *Władcy much* w dzisiejszych czasach, a także bada wpływ freudowskiej teorii psychoanalitycznej na interpretację powieści. Głównym celem jest porównanie relacji między bohaterami powieści a współczesnymi dziećmi i młodzieżą poprzez przedstawienie przykładów przestępczości wśród nieletnich występujących w Polsce w ostatnim pięcioleciu. W niniejszym artykule badam aspekty dziecięcego zła, brutalności i dążenia do władzy, próbując odpowiedzieć na pytanie, czy zło wśród dzieci zanika, zmienia się, czy pozostaje takie samo?

Słowa kluczowe: przestępczość nieletnich, nastoletni sprawcy i ofiary, ego, super-ego, id, duma, przywództwo.

Literature is an essential part of people’s lives. From a very young age, humankind comes in contact with the written word whether in the form of a bedtime story, compulsory reading, or, finally, a book of one’s own choosing. The greatest beauty of literature, and at the same time one of its most prominent factor, is that everybody can interpret it in their own way. According to the popular proverb that as many people as many opinions, the same text will be a rather

tedious and incomprehensible piece of writing for some, and for others, an extremely important and outstanding work. This approach is no different regarding the novel *Lord of the Flies*. Its author, William Golding is one of the most acclaimed English authors of the 20th century, having won prestigious literary prizes including the Nobel Prize, and the Brooker Prize. With the enormous popularity of the novel, which remains on the school reading lists, and its allegorical nature, there are numerous interpretations of it. Golding's novel is a comprehensive collection of motifs, complex characters and seemingly unusual events. When reading the novel, it is impossible to overlook the evident references to other, earlier texts. In *A Moving Target*, Golding himself said that the inspiration for writing *Lord of the Flies* came from the novels *The Coral Island* by Robert Michael Ballantyne and *Treasure Island* by Robert Louis Stevenson.¹ In an conversation with his wife, the English writer made a negative assessment of the plot, stating that it was unrealistic and that the boys, who were thrown into a new reality, were straining to prove to the reader about noble human nature. The author's words:

Wouldn't it be a good idea if I wrote a story about boys on an island
and let them behave the way they really would? ²

were the beginning of a novel that, even seventy years after its publication, continues to attract the readers all over the world. As mentioned above, Golding's novel draws on other works. Hence, literary critics often analyse *Lord of the Flies* in terms of intertextuality, a movement explored by de Saussure, Bakhtin and Kristeva, who summarised the whole essentials of this literary tool in the words: "any text is constructed as a mosaic of quotations".³ There are well-known interpretations exploring the interconnections between the content of the text and the location of the action in each novel, for the island is not only an unfamiliar and naturally beautiful place, but above all a place of inner transformation for the characters, engaged in an inner struggle between good and evil.⁴ There are also plenty of interpretations of the work's content through a biblical perspective. In the conducted study, E. C. Bufkin debated on how Golding's novel incorporated the theme of the Fall of Man. The scholar noted the similarities between *Lord of the Flies* and *Paradise Lost* by John Milton. In this comparison, Bufkin indicated the correlations between idyllic island and Eden, the brutal killing of sow and Original Sin, boys as survivors of plane crashes and angels descending from

¹ Golding, W. (1983), *A Moving Target*. New York: Farrar. Starus. Giroux, pp. 162.

² Ibidem, 163.

³ Kristeva, J. (1986), *The Kristeva Reader*, New York: Columbia University Press, pp. 37.

⁴ Easa, K. M. (2024), William Golding's *Lord of the Flies* and Literary Correlations: Intertextuality in Practice. *International Journal of English Literature and Social Sciences* 9, 5. DOI:10.22161/ijels.

heaven.⁵ All the described examples, point to the multiple nature of the work and the different ways in which its meaning can be perceived. In this paper, I would like to focus on a psychoanalytic reading of the work. In particular, I would like to analyse the relationship between the main characters, their actions and compare them with those of contemporary children. Correlating the events and behaviour of the novel's protagonists with current cases is possible through presentism. It is a literary concept that became embedded in literary research methodology around 2000, with Terence Hawkes as its main promoter. Presentism abandons the historicist manner of deciphering the meaning of a work. Instead, it focuses on reading a literary piece with contemporary realities in mind.⁶ Peter Barry emphasises that simply reading a text is not enough, it is necessary to look for references, parallels, and connections between its content and what is familiar to the reader because a story without a contemporary context is like “speaking with the dead”.⁷ Researchers employing presentism “look for the present in the past”.⁸ In understanding the author's intention, it is crucial to analyse various events because: “literature can best be understood through history”.⁹ Therefore, it can be said that to comprehend the text, readers must connect its content to the present as only this approach enables them to decode the meaning effectively. A psychological reading of the novel is possible by analysing its content through the principles and postulates of the main scholar in this field, Sigmund Freud, the founder of psychoanalysis. In *A General Introduction to Psychoanalysis*, Freud introduced a theory of the tripartite structure of the human mind, strongly connected to the libido, that was revolutionary for its time. This Austrian psychiatrist and neurologist is the developer of theories of the influence of the unconscious mind on our behaviour. This view implies the existence of an id, an ego and a super-ego. The id is that part of the human mind which contains all the darkest desires, lusts, instincts, often animalistic, the urge to survive at all costs and the deep need to satisfy the most primal needs. That is, the id is what we want to hide from others. The super-ego is the part of the psyche that represents the complete opposite of the id. This component represents the noblest behaviour, the need to maintain moral order and social order. The super-ego gives an image of how we want others to see us. The ego, which is closest to man, is the part of the psyche that tries to preserve the balance between the id and the super-ego. It is the ego that allows one to perceive and uphold societal and moral norms, thus

⁵ Bufkin, E. C. (1965), *Lord of the Flies: An Analysis*. Georgia: *The Georgia Review*, 19, 1, pp. 40-57.

⁶ Barry, P. (2009), *Beginning theory: an introduction to literary and cultural theory*. Manchester: Manchester University Press, pp. 293.

⁷ Ibidem.

⁸ Ibidem.

⁹ Ibidem, p. 292.

enabling one to control one's instincts. Freud also claimed that dreams are like the window to human psyche, an illustration of inner dilemmas.¹⁰

Many researchers have undertaken interpretive considerations along the lines of psychoanalysis. The most notable critics include Claire Rosenfield and her interpretation of characters as the representatives of Freud's theory constituents. In her essay *Men of a Smaller Growth: A Psychological Analysis of William Golding's Lord of the Flies*, Rosenfield points out that Jack represented Id, Ralph was the embodiment of the ego, and super-ego was illustrated by Piggy. Rosenfield analysed how the boys' descent into savagery mirrored the conflict between the id and the super-ego.¹¹ The author also found references to the Bible. In her view, Jack, from his appearance and behaviour, pictured Satan, who was blinded by Ralph's angelic radiance. In this way, Rosenfield argued, Golding made the vast differences between the boys even more apparent, and the struggle between good and evil, id and ego, was unmissable. She also explored the symbolic elements in the novel. In her opinion, the conch represented order and civilization (super-ego), Piggy's glasses symbolized knowledge and rationality, and the Lord of the Flies (the pig head mounted on a sharpened stick) signified the darker, instinctual forces (id) within the boys. Piggy was also depicted as a boy embodying the characteristics of a wise, experienced man. The scholar pointed out that he resembles the father figure in the way he looks and behaves. The young boy had the highest sense of morality. He echoed Ralph's rules and drive for maintaining social norms, he was willing to notice and understand the littluns' fears.¹² Another scholar, who investigated the novel is Charles Brian Cox. In his analysis, he often used Freudian concepts to discuss the psychological aspects of the boys' descent into savagery. He explored how the novel reflects the struggle between the id, ego, and super-ego.¹³ Bernard Dick's work often incorporated Freudian analysis to inquire into how the novel illustrates the tension between the conscious and unconscious mind. The researcher highlighted the usefulness of applying the presuppositions of psychoanalysis in analysing *Lord of the Flies*.¹⁴ At the same time, he noted Golding's distinctiveness from any theory, citing that the author himself warned recipients that he "owes little to contemporary literature".¹⁵

¹⁰ Freud, S. (1920), *A General Introduction to Psychoanalysis*. New York: Horace Liveright, p. 110-122, 124-127.

¹¹ Rosenfield, C. (1961), *Men of a Smaller Growth: A Psychological Analysis of William Golding's 'Lord of the Flies'*, *Literature and Psychology*, Vol. XI, No. 4, Autumn, 1961, pp. 93-101.

¹² Ibidem.

¹³ Cox, C. B. (1960), *Lord of the Flies*. *Critical Quarterly*: Vol. II, Issue II, pp. 112-117. <https://doi.org/10.1111/j.1467-8705.1960.tb00848.x>.

¹⁴ Dick, B. F. (1967), *William Golding*. New York: Twayne Publishers, Inc. pp. 94-98.

¹⁵ Ibidem, p. 11-12.

As can be seen from the approaches described above, the main characters represent radically different attitudes. Ralph embodies the desire to preserve order and to act according to social and moral principles. Jack is the epitome of chaos, the triumph of animalistic urges. Piggy is a physically weaker individual, but the one who displays a commendable attitude of striving to control primal instincts. Childish innocence, affected by a different reality, harsh conditions and lack of adult supervision, was lost. The boys, fighting first for survival and then for power, embodied the constituents of the psychoanalytical vision of the mind. People displaying such attitudes are among us. In the contemporary world, there is no absence of reprehensible behaviour, violent altercations, the initiation and fuelling of hatred towards another human being. This is particularly evident, as in the case of the characters in the novel, among contemporary children and young people. It can be said with full conviction, just by looking at the cases and newspaper articles published in Poland in the last 5 years. The two of the described situations took place in 2023 and, therefore, are as recent as possible. In February, Poland was shaken by the case of the fatal beating of a 16-year-old from Zamość.¹⁶ For Eryk, it was just another ordinary day. After school he was due to go to his grandmother's for lunch. However, he never made it there.¹⁷ According to the Fakt newspaper, this tragic beating was intended to silence the boy, who, as the provocateur of the whole incident testified, had been spreading rumours about her. As the abusers explained, the battery was to "get even".¹⁸ What is particularly devastating is that the murder took place in broad daylight. The teenager was attacked in the city centre, the committers did not hide. The commander of the Zamość municipal police emphasised that the incident did not last a few seconds but much longer, about 5-7 minutes. Despite this, no one reacted.¹⁹ Piggy was killed in almost identical circumstances. His death suited the hunters' book. They did not hide either; they killed Piggy in front of the other boys. Both boys were killed in the light of day, among other people passively watching.

¹⁶ KMK, (2023). Nowe fakty w sprawie śmierci 16-latka. Stali i patrzyli, jak błagał o życie. Pobrano z: <https://wiadomosci.onet.pl/lublin/nowe-fakty-w-sprawie-smierci-16-latka-stali-i-patrzyli-jak-blagal-o-zycie/xwk0xed>. Te i kolejne tłumaczenia z języka polskiego zostały wykonane przeze mnie.

¹⁷ Górny, J. (2023). Śmiertelne pobicie Eryka z Zamościa. Śledczy dotarli do skasowanych wiadomości 16-latki. Zatrważające ustalenia. Pobrano z: <https://www.fakt.pl/wydarzenia/polska/lublin/zamosc-smiertelne-pobicie-eryka-16-letnia-gabriela-p-z-zarzutem/6k0xv1v>.

¹⁸ IB, (2023). Wycierał krew Eryka z butów. Przerażające słowa oprawcy 16-latka. To było zaplanowane. Pobrano z: <https://www.fakt.pl/wydarzenia/polska/lublin/zamosc-przerazajace-slowa-daniela-g-o-zakatowanym-eryku-to-bylo-zaplanowane/j262fvj>.

¹⁹ Fakt, (2023). Śmiertelne pobicie 16-latka w Zamościu. Rozpacz mamy skatowanego Eryka. "To nie są dzieci, to mordercy". Pobrano z: <https://www.fakt.pl/wydarzenia/polska/lublin/zamosc-smiertelne-pobicie-16-latka-mama-eryka-to-nie-sa-dzieci-to-mordercy/4x2e49m>.

Piggy, like the slaughtered 16-year-old, was inconvenient to the rest, his need to think rationally and maintain social order did not match Jack's authoritative approach. His words, as the words of the Polish teenager, did not please the perpetrators, who literally took matters into their own hands. Another aspect linking the event in the novel to the actual case is intent. In *Lord of the Flies*, Roger slipping the stone is driven by a lust to injure, not necessarily to kill Ralph or Piggy; there was no clear purpose to the murder. The criminals from Zamość testified that their aim was not to kill but "only" to beat the victim, who was to learn his lesson.²⁰ It is fortunate that in the case of Eric's death, the perpetrators were punished.²¹ What is worth noting here, is the fact that a new narrative is created after certain occurrence. Rosenfield noted that every action brings a given reaction and results in the creation of new rules and a different reality.²² In this case, the marking of domination can be observed, the passive witnesses are there to see what will happen if they defy those more powerful than themselves. In the novel it was Jack, who yelled at Ralph:

See? See? That's what you'll get! I meant that!²³

In Zamość it was the teenage attackers, who were stronger and held an upper hand. Although statistics presented by The Police of the Republic of Poland show a marginal decrease in youth crime, the figures are still considerably high. After theft and property damage, it is beatings, fights, murders and attempted murders that constitute the most numerous groups of offences.²⁴ In Zamość, where one of the tragedies I have presented occurred, there has been an increase in incidents of fights involving minors from 1 happening in 2021 to 8 recorded in 2022. There are many reasons of this phenomenon, according to the deputy municipal police chief of Zamość.²⁵ Drugs, poor social companionship, unrestricted access to various content on the internet, lack of supervision by parents and guardians are just a few examples. The same reasons are also stated by the Ministry of the

²⁰ KWP w Lublinie, (2024). Pobrano z: <https://www.policja.pl/pol/aktualnosci/228826,Zarzuty-i-tymczasowy-areszt-za-smiertelne-pobicie-16-latka.html?search=4016151>.

²¹ Brzuszkiewicz, J. (2024), Gazeta Wyborcza. Zapadły wyroki za śmiertelne pobicie 16-letniego Eryka z Zamościa. "To był błahy powód". Pobrano z: <https://lublin.wyborcza.pl/lublin/7,48724,31094822,zapadly-wyroki-za-smiertelne-pobicie-16-letniego-eryka-z-zamoscia.html>.

²² Rosenfield, 1961, p. 100-101.

²³ Golding, W. (1954). *Lord of the Flies*. London: Faber and Faber Limited, p. 201.

²⁴ Główny Urząd Statystyczny, *Prawomocnie skazane osoby w wieku 17-21 lat*. Pobrano z: https://stat.gov.pl/download/gfx/portalinformacyjny/pl/defaultaktualnosci/6285/3/1/1/prawomocnie_skazane_osoby_w_wieku_17-21_lat_2.xlsx.

²⁵ Gazeta.pl (2023). Śmiertelne pobicie 16-latka w Zamościu. Dzień przed tragedią radni mówili o wzroście przestępczości. Pobrano z: <https://wiadomosci.gazeta.pl/wiadomosci/7,114883,29521201,smiertelne-pobicie-16-latka-w-zamosciu-dzien-przed-tragedia.html>

Interior and Administration, which emphasises that despite the evolution of forms of offences (an increase in anti-social behaviour observed in virtual spaces), the problem is still widespread.²⁶ At this point, it is important to highlight that, in the novel, the protagonists were obviously not struggling with contemporary influences such as the internet or drugs. Nonetheless, they still did evil, resorting to the same forms as contemporary teenagers: bullying, beatings, torture, disconnection from the group and finally physical violence resulting in death. This underlines the fact that times change, new trends come and go, young people are confronted with new realities demanding new solutions from them, but one thing remains the same: evil.

In 2019, a 17-year-old boy was killed in one of the districts in Warsaw. Kuba was brutally stabbed in a school corridor, a place that should be a safe environment. He was killed by a 15-year-old boy, a student of the same school. Although no official motives for the crime were given, the witnesses claimed that it was revenge for not returning the borrowed money. What strikes the most is the fact that the killer, despite being so young, had already appeared in court for legal violations.²⁷ This illustrates the scale of the depravity of young people and children. Evil does not pass them by, morals are disturbed and the false conviction of being right is fatal. The crime, as many in *Lord of the Flies*, took place during the day, in the midst of bystanders. The attacker also did not hide at all; on the contrary, he chose a crowded place to dispense so called *justice*. As stated by the victim's classmates, the assailant, after delivering the first stabs, ran after Kuba into the classroom, stabbing him again and again.²⁸ This frantic pursuit of the victim, slashing blindly, fanatical behaviour, and despicable shouts, is deceptively reminiscent of situations from the novel where the boys killed a pig, chanting frenetically:

Kill the pig. Cut her throat. Spill her blood.
Kill the pig. Cut her throat. Bash her in.²⁹

A press representative from the Warsaw Police Headquarters, formally confirmed that a sharp tool was used as an implement of the crime.³⁰ The knife,

²⁶ Projekt uchwały Rady Ministrów w sprawie „Rządowego programu ograniczania przestępczości i społecznych zachowań Razem bezpieczniej na lata 2025-2028. Pobrano z: <https://www.gov.pl/web/mswia/projekt-uchwaly-rady-ministrow-w-sprawie-rzadowego-programu-ograniczania-przestepczosci-i-aspoecznych-zachowan-razem-bezpieczniej-na-lata-2025--2029>.

²⁷ Siałkowski, K. (2019). Tragedia w szkole w Wawrze. Uczeń zabił ucznia. Świadczenie o napastniku: chyba mu odbiło od narkotyków. Pobrano z: <https://warszawa.wyborcza.pl/warszawa/7,54420,24771116,tragedia-w-szkole-w-wawrze-nie-zyje-mloda-osoba.html>.

²⁸ Ibidem.

²⁹ Golding, W., pp. 72, 79.

³⁰ Mikołajewska, M. (2019). Śmierć w szkole w Wawrze. "Zaatakował ostrym narzędziem".

also so often used by *Lord of the Flies* characters, became the murder weapon, something that took the life of such a young man. In one of the final scenes of Golding's novel, there is a scene of the choirboys, led by Jack, chasing after Ralph. They, like the Warsaw murderer, were shouting after him, brandishing weapons. Like the Warsaw murderer, they were "boys armed with sticks"³¹, and the sticks were "sharpened at both ends".³² Rosenfield noted this resemblance, stating that as Ralph got excluded from the rest of the boys, he became a target of animal-like hunt. Jack prepared his stick to place his former companion's head on it, as was done with a hunted pig.³³ The 15-year-old stabber had also made similar preparations. According to a spokesman for the District Prosecutor's Office in Warsaw, it is clear that the teenager had planned the attack. Moreover, from the correspondence obtained by the authorities, it appears that he was fully aware of the consequences.³⁴ What is also notable in both cases, is the type of relationship between victim and attackers. Both Ralph and Kuba knew their tormentors. The novel's protagonist initially had a relatively good relationship with Jack, and together they attempted to form a cohesive society, guided by moral principles. Over time, however, their relationship deteriorated considerably, and disputes began to arise, stemming from their changing viewpoints. The 17-year-old from Warsaw went to the same school as his murderer. Both the murdered young man's mother and his schoolmates confirmed that this was not the killer's first attempt to intimidate the victim. Two months before the murder, he and other friends had kidnapped Kuba, abducted him to the woods and demanded money, threatening that if he did not get it, he "could dig his own grave".³⁵ The teenager was regularly bullied, ridiculed and humiliated. A personal problem on the killer's part, who was supported by his friends, also detained by the police, had tragic consequences. Jack, like the Warsaw killer, was not alone; he had his supporters. Rosenfield pointed out that in the novel the boys followed Jack because he gave them what they needed – meat. Afterwards, many of them were simply afraid to oppose Merridew's authoritative rule. The boys, despite knowing Ralph, did not dare to oppose the terror introduced by Jack. Contemporarily, children and young people no longer fight for meat, but often for a sense of belonging and acceptance

Pobrano z: <https://tvn24.pl/tvnwarszawa/najnowsze/smierc-w-szkole-w-wawrze-zaatakowal-ostry-narzedziem-ls131268>.

³¹ Golding, W., p. 137.

³² Ibidem, p. 211.

³³ Rosenfield, C., p. 100.

³⁴ Czuma, B. (2019). Zabójstwo nastolatka w szkole. Jest akt oskarżenia dla Emila B. Pobrano z: <https://wiadomosci.wp.pl/warszawa/warszawa-wawer-zabojstwo-nastolatka-w-szkole-jest-akt-oskarzenia-dla-emila-b-6457666090047105a>.

³⁵ Gołdyn, D. (2019). Zabójstwo 16-latka w szkole. Matka ujawnia szokujące szczegóły. Pobrano z: <https://wiadomosci.radiozet.pl/polska/Wawer.-Zabojstwo-16-latka-w-szkole.-Matka-ujawnia-szokujace-szczegoly>.

from their peers. Driven by this, they often blindly follow the crowd, failing to consider the consequences or deliberately ignoring them.³⁶

Another example depicting connections between the novel and current reality is a case from 2023. A group of teenagers attacked a much younger peer, forcing him into a series of degrading behaviours. The boy's mother recounted how the attackers beat, kicked, spat, humiliated, and choked her son. The sight of the crying and terrified child was not enough for the perpetrators. The teenagers made him kneel, renounced his support for one of the football clubs, kissed the material covered in urine, and tried to set his hair on fire with a lighter. As well as directly attacking the boy, they also destroyed his bicycle. From the information provided, it also became clear that Alan is a child on the autism spectrum, making him reluctant to tell what happened. From the boy's mother's words, it seems that this traumatic event negated the boy's years of therapy, shattering his confidence and disrupting understanding of familiar and learned behaviours.³⁷ This factor means that this terrible act, reprehensible in itself, had even more serious consequences. People on the autism spectrum have difficulty imitating other people and often withdraw from social contact, resulting in a reduced interest in their surroundings. There are also difficulties in reacting quickly to changing stimuli.³⁸ Unfortunately, the pattern noticed in the previous two cases described also repeats itself: the victim knew his abusers. Moreover, they were known by the boy's immediate family as they had visited his family home on several occasions. Also, they often spend time in the same playground where the boy was playing with his friends. Shortly before this assault, the same teenagers had attacked Alan, stealing parts of his Halloween costume.³⁹ This case and the plot of the novel are also interconnected by the fact that the attackers are clearly superior to the victim: there are more of them, they are older and stronger. The younger boy is also autistic, which makes him an "easier target" to assault. In Golding's novel, some of the boys also face various health ailments. Piggy has problems with his eyesight and asthma, which is why he has weaker mobility and coordination. The boy's asthma is often the reason he is laughed at, and the words "Sucks to your ass-mar!"⁴⁰,

³⁶ Rosenfield, C., p. 96.

³⁷ Ratajczak, A. (2023). Mama gnębionego przez wyrostków 9-latka przerywa milczenie. To straszne, co ujawniła. Pobrano z: <https://www.fakt.pl/wydarzenia/polska/slask/mama-gnebnionego-9-latka-z-chorzowa-przerywa-milczenie-straszne-co-ujawnila/6qvp4yv>.

³⁸ Szerła, A. (2021). Rodzicielskie spojrzenie na relacje rówieśnicze dziecka z zaburzeniami ze spektrum autyzmu. *Od integracji do inkluzji. 30 lat edukacji integracyjnej – idea i rzeczywistość*. Vol. I, pp. 370-384. Warsaw: Wydawnictwo Akademii Pedagogiki Specjalnej im. Marii Grzegorzewskiej.

³⁹ Ibidem, Ratajczak (2023).

⁴⁰ Golding, p. 8.

are frequently recurring in the piece. The boys tend to belittle him as he is clearly physically weaker and is often the object of ridicule:

Ralph turned and smiled involuntarily. Piggy was a bore; his fat, his ass-mar and his matter-of-fact ideas were dull, but there was always a little pleasure to be got out of pulling his leg, even if one did it by accident.⁴¹
Just like the boy from Chorzów, “Piggy saw the smile and misinterpreted it as friendliness”.⁴²

The other character with health problems is Simon. Although not explicitly stated in the novel, the symptoms he faces may indicate epilepsy: he faints frequently, suffers from sensory disturbance and, in particularly stressful situations:

In Simon's right temple, a pulse began to beat on the brain.⁴³

Rosenfield highlighted that Simon being a boy with poor health makes him rejected from the group but also isolates himself, he is considered the one with the “defect”. The boy becomes the victim of the others who, in a frenzied attack, take him for a beast.⁴⁴

Another similarity between the novel and reality is the pride. Jack felt it after the crimes he committed, embracing the moment as something worth showing to others. Now, it is expressed in the recording and sharing of videos of such pseudo-confrontations and harassment of others. In the case of the assault on the 9-year-old boy from Chorzów, the perpetrators proudly boasted of oppressing the minor.⁴⁵ There are several recordings, from different angles, showing various examples of abuse of the boy. Disturbingly, these infamous videos, posted on X (formerly Twitter), were quite popular, indicating the appalling scale of the phenomenon. These recordings, however, were also the reason they were punished—reported to the police, they became irrefutable evidence in a court case. After a time, the perpetrators had similar emotions to some of the characters in *Lord of the Flies*. In court, they were no longer so confident and sure of their superiority but rather frightened and tried to hide behind their parents and guardians.⁴⁶

⁴¹ Ibidem, p. 67-68.

⁴² Ibidem, p. 68.

⁴³ Ibidem, p. 152.

⁴⁴ Golding, p. 99.

⁴⁵ Pawlik, P. (2023). Grupa nastolatków znęcała się nad dzieckiem. Wstrząsające nagranie. Pobrano z: <https://wiadomosci.onet.pl/slask/grupa-nastolatkow-znecala-sie-nad-dzieckiem-wstrzasajace-nagranie/010f1pm>.

⁴⁶ Ratajczak, A. (2023). Gnębili 9-letniego chłopca z Chorzowa, a filmy umieszczali w internecie. Ruszyła sprawa oprawców Alanka. Pobrano z: <https://www.fakt.pl/wydarzenia/polska/slask/chorzow-znecali-sie-nad-9-letnim-alankiem-teraz-sad-sie-nimi-zajmuje/mtv4wtj>.

In the novel, as the plot unfolded, some of the boys realised the seriousness of the situation and sought adults' support. The 9-year-old child was attacked by older children, aged 13-14. The autistic disorder and age mean that, in a confrontation with a group of attackers, the boy had no chance to defend himself. The same thing happened with the protagonists. The literary characters had medical issues, were physically weaker, and therefore had no leverage over his main bully- Jack.

In *Thoughts on narcissism and narcissistic rage*, Heinz Kohut, echoing Freud's psychoanalytic view on early childhood development, stated that mother's (or other primary caregiver's) recognition, and compassionate understanding of the child's emotions are crucial in overcoming "archaic narcissistic cathexis".⁴⁷ The author claimed that, basing on Freudian theory, every child is self-centered at the very young age and their narcissism is an ordinary constituent of growth. In order to outgrow this immature self- focus, the child needs the *mirroring* responses i.e. admiration for particular actions, approval and validation, provided by their mother. If the child does not receive those, their transformation is disordered and their cohesive sense of self is unstable.⁴⁸ Adult supervision and presence in the early formative stages of human development therefore appears to be essential. However, this is not always the case as evidenced by further similarities observed between the novel's characters and contemporary children in this area as well. In *Lord of the Flies*, the boys are deprived of any adult care and supervision. At first, this pleases them because they will enjoy themselves until they are returned to adult care.⁴⁹ Over time, however, the darkness and danger make them want to return home at all costs.⁵⁰ The boys, left on their own, move on to horrible acts, full of brutality, fierceness and hatred. The data clearly shows that insufficient or no parenting at all results in increased delinquency among minors. Children, as already mentioned, need to be noticed and appreciated. If they are emotionally neglected by their parents, their perception will also be disturbed and they will allow themselves to become more and more radical, lead to often unnecessary confrontations and put themselves and others in danger.⁵¹ Nowadays, some parents try to replace being present, supportive and attentive towards their children with material things. Some provide for them but do not raise them. All this has far-reaching consequences, affecting the whole society.

As I provided the similarities between the plot and the contemporary times, it is important to acknowledge the subtle difference between the protagonists and

⁴⁷ Kohut, H. (1972). *Thoughts on Narcissism & Narcissistic Rage. The Psychoanalytic Study of the Child*. Vol. 27, Issue 1. New York, Quadrangle Books.

⁴⁸ Ibidem, p. 373.

⁴⁹ Golding, W., p. 35.

⁵⁰ Ibidem, p. 157.

⁵¹ Business Bliss Consultants FZE. (2018). *Is Poor Parenting the Main Cause for Youth Criminality?* Pobrano z: <https://ukdiss.com/examples/parenting-impact-youth-criminality.php?vref=1>.

modern times. Nowadays, most children and young teenagers do not run around with sharp sticks or such primitive tools. They now use more sophisticated forms of violence as relational violence is most prevalent: exclusion from class, backbiting, damaging reputations, isolating, and ignoring. It was no different in the novel either. The stronger boys made fun of Piggy's illness and mocked the island's youngest residents and their fear of the beast.

Although the main focus of this paper is the juxtaposition of the novel's plot and the contemporary examples of juvenile brutality, it is worth analysing the linguistic and aesthetic aspects of the discussed literary work, especially in comparison with the style of modern press articles. *Lord of the Flies* stands out for its remarkable linguistic richness; through the use of metaphors, symbols, and allegories, the author infused the work with an incredibly artistic, universal, and parable-like quality. As stated previously, Golding was inspired by Ballantyne's novel *The Coral Island* and Stevenson's *Treasure Island*. In his work, the Nobel Prize winner evoked the tranquil island atmosphere, vividly depicting the beauty of the new surroundings:

roughly boat-shaped: humped near this end with behind them the jumbled descent to the shore. On either side rocks, cliffs, tree-tops and a steep slope: forward there, the length of the boat, a tamer descent, tree-clad, with hints of pink; and then the jungly flat of the island, dense green, but drawn at the end to a pink tail.⁵²

Security provided by numerous palm trees, a small lake that reminds the boys of "a huge bath"⁵³, warm sand, coral reefs, lush vegetation, the explosion of colours, scents, and shapes enrapture the boys; Ralph himself states that it must have been "some act of God".⁵⁴ The closeness to nature and the omnipresent aura of serenity soothe the nerves. The island gives the impression of harmony and balance, which, as stated by David Wilson, may recall the Garden of Eden.⁵⁵ It is hardly unexpected, as Golding incorporated numerous references to biblical motifs and imagery. In *Lord of the Flies*, the author presented the frailty of human nature, which constantly demands more, even at the expense of peace and morality. Just like Adam and Eve lost their innocence, Golding's characters gradually descended to the abyss of darkness and savagery. This transformation is described in great detail, as the author depicted the various feelings that accompanied the boys. Littluns "suffered untold terrors in the dark and huddled together for

⁵² Golding, W., p. 26.

⁵³ Ibidem, p. 7.

⁵⁴ Ibidem.

⁵⁵ Wilson, D., *A Study on the reflection of Biblical characters and concepts in Lord of the Flies*. 2014. IMPACT: International Journal of Research in Humanities, Arts and Literature, Vol. 2, Issue 5 179-183.

comfort”⁵⁶, Ralph noticed that “things are breaking up”⁵⁷, and eventually he wept for the end of innocence, the darkness of man’s heart, and the fall through the air of the true, wise friend called Piggy⁵⁸.

These passages reveal the artistic values of the novel’s language, which focuses on conveying deep emotions.

The boys’ internal battles are reflected and reinforced by the changing reality. The island, once peaceful and safe, is now a hell-like place of entrapment and danger, as the silence of the “forest was savage with smoke and flame”⁵⁹, the darkness was “more oppressive than the heat”⁶⁰ and the trees seemed to be “too dark and tangled”.⁶¹ At the end of the plot, the island was “scorched up like dead wood”,⁶² which is an exceptionally vivid example of the illustrative tone of the novel. The isle, plunged into utter chaos, spreading fire, suffocating smoke, resembles the circles of hell; an inferno of their own creation. The desperate attempts to survive are accentuated by a picturesque narrative, stating that the “darkness was full of claws, full of the awful unknown and menace”.⁶³ Such a metaphor is exceptionally powerful and invites critical reflection on the scale of childish evil. Initially surrounded by beauty and serenity, the boys are ultimately ensnared by it. The characters’ inceptive sense of freedom and merriness gradually converts into a profound struggle against their own weaknesses, one another, and fear that becomes an inseparable companion of everyday life. This all-consuming, overwhelming trepidation eventually gives rise to the cult of the beast. The pig’s head impaled on a stick emerges as one of the novel’s most significant and haunting symbols. While presenting the scale of cruelty, Golding employed richly descriptive, meticulously detailed imagery to immerse the reader in the characters’ behaviour, their actions, and responses. One may hardly argue that there is anything more explicative than the sow’s carcass mounted on a stick, which the boys venerate out of terror.

The titular Lord of the Flies is not the only symbol used by the English writer. Aforementioned conch, as it was used to “call the others. Have a meeting”⁶⁴, is a representation of order, rules, and structure. It symbolises the continuity of moral behaviour, and its destruction equals the annihilation of humanity—a concept that some individuals persistently fought for. This stance is embodied

⁵⁶ Golding, W., p. 61.

⁵⁷ Ibidem, p. 87.

⁵⁸ Ibidem, p. 225.

⁵⁹ Ibidem, p. 44.

⁶⁰ Ibidem, p. 49.

⁶¹ Ibidem, p. 148.

⁶² Ibidem, p. 224.

⁶³ Ibidem, p. 107.

⁶⁴ Ibidem, p. 12.

in Piggy, whose “thick spectacles”⁶⁵ represent wisdom, intelligence and rational hope. Through those glasses, the author emphasised the importance of rationality and cooperation. It is also worth noting that Piggy is the only character known by a dreadful nickname he despises. The absence of his real name symbolically strips him of individuality and dignity; it reflects the dehumanisation that echoes in contemporary society, where victims of peer violence suffer the same fate- often reduced to nameless statistics within media narratives and unwilling figures in the videos of their own assault. In the novel, the most descriptive example of such bloody, cruel encounters is the brutal murder of Simon. The boy, whose character reminds one of Jesus Christ, is an innocent individual who is murdered for bringing the truth. The depiction of the fanatical frenzy, the encirclement of the victim, and the merciless, senseless act of violence is intensified by the changing nature, which emerges as a silent yet significant participant in the narrative. In these dramatic circumstances, “the dark sky was shattered by a blue-white scar. An instant later the noise was on them like the blow of a gigantic whip”.⁶⁶ This thunderstorm during Simon’s death recalls divine retribution, punishment after such a crime, but also a symbolic ablution after the crime. Golding continually provided expressive metaphors to amplify the depth and intention of his work, often enhancing the boys’ sinister actions and the consequences of perpetrated evil. To portray the magnitude of Jack’s horrendous actions, the author employed highly evocative language. When preparing his weapon, Merridew’s “laughter became a bloodthirsty snarling”⁶⁷, and later, in almost ritualistic manner, he:

made one cheek and one eye-socket white, then he rubbed red over the other half of his face and slashed a black bar of charcoal across from right ear to left jaw.⁶⁸

Such a powerful depiction of dividing his face has yet another symbolic meaning- abandoning the civilised part and transforming into a gruesome, relentless oppressor. With his behaviour and image, Jack looks like a primitive chief who “painted and garlanded, sat there like an idol”.⁶⁹ The other boys, intimidated by his volatile behaviour and impulsive reactions, feared him. Merridew skilfully capitalised on this, shaping his status out of their fear.

The novel is also rich in allusions and references to the realities of the time known to the author, i.e., the post-war period. Therefore, the choirboys may be understood as an allusion to fascist youth groups that emerged during World War II. The choristers march in step, are obedient, and uniform. There is a noticeable

⁶⁵ Ibidem, p. 2.

⁶⁶ Ibidem, p. 168.

⁶⁷ Ibidem, p. 66.

⁶⁸ Ibidem.

⁶⁹ Ibidem, p. 164.

hierarchical order and sense of loyalty towards Jack. The choirboys, just like the aforesaid fascist organisations, exemplified physical superiority, compliance, and unwavering ideological fervency. The whole plot is an allegory of greedy, envious human nature, the most primal instincts and, consequently, the fall of civilisation and the breakdown of society.

Golding's prose is incredibly evocative, capable of eliciting emotional responses and vividly engaging the reader's imagination. His dynamic portrayal of the natural environment, rich description, and numerous metaphors appeal directly to the senses and enable the audience to visualise the unfolding events with greater clarity. By endowing ordinary objects such as the conch or Piggy's glasses and giving them symbolic meanings, Golding emphasised the multidimensionality of the narrative and deepened its artistic impact. *Lord of the Flies'* allegorical, almost parabolic quality underscores the gravity of its main concerns, while the subtle references to the Second World War highlight the idea that every individual confronts internal battles- some more violent than others- yet the problem of emerging evil, particularly among the youth, remains a persistent and unsettling reality.

The island's serene atmosphere stands in clear opposition to the brief, perfunctory depictions of crime scenes that characterise contemporary press reports. When conveying the details of the brutal assault in Zamość, which I recalled above, the journalist reported that it was:

broad daylight, afternoon, a park in the Planty housing estate, only a few hundred metres from the market square.⁷⁰

The full extent of the attack is put in a few simple, emotionless words: "the boy died".⁷¹ In the other case I have discussed, the author stated that:

sixteen-year-old Kuba was killed on Friday, 10 May, following a knife assault by a fellow student at Król Maciuś I School in Warsaw's Wawer.⁷²

Long gone are the highly depictive images that the reader encounters in *Lord of the Flies*; no metaphors, allegories, symbols- just facts. Contemporary newspaper and online reports, despite addressing cases of severe and senseless violence, tend to implement a laconic, highly factual, documentary style of coverage. The newscasters restrict themselves to the main journalistic questions of who, when, where, what, and why. In opposition to Golding's impactful and detailed prose, modern reportage employs detached, emotionless language. One may argue that these descriptions lack a human dimension, favouring data,

⁷⁰ Czuma, B., 2023.

⁷¹ Ibidem.

⁷² Gołdyn, D., 2019.

figures, charts, and statistics over emotional resonance. Literature, on the other hand, seeks to engage its readers, encouraging reflection and depicting, often with striking clarity, that the situations presented in fiction frequently echo those found in everyday life.

Conclusion

While reading about the brutal behaviour of the novel's characters, one might conclude that the world of literary fiction has nothing to do with reality, but this is not true. Although the novel was written 70 years ago, its plot is still relevant today, as can be seen through the presentism. The patterns of young people's actions have not changed, the struggle for dominance is still noticeable. Incessant acts of aggression, both verbal and non-verbal, unfortunately often result in death or serious damage to physical and mental health. It is striking that both the perpetrators of literary protagonists and the victims of contemporary tragedies are people close and well known to them. We are surrounded by people embodying the traits of the novel's protagonists. We are surrounded by passive observers, aggressors, and victims. We are surrounded by Ralphs, Jacks, and Piggies. I would like to conclude with a quote from the novel:

Maybe there is a beast ... maybe it's only us.⁷³

To echo Freud, will we, like Piggy, strive to preserve our ideals while exposing ourselves to attack? Will we, like Ralph, fight our instincts or give them vent like Jack? We do not have a say in the course of events in the novel, but we do have a say in reality, and it is up to us which *Lord of the Flies* character we identify with.

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⁷³ Golding, W., p. 95.

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THE SO-CALLED *DARK AGES* OF ENGLISH LITERATURE: A LITERARY ANALYSIS IN HISTORICAL CONTEXT

Abstract: The *Dark Ages*, a period in English literary history often dismissed as obscure or unimportant, continue to generate considerable scholarly debate. The main reason for this ongoing uncertainty is the lack of reliable historical, linguistic, and textual evidence that can be critically analysed and interpreted. Nevertheless, this article contends that the period merits serious examination. Beginning with historical and archaeological contexts to establish the material foundations of the era, this research then focuses on literary inquiry regarding the *Dark Ages* with special note to the way Christian ideology integrates with pre-Christian beliefs in anonymously written literature. Using a wealth of scholarship along with the study of cultural artifacts, this research seeks to place early medieval literature within the living experience of the authors. By comparative examination of excavations at Bamburgh Castle and the investigation of Anglo-Saxon helmets and Roman body armour, followed by analysis of key literary works, this research examines the interface of material culture with textual traditions, illuminating identity and continuity. Overall, this article provides a short, accessible introduction to the British *Dark Ages*, combining archaeological, historical, and literary evidence to give a richer insight into the cultural significance of the period.

Keywords: *Dark Ages*, Literature, Archaeology, Religion, Material Culture.

Streszczenie: *Wieki Ciemne*, okres w historii literatury angielskiej często bagatelizowany jako mało znany lub nieistotny, wciąż wywołują ożywioną debatę naukową. Główną przyczyną tej niepewności jest brak wiarygodnych dowodów historycznych, językowych i tekstowych, które można poddać krytycznej analizie i interpretacji. Niniejszy artykuł dowodzi jednak, że okres ten zasługuje na poważne badania. Rozpoczynając od kontekstów historycznych i archeologicznych, aby ustalić materialne uwarunkowania epoki, praca ta następnie koncentruje się na

analizie literackiej *Wieków Ciemnych*, ze szczególnym uwzględnieniem sposobów, w jakie ideologia chrześcijańska splata się z wierzeniami przedchrześcijańskimi w anonimowej literaturze. Wykorzystując bogate zaplecze naukowe oraz analizę artefaktów kulturowych, badania te starają się umiejscowić literaturę wczesnośredniowieczną w żywym doświadczeniu jej autorów. Poprzez porównawczą analizę wykopalisk na zamku Bamburgh oraz studium anglosaskich hełmów i rzymskich pancerzy, a następnie interpretację kluczowych dzieł literackich, artykuł bada relacje między kulturą materialną a tradycjami tekstowymi, rzucając światło na kwestie tożsamości i ciągłości. Całość stanowi krótkie i przystępne wprowadzenie do brytyjskich *Wieków Ciemnych*, łącząc dane archeologiczne, historyczne i literackie, aby ukazać kulturowe znaczenie tego okresu.

Słowa kluczowe: *Wieki Ciemne*, Literatura, Archeologia, Religia, Kultura materialna.

Introduction

Our understanding of the *Dark Ages* is still characterised by uncertainty and hampered by a lack of concrete evidence. Literary works, legends, and oral traditions – many of which were written down much later – serve as primary sources of knowledge about this enigmatic period. Academics such as R.G. Collingwood¹ stress that most of the information that exists about the *Dark Ages* is not only subjective but also incomplete and needs to undergo cautious synthesis of narrative and material data. More recently, writers have endeavoured to close the gap between textual sources and the material record. Higham and Ryan² observe that combining literature and artifacts can generate a more subtle knowledge about the era.

This article begins by defining the historical parameters of the *Dark Ages* before examining the material and archaeological contexts that shaped daily life and cultural identity during this period. It explores the architectural and settlement evidence that provides insight into social organization, defence, and community life, while there follows an investigation into the symbolic and aesthetic dimensions of Anglo-Saxon culture through material artifacts. These foundational sections establish the lived reality of the era before turning to literary analysis. The article then examines literary research, highlighting the role played by early books influenced by pagan culture, religious doctrine, anonymity of the authors, and the transition from oral to written culture. These literary findings are thus grounded in the material culture they emerged from, showing how cultural identity was portrayed and kept intact throughout this developmental phase. Given the circumstances, the paper emphasises the importance of interdisciplinary methods in enhancing the study of the *Dark Ages* in English literary heritage.

¹ Collingwood, R. G., (1949), *The idea of history*, Oxford: Oxford University Press.

² Higham, N.J., & Ryan, M.J., (2013), *The Anglo-Saxon world*, New Haven, CT & London: Yale University Press.

Defining the period of the *Dark Ages*

Most people agree that the *Dark Ages* started in 410 AD when the Romans left Britain, marking the end of Roman power and a notable change in the political and cultural landscape of Europe.³ Emperor Claudius established the Roman presence in 43 AD. His war, justified by the banishment of Verica, a pro-Roman king, served to strengthen imperial control.⁴ However, this domination was short-lived, as the fall of Roman control in Britain signalled the start of the so-called *Dark Ages*, a period of division and change.⁵

As the empire faced a shortage of legionaries and deepening instability, troops were recalled to protect Rome's core.⁶ Despite this retreat, Rome left enduring legacies in Britain, including roads, governance, and technology.⁷ The Britons, now autonomous, faced challenges in defence and self-governance.⁸

When Roman rule ended, Britain was left exposed. By the year 500 AD, northern Picts and western Irish attacks had followed the advent of Germanic tribes such as the Angles and Saxons.⁹ The idea that there were significant cultural and demographic changes during this time period is supported by archaeological data¹⁰; nonetheless, Dark¹¹ highlights how these migrations changed established societies rather than destroyed them.

Christianity expanded throughout the sixth century thanks to Roman and Irish missionaries, fostering artistic and cultural innovation.¹² This cultural growth was disrupted by increased Viking attacks about 790 AD. Mercia and East Anglia were ravaged by 865 AD, leaving Wessex as the final stronghold.¹³

The battle at Edington in 878 AD proved decisive as Alfred of Wessex defeated Guthrum, resulting in a treaty that divided England. This established Danelaw to the north and east, and Wessex to the south.¹⁴ In the 910s, Edward the Elder and Æthelflæd

³ Wickham, C., (2005), *Framing the early Middle Ages: Europe and the Mediterranean, 400-800*, Oxford: Oxford University Press.

⁴ Collingwood, R.G., op. cit. Also, Higham, N. J., & Ryan, M. J., op. cit.

⁵ Mommsen, T.E., (1942), Petrarch's conception of the Dark Ages, "Speculum", 17(2), pp. 226-242.

⁶ Hodges, R., (1998), The not-so-dark ages, "Archaeology", 51(5), 61-65.

⁷ Mommsen, T. E., op. cit.

⁸ S. B., (1930), Art of the Dark Ages, "The American Magazine of Art", 21(9), 538-539.

⁹ Snyder, C. A., (2003), *The Britons*, Malden, MA: Blackwell Publishing.

¹⁰ Higham, N. J., (1992), *Rome, Britain and the Anglo-Saxons*, London: B.A. Seaby Ltd.

¹¹ Dark, K., (2000), *Britain and the End of the Roman Empire*, Stroud: Tempus Publishing.

¹² Brown, Peter, (1989), *The Rise of Western Christendom: Triumph and diversity, AD 200-1000*, Oxford: Blackwell Publishing.

¹³ Sawyer, P.H., (1975), *Age of the Vikings*, London: Hodder & Stoughton Educational.

¹⁴ Keynes, S., (1997), *The Vikings in England: c. 790-1016*, in P. Sawyer (Ed.), *The Oxford illustrated history of the Vikings (48-82)*, Oxford: Oxford University Press.

fought to reclaim lost territory and eventually restore the lands south of the Humber. Æthelstan completed the unification and became known as "ruler of all Britain."¹⁵

However, in the 980s, new Viking invasions overwhelmed King Æthelred II, who paid Danegeld to appease the invaders, losing important territories in the process.¹⁶ The struggle for control ended in 1066 at Hastings, where Harold Godwinson was killed and the Normans were victorious – the end of the Anglo-Saxon era.¹⁷

Referring to the American Cyclopaedia of 1833, Theodor Mommsen defined the *Dark Ages* as a period of "intellectual depression" following barbarian control.¹⁸ Although this view reflects certain historical facts, it fails to recognise the resilience of the people and the continuity of their culture. Tristan Hughes¹⁹ argues that *Dark Ages* implies cultural stagnation, a view still disputed due to limited evidence, and that it is more a psychological invention than a historical reality.

The terms *Dark Ages* and *Middle Ages* are often used interchangeably, although some, such as Mommsen, argue in favour of a distinction – they see the *Dark Ages* as a precursor to the Middle Ages, which began in 1066.²⁰ Ker²¹ also noted that the literary values of the two periods overlapped, particularly in the depiction of kingship and ideals such as honour and faith.

Building Britain Anew

Understanding literary works from the so-called *Dark Ages*, such as *Sir Gawain and the Green Knight* and *Beowulf*, requires examining historical and archaeological evidence, which reveals the material conditions and social patterns that shaped the imaginative worlds of these texts. The landscapes, buildings, and everyday objects of the period offer a tangible context for how these narratives were created and transmitted, and Richard Hodges²² argued that although the fall of the Roman Empire was highly disruptive for European society, it did not lead to its total collapse. Similarly, Peter Brown²³ had earlier pointed out that many Roman achievements– such as road systems

¹⁵ Keynes, S., (1999), Æthelstan, in M. Lapidge, J. Blair, S. Keynes, & D. Scragg (Eds.), *The Blackwell encyclopaedia of Anglo-Saxon England* (56-58), Chichester: Wiley-Blackwell.

¹⁶ Sawyer, P.H., op. cit.

¹⁷ Douglas, D. C., (1964), *William the Conqueror: The Norman impact upon England*, Berkeley and Los Angeles: University of California Press.

¹⁸ Mommsen, op cit., p. 226.

¹⁹ Hughes, T., (2023), *Why was 900 years of European history called 'The Dark Ages'*, *History Hit*, retrieved from <https://www.historyhit.com/why-were-the-early-middle-ages-called-the-dark-ages/>.

²⁰ Ibid., p. 226.

²¹ Ker, W. P., (1904), *The Dark Ages*, Volume II of *Periods of European Literature*, William Edinburgh and London: Blackwood & Sons.

²² Hodges, R., (1989), *The Anglo-Saxon achievement: Archaeology and the beginnings of English Society*, Ithaca, NY: Cornell University Press.

²³ Brown, Peter, (1971), *The world of late antiquity: From Marcus Aurelius to Muhammad*,

and administrative structures – continued to function and were adapted for new purposes. Hodges also noted that, despite the violence of Viking raids, these encounters encouraged cultural contact and innovation in areas such as trade, building techniques, and community organisation.²⁴ Supporting this argument, Hodges later referred to Herbert Jankuhn's research, which demonstrated that active trade networks in the ninth century linked Carolingian, Slavic, and Viking merchants.²⁵

Because of the lack of written records, archaeology is essential for understanding this period. Excavations at Hamwic have revealed structures such as storage buildings and halls, although Hodges²⁶ recognises that early interpretations have since been revised. An example of early Christian architecture that may reflect monastic life and marine symbolism is the Oratory of Gallarus, a religious structure on the Dingle Peninsula that dates from the fifth to the eighth century.²⁷

Simple wooden churches, sometimes reinforced with concrete, were a hallmark of Anglo-Saxon architecture. Structures evolved over time to meet the needs of defence and aesthetic taste.²⁸ Robin Page²⁹ notes that nobles resided in halls, which may have had raised floors, while ordinary pit houses served as agricultural dwellings, storage, and housing. Defence ditches or 'burhs' and timber walls were the cornerstones of the defences.³⁰

Bamburgh Castle was a key centre of royal power. Excavations by Brian Hope-Taylor and later Graeme Young uncovered artifacts including a throne arm, graves, and coins associated with Aethelred II.³¹ Evidence of meat-heavy diets, domestic spaces, and polished pathways highlights daily life. Symbolic items like the gift-throne reaffirmed warrior-lord bonds and social hierarchy.

In short, the architecture of the *Dark Ages* points to a time of cultural exchange, a lack of building materials and a focus on buildings that fulfil their purpose. Although the villages were plain in everyday life, places where kings lived, such

London: Thames and Hudson.

²⁴ Ibid., pp. 153-155.

²⁵ Hodges, R., op. cit., 1998, p. 61.

²⁶ Hodges, R., op. cit., 1989, pp. 80-92, p. 172.

²⁷ Ó Carragáin, T. (2010), *Churches in early medieval Ireland: Architecture, ritual and memory*, New Haven, CT: Yale University Press; Harbison, P., (1992), *Pilgrimage in Ireland: The Monuments and the People*, Syracuse, NY: Syracuse University Press.

²⁸ Hamerow, H., (2002), *Early medieval settlements: The archaeology of rural communities in northwest Europe, 400-900*, Oxford: Oxford University Press.

²⁹ Page, R., (2022), *Anglo-Saxon Architecture: Understated Jewels of England's Heritage*, retrieved from <https://heritagecalling.com/2022/02/08/anglo-saxon-architecture-understated-jewels-of-englands-heritage/>.

³⁰ Hamerow, H., op. cit.

³¹ Powell, E. A., (2016), *Letter from England: Stronghold of the kings in the north*, *Archaeology Magazine*, retrieved from <https://archaeology.org/issues/july-august-2016/letters-from/stronghold-of-the-kings-in-the-north/>.

as Bamburgh, give us a better idea of the political control, craftsmanship and social life during this period of growth.

Artwork and Tribal Designs

Following on from the architectural and material evidence that framed everyday life in the *Dark Ages*, it is also important to consider the symbolic and aesthetic dimensions of Anglo-Saxon culture as expressed in the surviving artworks and tribal designs before examining how these visual and material traditions informed the literary imagination of the period. Much of the original artwork has been lost, but what remains – particularly metalwork, weaponry, and ornamentation – is evidence of a rich visual tradition.³² Despite their limited skills in stone construction, the Anglo-Saxons excelled in the production of armour, jewellery and ceremonial objects, many of which have their roots in Germanic styles and were later influenced by Christian iconography, giving rise to the Hiberno-Saxon style.³³

An outstanding example is the helmet from Sutton Hoo, which was reconstructed from fragmentary remains and is now in the British Museum.³⁴ Its decorative features include gold and iron elements, inlaid rubies, and stylised dragon imagery – eyebrows as wings, a nose forming the body and a tail-shaped mouth.³⁵ It was used both as actual armour to wear in fights and as a formal crown for important events. The sides could move, but the back was solid and protected well. The designs etched on it, as noted by Webster and Backhouse³⁶, depicted old tales and warfare, which were key parts of Anglo-Saxon culture.

The Sutton Hoo helmets, and Roman army helmets had some noticeable things in common, like the cheek guards and the neck protection. This makes it seem like Anglo-Saxon armour makers might have taken some design ideas from the Romans. Roman shields were usually plain and practical, mainly used to show who was in charge. This was different from Anglo-Saxon helmets, which were known for their detailed and decorative artwork.³⁷ This contrast demonstrates how the Anglo-Saxon emphasis on symbolic and ceremonial values replaced the Roman military's utilitarian approach.

³² Dodwell, C. R., (1982), *Anglo-Saxon art: A new perspective*, Manchester: Manchester University Press.

³³ Wilson, D. M., (1984), *Anglo-Saxon art: From the seventh century to the Norman conquest*, London: British Museum Publications; Coatsworth, E., & Pinder, M., (2002), *The art of the Anglo-Saxon goldsmith: Fine Metalwork in Anglo-Saxon England: Its practice and practitioners*, Martlesham, Suffolk: Boydell Press.

³⁴ Bruce-Mitford, R. L. S., (1978), *The Sutton Hoo Ship-Burial: Volume 2 Arms and Armour and Regalia*, London: British Museum Press.

³⁵ Evans, A. C., (1986), *The Sutton Hoo ship burial*, London: British Museum Press.

³⁶ Webster, L., & Backhouse, J., (1991), *The making of England: Anglo-Saxon art and culture, AD 600-900*, London: British Museum Press.

³⁷ Cowan, R., (2003), *Roman Legionary 58 BC-AD 69*, London: Bloomsbury Publishing.

Roman influences are visible in elements such as protective side panels and neck guards, but Anglo-Saxon helmets favoured ornate designs over Roman utilitarianism, highlighting their symbolic role.³⁸ Anglo-Saxon armour – composed of chain mail, layered textiles, and broad rings – was heavier and more protective than Roman gear, which often left limbs exposed. This contrast reflects differing climates, tactics, and cultural values.³⁹

The footwear and clothing of Anglo-Saxon soldiers was tailored for mobility, with leather shoes tied tightly at the ankles and trousers fastened at the knees, in contrast to the lighter armour of the Romans, which was designed for warmer climates.⁴⁰ These differences emphasise how geography, climate and cultural priorities influenced military dress in the ancient world.

Dark Ages Literature

The literature from the so-called *Dark Ages* is usually referred to as *Medieval Literature*. According to Joshua J. Mark, “Medieval Literature is broadly defined as any work written in Latin or the vernacular between c. 476-1500.”⁴¹ However, from the eighth century into the late ninth century, writing in local languages began to increase in Britain. This occurred because people wanted texts to be more accessible. Most of the population was illiterate and did not know Latin, so they relied on oral stories or writings in their own language.⁴² Literacy was rare – only one or two people in a village could read, and even fewer could understand Latin.⁴³ For this reason, the transmission of laws, moral lessons, and stories depended on the use of local languages. This linguistic change was dynamic and developed significantly over time. Mark⁴⁴ explains that the Norman Conquest of 1066 caused English to change from Old English (c. 500-1100) to Middle English (c. 1100-1500). As a result, French became the main language of literature. This important change in English literary history led to a more diverse and accessible literary culture.

Two poems that most strongly epitomise the values and concerns of the era are *Sir Gawain and the Green Knight* and *Beowulf*. Both show a cultural consciousness of changing moral ideals, religious syncretism and changing social structures. Simon

³⁸ Ibid.

³⁹ Härke, H., (1990), “Warrior graves”? *The background of the Anglo-Saxon weapon burial rite*, “*Past & Present*”, 126(1), pp. 22-43.

⁴⁰ Cowan, R., op. cit.

⁴¹ Mark, J. J., (2023), *Medieval literature*, *World History Encyclopedia*. Retrieved from https://www.worldhistory.org/Medieval_Literature/

⁴² Barber, C., Beal, J. C., & Shaw, P. A., (2009), *The English language: A historical introduction* (2nd ed.), Cambridge: Cambridge University Press.

⁴³ Clanchy, M. T., (2012), *From Memory to Written Record: England 1066-1307* (3rd ed.), Chichester: Wiley-Blackwell.

⁴⁴ Mark, J.J., op. cit.

Armitage's translation⁴⁵ of *Sir Gawain and the Green Knight* captures the chivalric and religious subtleties of the poem beautifully. The poem becomes a tapestry of mediaeval idealism, blending Christian ethics with pagan motifs. Although the text is deeply rooted in Christian allegory, it draws extensively from earlier oral and mythical traditions. This fusion highlights the transitional character of the Middle Ages, during which Christian values were imposed upon pre-Christian cultural forms. The poem's anonymous authorship, which shows that it came from oral traditions, also shows that early medieval literature was communal and always changing.

Additionally, *Sir Gawain and the Green Knight* exemplifies the core values of medieval chivalry through its exploration of valour, moral virtue, and spiritual integrity. Armitage elegantly underscores these ideals, especially in Gawain's choice to confront the Green Knight: "Such foolish business is unfit for a king, / So it should fall to me who first came forth."⁴⁶ This action exemplifies the chivalric virtues of courage, humility, and loyalty, aligning with Kaeuper's⁴⁷ claim that the knight functions as both a combatant and a moral model.

The symbolism of the poem emphasises this moral framework. The golden pentagon on Gawain's shield represents the five chivalric virtues – generosity, comradeship, chastity, courtesy, and piety⁴⁸ – and links these qualities to Christian symbolism. Armitage describes it as "the shining scarlet shield / with its pentagon painted in pure gold", "a sign of fidelity."⁴⁹ It also refers to the five wounds of Christ and emphasises the synthesis of martial and spiritual ideals that are central to the chivalric code.

Gawain's deep faith is clear in his actions. Just before his crucial trial, he goes straight to the chapel, privately asks a priest to hear his confession, and shows his wish to cleanse his soul.⁵⁰ He even prays for help, saying, "May Mother Mary lead him / To a house or place of refuge."⁵¹ These moments underline that religious duty was at the heart of medieval heroism.⁵²

Beowulf, too, stands as a leading example of early medieval literature and reflects the linguistic and thematic contrasts of the so-called *Dark Ages*. As Seamus Heaney

⁴⁵ Armitage, S., (Trans.), (2007), *Sir Gawain and the Green Knight*, New York: W.W. Norton & Company.

⁴⁶ Ibid., p. 43.

⁴⁷ Kaeuper, R. W., (2001), *Chivalry and Violence in Medieval Europe*, Oxford: Oxford University Press.

⁴⁸ For a further discussion of these knighthood virtues see L.D. Benson, (1965), *Art and Tradition in Sir Gawain and the Green Knight*, New Brunswick, NJ, Rutgers University Press.

⁴⁹ Armitage, S., op. cit., p.63.

⁵⁰ Ibid., p. 145.

⁵¹ Ibid., p. 71.

⁵² For a detailed discussion of the juxtaposition of pagan and Christian elements in the poem, highlighting its complex religious landscape, see M. Schoket, (2013), *Supplanting dominance: Religion dynamics in Sir Gawain and the Green Knight*, Academia.edu.

points out, although the poem was written between the seventh and tenth centuries, its rhythmic, alliterative lines – “Thus / the spear-danes in days gone by / and the kings who ruled them had valour and greatness”⁵³ – reveal its oral storytelling roots. This style made it perfect for being passed down by word of mouth and helped strengthen its communal role.

Beowulf is one of the most representative works of the Old English language, resembling in its traditional and defining Germanic manner with strong borrowings from early German and Latin alike. This also applies to the heroic tone, which is well expressed in the following lines describing Beowulf's strength: “All knew of my fearsome strength, / They had seen me bedded in the blood of my foes, / When I fought with five beasts and bound them.”⁵⁴

The Germanic origins of the poem are also reflected in the alliterative structure and the frequent use of compound words or kennings, characteristic features of Old English poetry.⁵⁵ The king is then referred to as a “ring-giver,”⁵⁶ emphasising the king's generosity and his role as patron. This one phrase carries the full weight of this king's power and responsibility to his people and furthers the characterisation of this ruler. The term “bone house”⁵⁷ used to describe a ship makes it a metaphorical home and stresses its purpose, which is literally to be a “resting place” for the dead. Franz Klaeber⁵⁸ posits that this specific language not only underscores the Germanic origins of the narrative but also accentuates the cultural values of courage and resilience that form the foundation of the heroic ethos.

Beowulf, like *Sir Gawain and the Green Knight*, blends Christian and pagan ideas, especially regarding fate and divine will. Beowulf's statement, “Fate goes as fate must,”⁵⁹ shows that he still believes in fate, even though parts of the poem refer to God's providence. Roy M. Liuzza⁶⁰ notes that this combination of systems is characteristic of early medieval literature, in which pagan motifs were often incorporated into Christian narratives to preserve cultural significance.

In both *Sir Gawain and the Green Knight* and *Beowulf*, true honour is shown through hardship and humility. This is a theme that is especially important to both the literature and spirituality of the *Dark Ages*.⁶¹ Rather than celebrating

⁵³ Heaney, S., (Trans.), (1999), *Beowulf: A New Verse Translation*, New York: Faber & Faber, p. 3.

⁵⁴ Ibid., p. 29.

⁵⁵ Mitchell, B., & Robinson, F. C., (2012), *A guide to Old English* (8th ed.), Chichester: Wiley-Blackwell.

⁵⁶ Heaney, S., op.cit.

⁵⁷ Ibid.

⁵⁸ Klaeber, F., (1950), *Beowulf and the fight at Finnsburg*, Boston, MA: D.C. Heath and Company.

⁵⁹ Heaney, S., op. cit., p.31.

⁶⁰ Liuzza, R. M., (2000), *Beowulf: A new verse translation*, Peterborough, ON: Broadview Press.

⁶¹ For an explanation on how early medieval Christianity looked to saints and saw suffering and humility as the true routes to honour, see Brown, P., (1981), *The Cult of the Saints*:

unblemished courage, these stories focus on the clash between moral ideals and human frailty. In *Sir Gawain and the Green Knight*, Gawain makes it through his encounter with the Green Knight but is shamed by breaking his promise when he accepts a gold-studded green belt to spare his life. In his confession – “thereby I suffered a scar on my skin; / for my loss of faith I was disfigured bodily; / what a covetous coward I became, it seems”⁶² – Gawain lays bare his inner battle between wanting to save himself and striving to uphold his virtue. It is significant that the court reinterprets the belt not as a symbol of dishonour, but as a symbol of unity and common human fallibility. The collective revision moves the moral centre of the poem from personal failure to communal understanding. Jane Gilbert sees Gawain's admission of error as a “topos of humility” for Arthur's court, showing that integrity and candour are essential chivalric qualities.⁶³ Dalicia Raymond⁶⁴ believes that the Green Knight's challenge also exposes Camelot's moral weaknesses. As a result, Gawain's quest serves as a ritual for the community, re-establishing a common ethical code and promoting humility.

The theme of humility shown through heroic decline in *Beowulf* fits with the dark, fatalistic mood of *Dark Ages* literature, where death is certain and earthly glory is short-lived. Beowulf's fight with the dragon at the end of the poem is not a victory; it is a very personal fight with death. His words – “I risked my life / when I was young. Now I am old, / but as king of the people I will continue this fight, / to win the glory of victory”⁶⁵ – reveal a warrior who of both his ancestry and his limits. The situation gains sad depth through the contrast between young courage and old-fashioned despondency. Beowulf fights to fulfil the responsibility of a king defending his subjects, even at the cost of his own life, and not to achieve personal glory. His death, which Wiglaf laments in the lament: “Now the day has come / when this lord we served needs healthy men / to support him,”⁶⁶ signals not only the fall of a hero, but also the disintegration of communal stability. This elegiac tone reflects the world view of the Dark Ages, according to which honour was to be found both in success and in the respectful acceptance of one's own fate. Here Beowulf becomes an embodiment of tragic nobility; his final act shows that true honour is to be found in early victories as well as later defeats. The article *Beowulf: The Monsters and the*

Its Rise and Function in Latin Christianity, Chicago, IL, University of Chicago Press.

⁶² Armitage, S., op. cit., pp. 187-188.

⁶³ Gilbert, J., (2009), *Arthurian ethics*, in E. Archibald & A. S. Putter (Eds.), *The Cambridge Companion to the Arthurian Legend* (153-168), Cambridge, UK: Cambridge University Press, p. 160.

⁶⁴ Raymond, D., (2021), *Journeying through (an) other world: Examining the role of magic and transformational otherness*, in M. P. Pytlik (Ed.), *Significant Others: Rethinking Gender and Magical Transformations in Medieval Literature* (37-58), New York, NY: Routledge.

⁶⁵ Heaney, S., op.cit., pp. 169-171.

⁶⁶ Ibid., p. 179.

Critics by JRR Tolkien, published in 1936, also supports this point of view. According to Tolkien, the true meaning of the poem lies in its reflection on moral strength and mortality and not in its depiction of valiant deeds. Tolkien believes that Beowulf's demise is "not a defeat, but the end of the hero" and demonstrates a greater form of triumph, one over fear and serving the cause of legacy.⁶⁷

The natural world as a spiritually charged and symbolic arena of trial and revelation is a theme of *Dark Ages* literature, powerfully reflected in *Sir Gawain the Green Knight* and *Beowulf*. Nature becomes more than just a backdrop in *Sir Gawain and the Green Knight*; it becomes an elemental force that symbolises the struggles of the soul. The harsh winter scenes – "Then a whipping wind whistles between the hills / And drives the snow into the valleys"⁶⁸ – not only cause discomfort, but also represent Gawain's inner struggle and the mediaeval notion of nature as a place of penitential metamorphosis and divine trial. The wilderness is morally significant and reflects the fallen world in which chivalric ideals are undermined by fear and temptation. Above all, the Green Chapel, which has grown out of the uncontrolled wilderness, functions as a threshold-less, almost otherworldly space. If there is no order in Camelot, it becomes a metaphysical threshold that goes against the principles of civilization and reveals basic truths about human weakness, honour, and God's judgment. In this place, the traits that make up a chivalric identity are not evident. The knight must deal with the spiritual doubts that exist outside of the world as it is.

In *Beowulf*, the natural world is more than just a background. It represents existential dread and cultural instability, two key themes in *Dark Ages* literature. The place where Grendel's mother lives is violent and dark: "That is no good place: / When wind blows up and stormy weather / makes clouds scud and the skies weep, / out of its depths a dirty surge / is pitched towards the heavens."⁶⁹ This image of dark oceans and shadowy depths evokes fear and the unknown, highlighting the contrast between chaos and order. The poem's ominous setting, with its deep, turbulent waves, clearly illustrates the distinction between civilisation and chaos. James W. Earl⁷⁰ asserts that this environment embodies cosmic chaos and eschatological turmoil, reflecting the poem's inherent spiritual essence. The dragon's lair, deep in the earth and filled with treasure, recalls the motif of death and the futility of material wealth: "How easily treasure / buried in the ground, gold hidden / however skilfully, can escape from any man!"⁷¹ According to Phyllis Brown,⁷² this image aligns with

⁶⁷ Tolkien, J. R. R., (2002), *Beowulf and the critics* (M. Drout, Ed.), Tempe, AZ: Arizona Center for Medieval and Renaissance Studies. (Original work published 1936).

⁶⁸ Armitage, S., op. cit., p.1 55.

⁶⁹ Heaney, S., op. cit., pp. 95-97.

⁷⁰ Earl, J. W., (1987), Transformation of chaos: Immanence and transcendence in *Beowulf* and other Old English poetry, "Ultimate Reality and Meaning", 10 (3), 164-185.

⁷¹ Heaney, S., op. cit., p. 187.

⁷² Brown, Phyllis, (2000), Cycles and change in *Beowulf*, in R. Boenig & K. Davis (Eds.),

the Christian apocalyptic perspective, which holds that material achievements are ultimately pointless in the face of divine judgement.

Sir Gawain and the Green Knight and *Beowulf* both deal with reputation and memory, which are important ideas in *Dark Ages* literature, where identity was shaped by both personal action and community stories. The events at the Green Chapel in *Sir Gawain and the Green Knight* change Gawain's identity for good. He wears the green girdle – "thereabouts he had bound the belt like a baldric / slantwise, as a sash, from shoulder to side, laced in a knot looped below his left arm, / a sign that his honour was stained by sin"⁷³ – as a public sign of his moral failure. Gawain thereby makes the shame a lasting moral reminder. His story, retold among the ranks of Round Table knights, enters into a common moral tradition. Memory, Mary Carruthers⁷⁴ contends, in medieval culture was not a mere repository of things past but an active instrument in the formation of moral consciousness. She refers to it as a "craft of thought" meant to condition behaviour through internal contemplation of exemplary examples. Gawain's narrative thus not just functions as a recollective memory, but as a didactic lesson reinforcing humility and self-knowledge. Memory thus plays an important function in the ethical and cultural discussion of early mediaeval literature in creating identity through the transmission of values and not just the celebration of heroism.

In *Beowulf*, the legacy is more than a point of narrative, but instead an obsessive force that embodies the spirit of *Dark Ages* literature, in which death and remembrance are in constant dialogue. Beowulf's deeds are characterized by a search for glory after death: "May he who can / win glory before death. When a warrior has died, / that will be his best and only bulwark."⁷⁵ His last command, to build a monument in his name, "will be spoken by sailors under sail / Beowulf's burial monument as they navigate / ships through the wide and veiled water"⁷⁶ – is characteristic of a culture in which memory had the function of material immortality. As J.R.R. Tolkien put it, *Beowulf* is not so much a story about monsters and kings, but poetry that explores the spirit's reaction to mortality within which the epic narrative has the function of philosophic reflection.⁷⁷ Roberta Frank⁷⁸ continues this view by saying that the poem's tone and form emphasize memory as mnemonic

Manuscript, narrative, lexicon: Essays on literary and cultural transmission in honor of Whitney F. Bolton (171-192), Lewisburg, PA: Bucknell University Press.

⁷³ Armitage, S., op. cit., p. 187.

⁷⁴ Carruthers, M., (2008), *The Book of Memory: A Study of Memory in Medieval Culture*, Cambridge, England: Cambridge University Press.

⁷⁵ Heaney, S., op. cit., p. 97.

⁷⁶ Ibid., p. 189.

⁷⁷ Tolkien, J.R.R., op. cit.

⁷⁸ Frank, R., (1982), *The Beowulf Poet's Sense of History*, in L. D. Benson & S. Wenzel (Eds.), *The Wisdom of Poetry: Essays in Early English Literature in Honor of Morton W. Bloomfield* (53-65), Kalamazoo, MI: Medieval Institute, Western Michigan University.

and cultural action – built to teach the listener how to remember both deeds and the moral codes they stand for. Andy Orchard⁷⁹ also notes that heroic verse such as *Beowulf* attempts to "preserve glory in the face of death" and convert ephemeral life into enduring history via collective memory. The poem therefore becomes more than a tale of individual heroism, but an examination of how a people sustain themselves through the ritual of story, linking identity, remembrance, and morality together in the face of relentless decay.

Ultimately, both *Beowulf* and *Sir Gawain and the Green Knight* are cultural and moral mirrors that hold up to the *Dark Ages* audience a kind of ethical scrutiny and religious reflection. In *Sir Gawain and the Green Knight*, then, the allegorical ordering of the poem and focus on moral judgment are not merely rhetorical tropes, but part of a broad-scale cultural and theological tradition that controls much of *Dark Ages* literature. Gawain's journey is like a Christian confession, where he talks about his sins, knowledge, repentance, and restoration. He tests himself to see if there is a conflict between doing the right thing and needing to be safe. Avoiding his admittance to the green belt does not render him dishonourable as it only makes him human – flawed, but also capable of introspection and growth. Patrick Outhwaite⁸⁰ asserts that Gawain represents a law of penitential theology that moral sin serves not as an end, but as a path to enlightenment and humbleness. Gawain takes his personal failure and turns it into a public moral lesson. He does this by wearing the belt in public as a sign of his shame. Therefore, the poem fails to demonstrate a hero who is perfect in every way; instead, it shows a hero that the audience can think about their own morals with. This illustrates early medieval literature's desire to promote introspection, humility, and the quest for divine grace as aspects of the human experience.

Beowulf is both a heroic epic and an elegy for a world on the threshold of change. It epitomises the most important themes of the literature of the *Dark Ages*: mortality, cultural change, and the impermanence of human greatness. The poem not only recounts the exploits of a legendary warrior, but captures a society in transition, changing from oral tradition to written record, from pagan fatalism to Christian redemption, and from tribal kinship to emerging centralised authority. These are not shown triumphantly, but with a deep sense of cultural loss. *Beowulf*'s demise signifies more than the loss of a hero; it is the symbolic death of an era. The final lines of the poem are a declaration of public grieving: "They praised his heroic nature and deeds / and gave thanks for his greatness... They said that of all the kings on earth / he was the most merciful and just man."⁸¹ The mood here of irreversibility of loss is consistent with the mediaeval preoccupation with memory and the tenuous longevity of honour over time which reflects the medieval fascination with human

⁷⁹ Orchard, A., (2003), *A Critical Companion to Beowulf*, Cambridge, England: D.S. Brewer.

⁸⁰ Outhwaite, P., (2021), *Sir Gawain's Penitential Development from Attrition to Contrition*, "The Chaucer Review", 56 (2), pp. 153-170.

⁸¹ Heaney, S., op. cit., p. 213.

greatness and the necessity of memory. Roberta Frank⁸² finds that the poem displays a wistful vision of an earlier heroic age refracted through the Christianised religious and moral lens of a later audience. Similarly, John D. Niles⁸³ argues that *Beowulf* is a cultural artifact that lodges memory in poetry at a moment increasingly aware of its own historical fragility. The elegiac mood of the poem, particularly towards its later verses, is the pinnacle of literary imagination in the *Dark Ages* – an era of decline of heroic virtues, fatality, and the potency of literature in maintaining moral and cultural continuity alive.

In short, the literature from what we now call the *Dark Ages* shows that cultural life was growing and becoming more diverse. As oral and literary traditions started to blend with the written word, medieval literature showed a wider and more developed social awareness, and Latin slowly gave way to the vernacular. *Sir Gawain and the Green Knight* and *Beowulf* exemplify this transformation, both in their linguistic evolution and in their profound examination of moral, religious, and heroic ideals. Both works teach morals while encouraging the reader to think about honour, humility, and the conflict between personal desire and social values. Gawain's journey is about how to repent and admit to sin, and it focuses on how chivalry can help people grow and become stronger. *Beowulf* takes death and leadership seriously. The hero's death requires us to reconsider how power is fleeting, and memory is lasting. Both texts are also strongly concerned with the natural world as symbolic and moral space that indicates inner disturbance and cultural disturbance. Furthermore, their shared concern with memory and reputation renders the importance of legacy a focal point of mediaeval thinking, where heroic action was not only for glory, but as a model of moral instruction. In their syncretism between pagan and Christian philosophies, both texts capture the spiritual syncretism of the time, an enduring hallmark of early mediaeval literature. By no means culturally inert, the *Dark Ages* were a time of literature replete with moral complexity, spiritual metaphor, and cultural negotiation. These works are enduring not only because of their craftsmanship, but because they have the ability to communicate about timeless human concerns: how to live, how to lead and how to be remembered.

Conclusion

This study demonstrates that the so-called *Dark Ages* were not only thought of as a period of decline. Although it was often characterised by inadequate documentation and perceived cultural stagnation, the era witnessed significant literary, material, and socio-political development. Examining canonical works such as *Sir Gawain and the Green Knight* and *Beowulf* offers valuable insight into the moral, spiritual, and cultural values that shaped early medieval society. These

⁸² Frank, R., op. cit.

⁸³ Niles, J. D., (2002), *Maldon and Mythopoesis*, in R. M. Liuzza (Ed.), *Old English Poetry: Critical Essays* (445-474), New Haven, CT: Yale University Press.

narratives convey the complexities of a civilisation in transition, exploring themes of mortality, honour, and collective memory. They also dramatise the tension between pagan and Christian belief systems, revealing a worldview defined by both loss and resilience.

At the same time, the integration of historical and archaeological evidence – from changes in the vernacular to structural alterations and artefacts such as the helmet of Sutton Hoo – provides a material counterpoint to the themes in the documentary records. The sites at Bamburgh Castle and the Oratory of Gallarus provide concrete evidence of the everyday reality of early mediaeval society, defence techniques, and symbolic architecture. The contrast between Roman and Anglo-Saxon building techniques, amours and preferences illustrates the way in which cultural identity was negotiated through form and purpose.

Taken as a whole, these texts resist reducing the *Dark Ages* to an era of civilisational decline or intellectual obscurantism. Rather, they insist on the energy of an interdisciplinary methodology that offers a multi-layered picture of the era, one that considers pliable material culture, religious hybridity, and literary imagination. Finally, the *Dark Ages* are characterised not as an age without history, but as an age of transition in which survival and history were present and shaped the cultural foundations of the English Middle Ages.

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SAMOTNOŚĆ JUDY FAWLEY’A. ANALIZA PORÓWNAWCZA POWIEŚCI THOMASA HARDY’EGO PT. „JUDA NIEZNANY” I JEJ FILMOWEJ ADAPTACJI PT. „JUDE” W REŻYSERII MICHAELA WINTERBOTTOM’A

Streszczenie: Artykuł koncentruje się na zbadaniu czynników wpływających na poczucie samotności Judy Fawley’a w powieści Thomasa Hardy’ego i w filmie Michaela Winterbottom’a oraz przeanalizowaniu w jaki sposób wymienione czynniki są przedstawione w czterech kluczowych scenach historii. W każdej ze scen zbadany zostanie inny aspekt przeżyć bohatera: osierocenie, niepowodzenia na polu nauki, zmagania w relacjach międzyludzkich i kryzys wiary. Celem artykułu będzie także pokazanie, jak reżyserowi, mimo rozmaitych zmian w fabule, udało się zachować głęboką symbolikę powieści i przenieść ją na ekran. Dzięki tej analizie zostaną uwypuklone różnice i podobieństwa pomiędzy literacką i filmową wersją historii Judy Fawley’a, ze szczególnym uwzględnieniem sposobu, w jaki obie wersje ukazują temat samotności w życiu bohatera.

Słowa kluczowe: Jude, samotność, osierocenie, porażka, kryzys wiary.

Abstract: The article will concentrate on examining the factors that affect Jude Fawley's sense of loneliness in both the novel and the film, along with exploring how these elements are depicted in four key scenes in the story. In each of these scenes, a different aspect of the hero's experiences will be examined: orphanhood, failures in the field of science, struggles with interpersonal relationships, and a crisis of faith. The purpose of the article will also be to demonstrate how the director, despite various changes to the plot, successfully preserved the profound symbolism of the novel and adapted it to the cinematic medium. Thanks to this analysis, the differences and similarities between the literary and film versions of the same story will be emphasized, particularly focusing on how both versions portray the theme of loneliness in the hero's life.

Keywords: Jude, loneliness, orphanhood, failure, crisis of faith.

Często powtarzamy, że czasami samotność nie ma nic wspólnego z brakiem towarzystwa. Jednak już samo brzmienie tego słowa niekiedy wywołuje w człowieku lęk. Niemniej jednak jest to temat uniwersalny, dotyczący każdego człowieka bez względu na czasy, w których żyje. Wątek samotności niejednokrotnie podejmuje w swoich powieściach Thomas Hardy. Ten słynny angielski poeta i powieściopisarz przełomu wieków zmagają się z nim w swoich największych dziełach takich jak *Z dala od zgiełku* (1874), *Powrót na wrzosowisko* (1878), *Burmistrz z Casterbridge* (1886), *Tess* (1891) czy *Juda Nieznany* (1895). Przybiera ona różne formy począwszy od osierocenia aż po wyobcowanie i odrzucenie przez społeczeństwo. Jak powszechnie wiadomo, ostatnia powieść Hardy'ego *Juda Nieznany* (1891) nie spotkała się z przychylnością krytyki. Nowy rodzaj bohatera – wrażliwca miotającego się między tym, co uznane za moralne, a własnymi namiętnościami - nie zyskał aprobaty czytelników. Sympatyków nie przysporzył powieści także płynący z niej nastrój fatalizmu i obojętności świata na los jednostki. Co gorsza, utwór uznano za skandaliczny przez co Hardy zdecydował się porzucić powieściopisarstwo i powrócić do poezji, której wyższość nad prozą zawsze uznawał. W największym skrócie *Judzie* zarzucono przede wszystkim brak moralności, obsceniczną a także drastyczność niektórych szczegółów. Tymczasem Hardy w przedmowie do pierwszego wydania wyjaśnia, że jest to przede wszystkim opowieść o tragedii niespełnionych marzeń oraz o „śmiertelnej walce między ciałem i duchem”, w której człowiek niejednokrotnie pozostaje sam i ponosi klęskę. Po latach powieść została doceniona, przez co *Juda Nieznany* spotkał się z zainteresowaniem filmowców. W 1971 roku zekranizowano ją w formie sześcioczęściowego serialu wyprodukowanego przez stację BBC w reżyserii Hugh David'a. Do bardziej znanych adaptacji powieści należy jednak kinowa wersja z 1997 roku pod tytułem *Jude* wyreżyserowana przez Michael'a Winterbottoma. W związku z tym celem artykułu będzie omówienie czynników składających się na poczucie samotności głównego bohatera oraz pokazanie ich funkcjonowania w czterech reprezentatywnych scenach w powieści i filmie. Każda z nich obrazuje inny aspekt samotności bohatera wynikający z: osierocenia, fiaska w dziedzinie nauki i relacji międzyludzkich oraz utraty wiary. Oprócz tego celem artykułu jest również pokazanie, że mimo wprowadzenia w filmie kilku zmian odnośnie fabuły reżyserowi udaje się przełożyć głęboką symbolikę powieści na język filmu.

W tytule ostatniej powieści Hardy'ego pojawia się słowo „obscure”. Według słownika *Oxford Dictionary of English* oznacza ono: “not discovered or known about, uncertain, not easily understood, hard to define, vague.” (nieodkryty, niewiadomy, niepewny, niełatwo zrozumiany, trudno definiowalny, niejasny), a więc sam tytuł po trosze zdradza, z jakiego rodzaju bohaterem mamy do czynienia. Określenie „nierozumiany bądź nieznany” wydaje się wysuwać na pierwszy plan, tak więc polskie tłumaczenie tytułu „Juda Nieznany” jest jak najbardziej uzasadnione. „Nieznany” nie oznacza bynajmniej braku popularności bohatera, ale sięga znacznie głębiej i dotyczy niezrozumienia z jakim spotyka się na różnych etapach swojego życia. Juda, czyli człowiek nieznany nikomu, nierozumiany przez

nikogo, a przez to inny, wyróżniony spośród tłumu, od pierwszej chwili wyrzucony poza nawias wszystkiego co uznane jest za normę, człowiek niedopasowany i jak pokażą kolejne strony powieści - w swym niedopasowaniu okrutnie samotny. Nazwisko Judy – Fawley, jakże bliskie brzmieniowo angielskiemu słowu ‘fall’ (upadek) jeszcze dodatkowo pieczętuje tragiczny los bohatera. Nietrudno więc zauważyć jak silny ładunek emocjonalny niesie ze sobą już samo imię i nazwisko głównego bohatera. Oprócz tego ma ono jeszcze wymiar głęboko symboliczny odwołujący się do tradycji greckiej i *Biblii*. Tę ostatnią zdradza chociażby wygląd głównego bohatera – czarna broda i włosy – w połączeniu z imieniem – Juda stawia przed oczyma dość jednoznaczny wizerunek biblijnego Żyda. Poza tym, jego ciągłe przemieszczanie się z miejsca na miejsce począwszy od Marygreen, a skończywszy na Christminster, przypomina tułaczą wędrówkę Żyda do „ziemi obiecanej. Należy także wspomnieć inną postać, która przychodzi na myśl kiedy mowa o Judzie Fawley’u. Jest nią jeden z dwunastu apostołów – Judasz, który wydał Jezusa Sanhedrynowi za trzydzieści srebrników. Jakiej w związku z tym Hardy udziela wskazówki odnośnie swojego bohatera? Kluczem do zrozumienia paraleli losów obu postaci jest zdrada. Judasz robi to w imię własnej korzyści materialnej, ale kiedy uświadamia sobie błąd, biegu wydarzeń nie da się już zmienić. Jezusa osądzono i skazano na śmierć. Judasz nie potrafi poradzić sobie z ciężarem odpowiedzialności za swój uczynek i odbiera sobie życie. Juda Fawley natomiast dopuszcza się zdrady swoich ambicji i planów naukowych w imię miłości do kobiety, najpierw Arabelli a potem Sue. W obu przypadkach konsekwencją błędnych decyzji jest śmierć. Powoli wyłania się więc obraz człowieka rozdartego wewnątrz, który w dodatku nie ma swojego miejsca na ziemi, człowieka którego krytycy chętnie nazywają „rootless”, czyli pozbawionego korzeni, miejsca do którego się wraca, domu. Według Jean’a Brooks’a autora *Thomas Hardy the Poetic Structure* jednym z prototypów charakterologicznych Judy jest między innymi Hiob, którego Juda z goryczą cytuje w ostatniej godzinie swojego życia. Brooks odwołuje się także do tradycji greckiej odnajdując w Judzie cechy wspólne z Tantalem czy Syzyfem. W losy obu mitycznych bohaterów wpisane jest cierpienie, losy obydwóch charakteryzuje daremny trud i bezsens ciężkiej pracy. Przysłowiową kropkę nad „i” stawia Święty Juda, który będąc patronem rzemieślników i rzeczy trudnych i beznadziejnych dopełnia charakterystyki Fawley’a, kamieniarza, który stara się pokonać samego siebie w dążeniu do celu. Odniesioną porażkę główny bohater komentuje między innymi słowami: „To, co ja próbowałem osiągnąć w ciągu jednego pokolenia, dokonać się może normalnie w ciągu dwóch czy trzech; a moje popędy, uczucia [...] były zbyt silne aby nie stanąć na przeszkodzie człowiekowi bez żadnych szans życiowych”¹. Zdaniem niektórych krytyków, między innymi Andrzeja Diniejki, *Juda Nieznany* posiada cechy powieści Bildungsroman ponieważ przedstawia losy bohatera od dzieciństwa do śmierci. Co ważniejsze jednak, utwór typu Bildungsroman jest gatunkiem, w którym autor koncentruje się na pokazaniu

¹ Hardy, *Juda Nieznany*, 379.

kształtowania się osobowości głównej postaci. Ten właśnie element wykorzystuje Hardy w tworzeniu Judy. Już od wczesnych lat chłopięcych los chłopca nie należał do najłatwiejszych, już wtedy naznaczony piętnem tragedii i samotności. Na samym początku drogi zaznacza się owo wspomniane wykorzenienie, wędrownica Judy z miejsca do miejsca. Najpierw wywołane jest ono samobójstwem matki, potem śmiercią ojca wskutek czego Juda trafia pod opiekę ciotki Drusilli, która nie znajduje dla niego żadnych cieplejszych uczuć. Ciotka mówi: „Łaska by to była, gdyby Bozia Wszechmogący zabrał i ciebie razem z matką i ojcem, ty biedny, niepotrzebny nikomu chłopczyño!”². Juda nie jest jednak przeciętnym dzieckiem, cechuje go ogromna wrażliwość na ludzi i otoczenie, na przyrodę. Ujawnia się także jego zamiłowanie do książek i wiedzy, z których rodzi się marzenie o uniwersytecie. Już w pierwszej scenie powieści cieniem na nie kładzie się wyjazd Phillotsona, wiejskiego nauczyciela, z którym je utożsamiał. Opuszczony przez swojego mentora, przez lata Juda prowadzi samotną walkę nad swoim charakterem ucząc się, studiując, zgłębiając wiedzę z niezwykłym zacięciem. Uda mu się to do czasu spotkania Arabelli, wiejskiej dziewczyny, córki hodowcy świń. Od tego momentu powoli Juda rozpoczyna walkę między „ciałem i duchem”. Lata pracy nad „duchem” zostają zaprzepaszczone za sprawą Arabelli. Wygrywa „ciało”, którego jest ona uosobieniem: „Była to przystojna ciemnooka dziewczyna[...] Miała okrągłe, sterczące piersi, pełne usta, wspaniałe zęby i ciepły koloryt skóry przypominający barwę jajka kury kochinchinki. Stworzenie to było jedynie i wyłącznie samicą – niczym więcej i niczym mniej”³. Kwintesencja kobiecości. Jest zmysłowa i praktyczna, bezpośrednia i kokieteryjna ale przynosi Judzie zgubę. Udając ciążę zmusza go do małżeństwa, które oznaczać będzie dla niego katastrofę. Między małżonkami nie ma większego porozumienia, każde z nich pojmuje świat w skrajnie odmienny sposób – Arabella – brutalnie praktyczny, Juda – idealistyczny. Losy tych dwojga przypominają biblijną historię Samsona i Dalili. Tak jak Dalila ścinając włosy Samsonowi pozbawiła go siły, tak Arabella uwodząc Judę przyczyniła się do zaprzepaszczenia jego planów i ambicji naukowych. Biblijny Samson, z hebrajskiego „siłacz”, obdarowany przez Boga licznymi darami, w tym nadludzką siłą wykorzystywaną do walki z wrogami Izraela – Filistynami, marnotrawi je wskutek własnej lekkomyślności, naiwności i uleganiu żądom. Podobnie Juda poddając się wdziękom Arabelli odstępkuje od wybranej sobie wcześniej drogi. Narrator opisuje jego rozmyślania w następujący sposób: Jakie znaczenie miały dla niego książki? Jakie znaczenie plany, których do tej pory tak się ściśle trzymał, dzień po dniu, żałując każdej zmarnowanej minuty? „Zmarnowanej!”. To zależało od punktu widzenia; przecież teraz dopiero zaczynał żyć, a nie marnować życie. Bardziej warto kochać kobietę niż kończyć uniwersytet, być pastorem, ba! nawet papieżem”⁴. Niestety małżeństwo nie znosi próby czasu, Arabella wyjeżdża

² Hardy, *Juda Nieznany*, 17.

³ Tamże, s. 47.

⁴ Tamże, s. 58

do Australii, Juda zostaje sam. Pozornie rozstanie powinno przynieść mu ulgę, ale stawia go w dość tragicznym położeniu. Fizycznie jest sam, ale w dalszym ciągu przysięga małżeńska wiąże go z Arabellą. W cierpieniu wraca do marzeń o uniwersytecie i postanawia przenieść się do Christminster. Tutaj poznaje Sue. Nieudane małżeństwo kładzie się cieniem na związek z Sue. Krytycy opisują ją jako oświeconą i neurotyczną nowoczesną kobietę, estetkę i pogankę w jednym zafascynowaną kulturą helleńską, buntowniczkę, która pojmuje małżeństwo jako ograniczenie wolności. Początkowo Juda uważa Sue za uosobienie zmysłowości i wolności. Z czasem jednak jej paniczny strach przed seksualnością budzi w nim zniecierpliwienie. Darzy ją jednak głęboką miłością i ostatecznie dla niej poświęca karierę i co ważniejsze wiarę. Sue, z kolei, jest postacią, która mimo dość sprecyzowanych poglądów w większości przypadków działa pod wpływem impulsu. Można by powiedzieć, że jednym z elementów różniących Sue i Judę jest fakt, że on aspiruje ponad swoją klasę społeczną, a Sue także ponad swoją płeć. Konflikt z otoczeniem nie wynika zatem z tego, co kobieta może zdziałać, ale czego się od niej oczekuje. W końcowej części powieści Sue decyduje się spełnić oczekiwania otoczenia poprzez zerwanie niesakramentalnego związku z Judą i powrót do Phillotsona. Nawiązując jeszcze raz do historii Samsona należy dodać, że ostatecznie zostaje pokonany przez Filistynów. Przenosząc tę opowieść na grunt powieści, łatwo zauważyć, że poprzez powrót do Phillotsona, którego nazwisko jest brzmieniowo podobne do słowa „Filistyn”, czyli „obcy”, także Sue przyczynia się do życiowej porażki Samsona – Judy.

Mając szeroką wiedzę na temat wielowarstwowości utworów Thomasa Hardy'ego, licznych zawartych w nich odniesień do Biblii i mitologii oraz głębokiej symboliki i złożoności postaci filmowcom nie jest łatwo dokonać udanej adaptacji powieści. Mimo, że doczekały się one wielu ekranizacji a sam autor uznawany jest za pisarza tak dbałego o szczegółowość obrazu czy budowanie atmosfery, że poszczególne sceny powieści przypominają kadry filmowe, nie wszystkim reżyserom udaje się odzwierciedlić klimat powieści. Nawet przyjmując, że adaptacja jest tylko przełożeniem obrazu na ekran, nie każdy reżyser potrafi dokonać jej w sposób zadowalający. Sukces w tej dziedzinie odnosi niewątpliwie Michael Winterbottom i jego *Jude* (1997). Kiedy zapytano reżysera z czego wynika jego zainteresowanie Hardym, odpowiedział, że najważniejszym elementem twórczości poety Dorsetu jest jego umiejętność budowania relacji jednostka – zbiorowość, a także krytyczna ocena sił rządzących społeczeństwem, jakimi są małżeństwo czy obyczaje. Te dwa czynniki są między innymi przyczyną ludzkich tragedii opisanych w *Tess* (1891) czy *Judzie Nieznanym* (1895). Reżysera interesują bohaterowie, którym się nie udaje. Chodzi tutaj o ich brak umiejętności dostosowania się do norm i obyczajów społecznych i nieudolność w walce z nimi. Adaptacja „Jude” Winterbottom'a wydobywa problem samotności poprzez subtelność obrazu, symboliczną grę światłocienia oraz stonowaną kolorystykę. Reżyser pokazuje samotność także poprzez oszczędność w dialogach między bohaterami oraz w przejmującej muzyce bądź ciszy. Jak zauważa Adela Styczyńska, powieść

Thomasa Hardy'ego toczy się dwutorowo. Z jednej strony mamy plany kariery uniwersyteckiej, z drugiej natomiast relacje z Sue. Adaptacja Michael'a Winterbottom'a w znacznej mierze koncentruje się na drugim aspekcie, czyli miłości do Sue. Motywem przewodnim filmu jest zatem samotność i cierpienie bohatera spowodowane niespełnieniem w miłości oraz zaburzeniem relacji, która powoduje życiową klęskę.

Jedna z piękniejszych scen powieści i filmu przedstawia Judę pracującego na polu farmera Trouthama. Mała postać chłopczak kołatką w ręce maszeruje przez połać ziemi strasząc nadlatujące gawrony przed wydziobaniem resztek zeszłorocznego ziarna. Smutne zagony ciemnobrązowej zaoranej ziemi rozciągają się wokół bezkresem i aż po horyzont zasnuty z każdej strony mgłą tworząc przestrzeń na swój sposób klaustrofobiczną. Dodatkowo uczucie pustki potęguje smutny brązowy kolor ziemi, na której poza Judą i gawronami nie ma niczego co oznaczałoby życie, nie ma drzew, nie ma innych zwierząt, nawet słońce zakrywa mgła, panuje ogólna cisza przerywana pojedynczymi uderzeniami kołatki. Warto także zauważyć, że najprawdopodobniej jest to czas późnojesienny, co kojarzy się raczej z obumieraniem i przejściem w stan wegetacji. Juda tymczasem, działa wbrew naturalnemu porządkowi rzeczy, karmiąc gawrony rzuca ziarnem niczym siewca, na ziemię, która już wydała plon i wyjałowiała się. Wrażenie pustki potęgują u czytelnika również echa przeszłych zdarzeń, których Juda nie może słyszeć i na które jest całkowicie obojętny. „Echa pieśni z dawnych żniwnych dni, echa wymówionych słów i znoјnej pracy. Każdy cal tej roli był w swoim czasie terenem pracy i wesołości, rubasznych zabaw, kłótni i znużenia”⁵. Pustka i cisza powodują, że scena jest bardzo statyczna, a wszelki ruch wydaje się niewidoczny na tle sięgającej po horyzont przestrzeni. Jedynie dźwięk kołatki podrywa gawrony do lotu w inne miejsce „z powolnym ruchem skrzydeł o lśnieniu kolczugi”⁶. Odpędzanie ptaków, które i tak będą wydziobywały ziarno przypomina bezsensowny trud Syzyfa – jeden wątyły chłopiec przeciwko chmarom głodnych gawronów. W pewnym jednak momencie Juda przestaje walczyć i po raz pierwszy ukazuje się bardzo istotny rys jego charakteru – wrażliwość. Można by powiedzieć, że z Syzyfa przeistacza się poniekąd w św. Franciszka. Zaczyna współczuć ptakom, które: „tak jak on zdawały się żyć w świecie, który wcale ich nie potrzebował” pozwala im najeść się do syta. W gawronach próbuje odnaleźć bratnie dusze, „o których mógł powiedzieć, że się nim cokolwiek interesują, bo przecież ciotki nic nie obchodził, jak to często zaznaczała”⁷, stworzenia które tak jak on cierpią z powodu samotności, osierocenia czy obojętności innych. W zamian za swoją dobroć i odruch człowieczeństwa zostaje wyrzucony z pracy. Cała scena opowiedziana jest przez wszechobecnego narratora, oraz przetkana pojedynczymi dialogami. Narrator obojętnie zdaje relację z tego co widzi, od czasu do czasu zdobywając się na komentarz dotyczący uczuć Judy.

⁵ Hardy, *Juda Nieznany*, 19.

⁶ Tamże, s. 19.

⁷ Hardy, *Juda Nieznany*, 20.

W filmie Michael'a Winterbottom'a wspomniana scena stanowi prolog do całej opowieści i w udany sposób utrzymuje pesymistyczny klimat oraz pokazuje niemoc jednostki wobec złowrogości otaczającego ją świata. Nie ma narratora, który przybliżyłby historię Judy, dlatego reżyser zdecydował się na środki, które w jednoznaczny sposób zasugerują tragiczny los chłopca oraz zobrazują jego wrażliwą naturę. W związku z tym scenę zrealizowano w kolorze czarno – białym w małym kadrze ograniczającym pole widzenia, a przez to wyznaczającym horyzont. Ujęcia na długim i krótkim planie przeplatają się wzajemnie, raz ukazując ogromną przestrzeń pustej zaoranej ziemi, a raz sylwetkę Judy wyrażającą niezadowolenie z wykonywanej pracy. Zanim jednak jego postać po raz pierwszy ukaże się na horyzoncie słychać tylko odgłosy kołatki, skrzekliwe zawodzenie ptaków, które pogłębia muzyka podobna do skrzypiec. Moment, w którym Juda przechodzi obok straszaków z ciałami wiszących gawronów można uznać za przełomowy. Kamera mija je, a twarz Judy wyraża współczucie, słychać jego głębszy oddech, a co najważniejsze milknie kołatka. Jest to moment utożsamienia się chłopca z cierpieniem gawronów, co natychmiast skutkuje jego odmienną reakcją. W przeciwieństwie do powieści, zamiast ziarnem Juda dzieli z gawronami chlebem. Samotność bohatera na pustym polu oznacza także zapowiedź emocjonalnego wyobcowania ze świata i znalezienia w nim swojego miejsca.

Miejsca tego, które jednocześnie dałoby mu szczęście, Juda będzie bezskutecznie poszukiwał aż do śmierci. Nie znajdzie go jednak ani w małżeństwie z Arabellą, ani w miłości do Sue. Nie spełni się także marzenie bohatera o karierze uniwersyteckiej. Scena, w której Juda otrzymuje odmowę przyjęcia na uniwersytet od jednego z dziekanów Biblioll College w Christminster jest jedną z ważniejszych, jeśli chodzi o temat samotności. Dotyczy bowiem odepchnięcia głównego bohatera od świata, do którego zawsze pragnął należeć oraz obrócenia w niwecz jego kariery naukowej. List dziekana działa na Judę jak otrzeźwienie z głębokiego letargu a „zawarta w nim mądrość, którą początkowo przyjął ze złością, teraz zmroziła go i przygnębiła. Spojrzał na siebie jak na głupca”⁸. Ból i gorycz niespełnionego marzenia znajdują ujście w cytacie z księgi Hioba: „Też ci ja mam serce jako i wy, anim jest podlejszy niżli wy, bo któż tego nie wie co wy wiecie?”⁹, który główny bohater umieszcza na murze Biblioll College. Najważniejsza jednak jest świadomość Judy, że Christminster – ziemia obiecana, jest miastem o dwóch obliczach tzw. „town and gown”, obliczach, które wzajemnie się wykluczają, ale do żadnego z nich Juda nie należy. Dostrzega, że to, do czego pretenduje, czyli „town” to świat ludzi nauki, ekskluzywny klimat uniwersytecki, do którego przez swoje niskie urodzenie nie ma wstępu. Drugi współistniejący świat, to ludzie prości, niższe klasy społeczne. I tutaj nie ma miejsca dla Judy, który intelektualnie wyrasta ponad swoją warstwę społeczną i jest przez nią nierozumiany. W jednym i drugim przypadku Juda staje się outsiderem, żyje obok a nie w każdym z dwóch światów. Kulminacją

⁸ Hardy, *Juda Nieznany*, 139.

⁹ Yamże, s. 138.

rozczarowania jest moment, kiedy główny bohater recytuje *Credo* po łacinie. Dramatyzmu scenie dodaje miejsce, w którym się rozgrywa. Szynk, ośrodek gdzie wspomniane wcześniej „town and gown” mieszają się ze sobą, gdzie obok kamieniarzy, blacharzy czy innych robotników, są studenci uniwersytetu. Szynk stanowi niejako mikrokosmos Christminster. Panuje tu ogólny gwar i jak zwykle w takim miejscu, toczy się wiele rozmów jednocześnie. Wśród ogólnego zamieszania postać Judy nie wysuwa się początkowo na pierwszy plan. Fawley cierpi, rozgoryczony niedawno otrzymanym listem dziekana a także zraniony w uczuciach do Sue. Czarę goryczy przelewa pamięć widoku dziewczyny obejmowanej przez Phillotsona. Przez wiele godzin zanim pojawią się inni goście tawerny Juda siedzi sam, znowu z boku, w ciemnym kącie, nie rzucając się w oczy. Dopiero wieczorem, będąc już mocno pod wpływem alkoholu, sprowokowany przez jednego z towarzyszy recytuje *Wyznanie wiary*. Jak się okaże jest to również jedyna dla Judy okazja aby zaprezentować swoją wiedzę. W wypowiedzianych słowach nie brzmi jednak duma, ale niemoc i bezradność, słysząc także żal za czasem wyczerpanej pracy poświęconej studiom nad greką i łaciną, które za sprawą jednego listu obróciły się w niwecz. Tak wielka frustracja bohatera nie może nie wywołać wrażenia. Wśród ogólnej ciszy Juda zwraca się z drwiną do zgromadzonych: „Stado durniów! [...] Który z was wie, czy powiedziałem Wyznanie Wiary, czy co innego? Mogłem byle co powiedzieć w byle jakim szwargocie, a i tak nic by nie dotarło do waszych głupich łbów”¹⁰. Słowa te stanowią kres iluzorycznych pragnień studiowania na uniwersytecie, bohater uświadamia sobie nieestosowność miejsca, w którym wygłoszony został tekst i wychodzi trzaskając drzwiami. Istotną konsekwencją tej sceny jest nadzieja, która zapewni Judzie motywację do dalszej pracy i dalszego życia. Człowiek, którego marzenie i cel okazały się płonne, i którego szczerą miłość do kobiety zawsze przysłaniać będzie wcześniejsze nieudane małżeństwo chwytą się ostatniej deski ratunku jaką jest Bóg. Juda postanawia zostać duchownym. W samotności ziemskiego życia przez krótki moment przyświecać mu będzie nadzieja, że jest Bóg, który go nie opuścił, który przyjmie go na łono kościoła, dzięki czemu będzie mógł zrealizować potrzebę „czynienia dobra”¹¹.

Adaptacja Michael’a Winterbottom’a pokazuje przyczynę rozpacz Judy, która skutkuje recytacją *Credo* w jednej z christminsterskich tawern za pomocą dwóch krótkich 1. minutowych scen. Sceną pierwszą jest oczywiście widok Sue w ramionach Phillotsona. W czarno-granatowym mroku i zimnie powodowanym przez ulewny deszcz Juda widzi Sue i Phillotsona objętych i głośno rozmawiających. Następuje zbliżenie kamery na twarz Judy, na której odbija się ból pomieszany z rozczarowaniem i jak można wnioskować poczuciem zdrady. W tle muzyka miesza się z odgłosami rozmowy Sue i Phillotsona. Następnie reżyser płynnie przechodzi do kolejnej sceny. Z ciemności powoli wyłania się twarz Judy, słysząc jego głębokie westchnięcie, co zapewne oznacza, że poprzednie doświadczenie wywołało w nim

¹⁰ Tamże, s. 142.

¹¹ Hardy, *Juda Nieznany*, 146.

poczucie głębokiego zawodu i nie daje mu spokoju. Wtedy właśnie Juda otrzymuje list od dziekana Bibliol College z odmową przyjęcia na uniwersytet. W pokoju panuje ciemność pochłaniająca niemal całą sylwetkę Judy przełamana jedynie słabym światłem lampy, przy którym czyta list. I wreszcie słynna scena recytacji. Wnętrze lokalu w filmie *Winterbottom*'a odbiega od tego jaki zwykle powstaje w wyobraźni w takich przypadkach oraz od tego jaki opisuje Hardy: „podły, ciasny szynk w zaułku”. Wnętrze jest wysokie. Podłużne prostokątne obrazy i lustra potęgują to wrażenie. Słysząc, rzecz jasna, gwar prowadzonych rozmów, ale wydaje się on być lekko zgaszony. Nie widać typowego dla tego miejsca pijaństwa, nad głowami rozmówców nie unosi się także najmniejsza smuga dymu papierosowego. Nie widać nędzników chociaż z łatwością rozpoznać można warstwę społeczną z jakiej pochodzą poszczególni ludzie. Być może w zamyśle reżysera tak właśnie wyglądać miało wspomniane wcześniej „town” i „gown”. Być może także chodziło reżyserowi o wydobycie klimatu uniwersyteckiego, który tak Judzie imponował. Sam moment recytacji nie jest długi. Juda stoi na krześle, górując na innymi. Z każdym kolejnym słowem *Credo* kamera przybliża twarz recytującego, na której duma miesza się z poczuciem rozpaczy i bezsilności. Ton głosu bliski płaczu oraz zaciśnięte zęby potwierdzają emocje z jakimi Juda walczy, świadczą o bólu odrzucenia trudnym do wytrzymania dla jednego człowieka. Ponadto reżyser pokazuje obojętną reakcję otoczenia na słowa Judy. Mimo, że są tak pełne cierpienia nie wywołują większego zainteresowania. Chwilę później nie ma już śladu po dramatycznym wystąpieniu, rozmowy toczą się dalej a Juda wychodzi. Dopiero teraz jego gorzkość znajduje ujście w napisanych na murze słowach z Księgi Hioba: „Też ci ja mam serce jako i wy, anim jest podlejszy niżli wy; bo któż tego nie wie, co wy wiecie?” Cytat stanowi niejako dramatyczny apel do dziekanów uniwersytetu aby nie zamykali drogi do nauki ludziom, którzy naprawdę pragną ją zgłębiać, ani nie odrzucali ich ze względu na pochodzenie.

Niedługo potem Juda dowiaduje się o małżeństwie Sue z Phillotsonem. Dla obojga jest to czas ogromnie trudny, zwłaszcza dla Judy, który musi biernie przyglądać się nieudanemu związkowi tych dwojga. Jest to moment o tyle ważny, że stanowi pewnego rodzaju przełom w życiu głównego bohatera. Rozdarcie między niemożnością bycia z Sue a miłością do niej za pomocą udanej metafory obrazuje scena rozgrywająca się tuż po śmierci ciotki Drusilli. Oto Juda budzi się w nocy słysząc pisk złapanego w potrzask królika. Tu daje o sobie znać jego wrażliwość w stosunku do zwierząt. Narrator przypomina, że w dzieciństwie aktem miłosierdzia było karmienie gawronów lub ‘oszczędzanie życia dżdżownicy’¹², w obecnej sytuacji miłosierdziem staje się śmierć, będąca skróceniem cierpień niemożliwych do wytrzymania. Królik w potrzasku w sposób bardzo symboliczny obrazuje los głównego bohatera. Nie chodzi tu jedynie o skomplikowaną relację z Sue, ale o życie Judy w ogóle. „Swoim zwyczajem stworzonko nie od razu powtórzyło ten krzyk i pewnie nie odezwie się więcej jak raz czy dwa, znosząc cierpienie aż do ranka,

¹² Hardy, *Juda Nieznany*, 246.

kiedy przyjdzie myśliwy i zada mu śmiertelny cios w głowę”¹³. Słowa te oddają strach, ból i samotność zwierzęcia, znajdującego się w pułapce, z której wybawić może je tylko śmierć. Potrzask sprawia, że zwierzę jest bez szans. Nawet jeżeli zdoła wyrwać się z pułapki najpewniej wykrwawi się na śmierć. Musi zatem czekać na człowieka, który przyjdzie aby tę śmierć mu zadać. Zwierzę jest samo, jest noc, nikt go nie słyszy. Życie Judy poniekąd przypomina los królika złapanego w potrzask, któremu ruch w jakąkolwiek stronę, czy to będzie kariera uniwersytecka, czy miłość do Sue przynosi cierpienie. Niemniej jednak w tym właśnie momencie Juda dokonuje wyboru. Odrzuca sferę ducha i poświęca się ciału. Porzuca swoje przekonania, ‘doktryny i religię’. Otoczenie jest głuche na jego szarpaninę i mimo, że Juda próbuje na swój sposób oznajmić światu swój krzyk cierpienia poprzez recytację *Credo* czy deklaracji miłości do Sue, nikt go nie słyszy, nikt nie reaguje. Wybawieniem dla niego jest tylko śmierć, a tym który ostatecznie mu ją zada będzie Bóg. Konsekwencją tej sceny jest przegrana ‘ducha’ z ‘ciałem’. Juda postanawia odrzucić plany naukowe, pali wszystkie księgi i decyduje się poświęcić miłości do Sue. Najlepszym podsumowaniem sceny są słowa: „Jakie to dziwne, że jego pierwszym dążeniem ku wiedzy uniwersyteckiej – położyła kres kobieta, i również kobieta położyła kres następnemu dążeniu – ku kapłaństwu”¹⁴.

Reżyser interpretuje tę scenę w podobny sposób. Juda słyszy pisk złapanego w potrzask królika i z lampą w ręce wychodzi by ulżyć zwierzęciu w cierpieniu. Łamie mu kark. Wtedy pojawia się Sue. Jest roztrzęsiona. Między bohaterami da się wyczuć rosnące napięcie. Kulminacją sceny jest pocałunek, który ostatecznie pieczętuje los Judy. Mimo, że nie ujęcia, w którym pali księgi, Fawley decyduje się być blisko Sue przeprowadzając się do Shaston, miejsca gdzie mieszka z Phillotsonem.

Jak bardzo brzemienne w skutkach okazała się ta decyzja pokazuje ostatnia scena. Powieść Thomasa Hardy’ego kończy przedwczesna śmierć Judy. Nie może być innego rozwiązania dla człowieka, który poniósł porażkę w każdej dziedzinie życia. Znamiennym jest fakt, że Juda umiera właśnie w Christminster, miejscu, w którym zrealizować się miało jego największe marzenie. A tymczasem umiera samotnie, pokonany psychicznie. Siły fizyczne także odmawiają mu posłuszeństwa. Nie ma przy nim Sue, o którą walczył, którą kochał, dla której poświęcił najwięcej tzn. karierę naukową oraz wiarę w Boga. Sue okazała się największą zdrajczynią swoich przekonań. Z nowoczesnej kobiety o śmiałych poglądach, niedbającej o konwenanse przekształciła się w słabą psychicznie osobę, którą presja otoczenia, a przede wszystkim utrata dzieci popchnęła do zdrady wszystkich dotychczasowych przekonań. Wbrew samej sobie wróciła do Phillotsona. Nie ma przy Judzie także Arabelli, która czasowo powraca do pełnienia swych sakramentalnych obowiązków. O dość ironicznym charakterze sceny świadczy fakt, że podczas gdy Juda umiera samotnie w poczuciu życiowej przegranej, na zewnątrz tłum obchodzi rocznicę

¹³ Tamże, s. 246.

¹⁴ Hardy, *Juda Nieznany*, 250.

upamiętniającą założenie uniwersytetu oraz zakończenie roku akademickiego. Kiedy Juda umiera samotnie w poczuciu życiowej przegranej na zewnątrz tłum świętuje i wiwatuje. Warto także dodać, że cała scena odbywa się w otoczeniu piękna przyrody, która również zdaje się poddawać ogólnemu nastrojowi wesołości i nie zwraca uwagi na tragiczny los umierającego człowieka: „dzień był ciepły, bezchmurny, powabny”¹⁵. Tymczasem Juda, można by powiedzieć, kończy swój rok akademicki na uniwersytecie życia. Juda leży samotnie w małym, ciasnym pokoju. Do jego uszu dochodzą wesołe okrzyki z zewnątrz, a on recytuje fragmenty z Księgi Hioba: „Niech zginie dzień, któremu się urodził, i noc, w którą rzeczono: Począł się człowiek.”¹⁶ Mury pokoju, które odgradzają go od świata zewnętrznego można potraktować dosłownie i metaforycznie. Dosłownie, ponieważ samotność Judy silnie kontrastuje ze wspólnotą wiwatującego tłumu, i metaforycznie ponieważ nie rozumiano go ani w jego dążeniu do wykształcenia ani w miłości. Świat jest obojętny na jego los. Cytaty z księgi Hioba przeplatają się z okrzykami radości dochodzącymi z zewnątrz a wywołanymi radosnymi obchodami Święta Przypomnienia. Wszystkie ziemskie pragnienia Judy okazały się klęską, nie przyjęto go na uniwersytet, nie został także duchownym. Sue, która była przyczyną wszystkich jego poświęceń odeszła. Najważniejsze jednak jest to, że utracił także wiarę w Boga. Nie bez znaczenia wydają się być cytaty z Księgi Hioba. Kontekst wypowiedzianych słów w powieści różni się jednak od biblijnego. Hiob był człowiekiem, który w najtrudniejszej próbie nie oddalił się i nie sprzeniewierzył Bogu. Mimo ciężkiego doświadczenia śmierci dzieci, utraty majątku oraz choroby zawsze pozostawał blisko Boga. Dzięki temu, pomimo cierpienia odzyskał w dwójnasób, to co utracił. Co ważniejsze jednak, czując bliskość Boga nie był samotny. Wspomniany cytat znajduje się niemal na początku Księgi, inaczej niż w powieści, gdzie słowa te są w pewnym sensie podsumowaniem życia Judy. Samotność Fawley’a na ostatnim etapie życia spowodowana utratą bliskości Boga otwiera pustkę, której nie da się wypełnić. Wybawieniem jest tylko śmierć. Juda nie może liczyć ani na hojność ani na miłosierdzie Boga, którego odrzucił.

W filmie *Winterbottom*’a zaproponowano inne zakończenie. Ostanía scena rozgrywa się na cmentarzu w Boże Narodzenie 1889 roku. Dla Judy i Sue jest to bardzo trudny dla czas po rozstaniu wywołany tragiczną śmiercią ich dzieci. Juda podejmuje ostatnią nieudaną próbę skłonienia Sue do powrotu i odbudowania ich związku, ale Sue odmawia. Nie przekonują jej nawet rozpaczliwe słowa Judy będące jednocześnie ostatnimi słowami filmu i niejako podsumowaniem ich relacji: „Jesteśmy mężem i żoną bardziej niż jacykolwiek ludzie byli na Ziemi”. Należy uwzględnić fakt, że w przeciwieństwie do powieści ostatnia scena filmu nie rozgrywa się latem lecz zimą. Surowy zimowy krajobraz oraz cmentarz pomagają w pokazaniu śmierci relacji głównych bohaterów, potęgują uczucie ich osamotnienia i nieszczęścia. W filmie *Winterbottom*’a położono większy nacisk na samotność

¹⁵ Tamże, 469.

¹⁶ Hardy, *Juda Nieznany*, 470.

człowieka wpływającą z zakończenia najistotniejszej dla niego relacji, natomiast powieść ukazuje upadek człowieka w każdej dziedzinie życia.

Podsumowując należy stwierdzić, że zarówno Thomas Hardy jak i Michael Winterbottom stworzyli dramatyczne studium samotności człowieka. Mimo iż w odróżnieniu do powieści, film kończy się duchową śmiercią głównego bohatera, w obu przypadkach mamy do czynienia z obrazem upadku człowieka spowodowanym brakiem miłości i zrozumienia, opuszczeniem przez najbliższych i balansowaniem między rzeczywistością a snem.

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“THERE IS ONLY ONE QUESTION: HOW TO LOVE THIS WORLD.” THE CONCEPT OF IMPERMANENCE (ANICCA) IN MARY OLIVER’S POETRY COLLECTION HOUSE OF LIGHT¹

Abstract: The poetry of Mary Oliver (1935-2019), often described as a modern mystic and America’s most beloved poet, is distinguished by its reverent celebration of nature as a manifestation of the sacred or ‘God’s body.’ For Oliver, poetry is a means of being mindfully present and curious about life and nature, encouraging readers to perceive the sacredness of the world. This paper examines *House of Light* (1990) with a focus on how the Buddhist concept of *anicca* (impermanence) – one of the three marks of existence in Buddhism – illuminates themes of temporality and connection in Oliver’s work. Through imagery related to time and impermanence, Oliver’s poetic language captures the ephemeral nature of reality while reflecting her wonder and love for the natural world. This analysis reveals how Oliver’s approach to impermanence fosters compassion and unity with all living beings.

Keywords: Mary Oliver, poetry, interpretation, impermanence.

Streszczenie: Poezja Mary Oliver (1935–2019), często określanej jako współczesna mistyczka i najukochańsza poetka Ameryki, wyróżnia się pełnym szacunku celebrowaniem natury jako manifestacji sacrum lub „Bożego Ciała”. Dla Oliver poezja jest sposobem na uważną obecność i ciekawość życia i natury, zachęcającym czytelników do dostrzegania świętości świata. Niniejszy artykuł analizuje „Dom Światła” (1990), skupiając się na tym, jak buddyjska koncepcja *anicca* (nietrwałości) – jeden z trzech wyznaczników istnienia w buddyzmie – oświetla tematykę czasowości i łączności w twórczości Oliver. Poprzez obrazy związane z czasem i nietrwałością, język poetycki Oliver uchwycił ulotną naturę rzeczywistości,

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jednocześnie odzwierciedlając jej zachwyt i miłość do świata przyrody. Niniejsza analiza ujawnia, jak podejście Oliver do nietrwałości sprzyja współczuciu i jedności ze wszystkimi istotami żywymi.

Słowa kluczowe: Mary Oliver, poezja, interpretacja, nietrwałość.

Introduction

Mary Oliver (1935-2019) is among the most popular and highly regarded authors of modern American poetry. Her works, though seemingly grounded in simplicity and direct observation, resonate with profound philosophical and spiritual dimensions. This paper offers a critical exploration of her 1990 poetry collection, *House of Light*, through the lens of the Buddhist concept of *anicca* (impermanence), one of the three marks of existence in Buddhist philosophy.

While existing scholarship often celebrates Oliver's spiritual themes, the relationship between literature and metaphysical reality in her poetry warrants closer theoretical scrutiny. Literature does not simply reflect reality; it constructs and interrogates it, offering imaginative frameworks for understanding transience, perception, and the sacred. This paper argues that Oliver's poetic treatment of impermanence is not merely illustrative of Buddhist ideas but constitutes a complex literary engagement with temporality and presence.

Drawing from a presentist approach, this study connects Oliver's poetry to contemporary ecological and spiritual concerns. However, it also recognizes that this framework must account for the tensions between textual representation and lived experience, between poetic abstraction and philosophical embodiment. By weaving Oliver's language of attention and presence with Buddhist impermanence, the paper invites readers to see her poems as both aesthetic objects and epistemological tools – literary spaces where reality is not simply mirrored but reimagined.

Following an overview of Oliver's spiritual orientation, the article introduces key Buddhist principles before closely analysing selected poems. Ultimately, it seeks to understand how Oliver's poetic language grapples with the impermanence of life and how this grappling itself becomes a means of spiritual inquiry.

Spirituality in Mary Oliver's Poetry

One of the defining features of Mary Oliver's poetry is her profound interest in spirituality. Oliver's understanding of spirituality aligns close with Brene Brown's definition: 'recognizing and celebrating that we are all inextricably connected to each other by a power greater than all of us, and that our connection to that power and to one another is grounded in love and compassion'². Oliver's work reveals her

² Brown B., 2018, *Dare to Lead: Brave Work. Tough Conversations. Whole Hearts*, New York: Random House.

as an avid seeker of truth, an explorer of life and a teacher for whom ‘Practicing spirituality brings a sense of perspective, meaning, and purpose to our lives’³.

In the essay ‘The Swan’, Oliver listed her three rules for creative writing: ‘Every poem [...] must have a genuine body, it must have sincere energy, and it must have a spiritual purpose’⁴. She further emphasizes the spiritual core of her work: ‘I think there is just one subject worth my attention and that is the recognition of the spiritual side of the world, and, within this recognition, the condition of my own spiritual state. I am not talking about having faith necessarily, although one hopes to. What I mean by spirituality is not theology, but attitude. Such interest nourishes me beyond the finest compendium of facts’⁵.

The spiritual dimension of Oliver’s poetry is intricately tied to her relationship with the natural world. Scholars such as the philosopher David Abram⁶ and ecologist Gary Snyder⁷ have noted the animistic quality of her work, where the natural world is imbued with a spiritual essence. For Oliver, every element of the natural world – whether sky, stone, or bird – holds profound symbolic significance. Abram argues that Oliver’s poems dissolve the boundary between humans and nature, creating a space of interconnected reverence. This perspective resonates with Oliver’s belief that spirituality is found in the deep awareness of the world around us.

For Oliver, nature becomes the medium through which God is revealed and praised. In her poem ‘At the Lake’ she writes: ‘This is, I think,/ what holiness is:/ the natural world,/ where every moment is full/ of the passion to keep moving.’⁸ Similarly, in ‘Leaves and Blossoms Along the Way’ she suggests: ‘God, or the gods, are invisible, quite/ understandable. But holiness is visible,/ entirely.’⁹ Oliver’s minimalist focus on nature – on flowers, insects, trees, and animals rather than humanity – reflects her immense curiosity and her conviction that attention to the world awakens intrinsic wisdom. This poetic strategy of awakening invites readers to recognize that Oliver’s engagement with nature is not merely observational – it is ontological. Through her verse, nature becomes a lens through which deeper questions about self, time, and being are reimagined, positioning the poem itself as an epistemological space. ‘I hope to see everything in this world before I die’, writes Oliver in her prose poem ‘May’¹⁰. As the title of one of the poems says, ‘Nothing Is Too Small Not to Be Wondered About’¹¹. Her work often stresses the

³ Ibidem.

⁴ Oliver M., 1999, *Winter Hours*, Boston & New York: Houghton Mifflin Company, p. 24.

⁵ Ibidem, p. 102.

⁶ Abram D., 1996, *The Spell of the Sensuous: Perception and Language in a More-Than-Human World*, New York: Pantheon Books.

⁷ Snyder G., 1990, *The Practice of the Wild*, Berkeley: North Point Press.

⁸ Oliver M., 1994, *White Pine*, New York: Harcourt, Inc., p. 18.

⁹ Oliver M., 2016, *Felicity*, New York: Penguin Press, p. 17.

¹⁰ Oliver M., 1994, *White Pine*, New York: Harcourt, Inc., p. 5.

¹¹ Oliver M., 2016, *Felicity*, New York: Penguin Press, p. 27.

importance of attention, believing that 'To pay attention, this is our endless and proper work.'¹² In this, what we may describe as existential, sense, Oliver's poetry shows the readers the path of practice, what to do and how to 'see' and 'live fully'. Her thoughts on life and nature are not to be taken as a system of concepts to ruminate about, but rather as a way of being and existence.¹³ Oliver's verse, then, becomes not just spiritual testimony but a literary mode of inquiry, where poetic language probes the limits of thought and dissolves the binary between poetic metaphor and lived metaphysics.

Scholars like Mark Nepo¹⁴, a poet and spiritual teacher, have also analyzed Oliver's work through the lens of "spiritual ecology," a term that refers to the understanding of nature as both a reflection of and a portal to the divine. In this context, nature is not simply a backdrop for human experience but a vital part of the spiritual journey. Nepo suggests that Oliver's poetry encourages readers to find holiness in everyday moments and to engage with the natural world as a sacred space. In doing so, Oliver's work transcends descriptive spirituality and enters the realm of metaphysical critique. The sacred in her poetry is not inherited but actively constructed through the poetic process—a reminder that language is not a passive medium but a generative force in shaping spiritual meaning. This interpretation aligns with the religious and spiritual undercurrents that run through much of Oliver's writing, especially in works like *House of Light*, where the poet's fascination with light, darkness, and the passage of time can be seen as meditations on both the impermanence of life and the enduring presence of the sacred in nature.

In a similar vein, the theologian Mirabai Starr¹⁵ has discussed how Oliver's reflections on life and death align with mystical traditions, where the

¹² Oliver M., 1994, *White Pine*, New York: Harcourt, Inc., p. 8.

¹³ In her writing about the natural world, Oliver often points at the most fundamental difference between the man on the one hand and the animals and plants on the other. The difference is in the presence of the intellect and conceptual thought in man. As Yutang Lin observes, 'once you start to use concepts, at first they are just tools used to communicate and pass on knowledge, but because we use them so often, the concepts begin to control us' (1991, p. 10) In this sense, Oliver perceives the animals, plants and stones as 'purer', uninhibited by the limits of thought and language. As a poet, Oliver's tool of expression is a word, yet, as she says in the poem 'The Notebook' (in *House of Light*, 1990, p. 44), 'More and more the moments come to me:/ how much can the right word do?' This is not meant to be understood as an expression of scepticism but rather as awareness which makes one free from seeing the concepts and thoughts as the only way to knowledge. Intellectual speculation and the general ability to think are closely related to man's strong sense of self-awareness and self-centeredness. In her poems, Oliver shows how this focus on the self can be transformed.

¹⁴ Nepo M., 2002, *The Book of Awakening: Having the Life You Want by Being Present to the Life You Have*, New York: Conari Press.

¹⁵ Starr M., 2012, *The Creative Life: How to Live a Life of Spirituality and Creativity*, Boston: Shambhala.

acknowledgment of mortality becomes a path to spiritual awakening. Through her portrayal of the natural world, Oliver invites readers to experience a spirituality that does not rely solely on organized religion but on a mystical connection to the universe itself.

It is important to mention that Oliver, in writing about God and spirituality, often speaks from the position of unknowing and accepts that God is beyond all thought and intellectual understanding. This acceptance of unknowing reveals Oliver's alignment not only with mysticism but also with literary modernism's resistance to fixed meaning. The tension between language and transcendence becomes a site of poetic labor, where silence, metaphor, and ambiguity enact spiritual exploration. In her poem 'Bone', Oliver writes: 'I believe I will never quite know./ Though I play at the edges of knowing,/ truly I know/ our part is not knowing',¹⁶¹⁷ and in 'Whistling Swans', she asks, 'Yes, I know, God's silence never breaks, but is/ that really a problem?'¹⁸ Oliver's response to this state of unknowing is active. For example, in 'A Voice from I Don't Know Where', she writes: 'And you don't mind living with those questions,/ I mean the hard ones, that no one can answer?/ 'Actually, they're the most interesting.'¹⁹ In 'Where Does the Temple Begin, Where Does It End?', Oliver says: 'There are things you can't reach. But/ you can reach out to them, and all day long./ The wind, the bird flying away. The idea of God.'²⁰ Oliver is an ever-seeking explorer of the inner and outer worlds, who studies the landscapes of the mind through contemplation and meditation²¹ and the external world of nature through as direct immersion as it is possible. She loves to see, hear, touch, smell, and even taste the world around her²².

Oliver's contemplative approach to nature is reflected in her way of life in general. She often describes her days as simple, and the speaker of her poems is unattached to material possessions, money, society and wealth. In the poem 'In Blackwater Woods', Oliver writes: 'Sometimes I rest a little./ Then I gaze out from the yard/ into the world, or I gaze/ into myself./ But mostly I give attention/ to what I'm doing-/ cutting, chopping, stacking./ I have a good time.'²³ Simplicity

¹⁶ Oliver M., 2004, *Why I Wake Early*, Boston: Beacon Press, p. 5.

¹⁷ This acknowledgment of the unknowable resonates with the Buddhist concept of shunyata (emptiness) and the recognition that ultimate truths cannot be grasped intellectually but are experienced through mindfulness and spiritual insight. Oliver's "edges of knowing" represent the boundary between transient understanding and the eternal mysteries that underpin existence.

¹⁸ Oliver M., 2016, *Felicity*, New York: Penguin Press, p. 29.

¹⁹ *Ibidem*, p. 81.

²⁰ Oliver M., 2004, *Why I Wake Early*, Boston: Beacon Press, p. 8.

²¹ See, for instance, 'On Meditating, Sort Of' (in *Blue Horses*, 2016, p. 47), or 'Six Recognitions of the Lord' and 'On Thy Wondrous Works I Will Meditate' both in *Thirst*.

²² In 'Tom Dancer's Gift of a Whitebark Pine Cone' (in *Swan*, 2010, p. 8), the speaker eats a small pine cone her friend found 'in the scat/ of a grizzly'.

²³ Oliver M., 1994, *White Pine*, New York: Harcourt, Inc., p. 29.

and frugality of her existence is directly connected to the spiritual insight and imagination. In the poem 'Storage', the speaker encourages her readers to have 'More room in your heart for love,/ for the trees! For the birds who own/ nothing – the reason they can fly.'²⁴ She highly praises slowness which is a necessary condition for practicing attention and for 'seeing': 'What wonder and/ glory I would have missed had I ever been/ in a hurry!'²⁵ This attitude to life brings as its fruit personal happiness: 'to know/ our world/ is to be busy/ all day long/ with happiness.'²⁶ In 'The Old Poets of China', Oliver juxtaposes her strong desire for solitude and reclusiveness with the busyness of the world, which 'does not believe/ that I do not want it.'²⁷ It is the world of the old Chinese poets that she sympathises with, understanding 'why the old poets of China went so far and high/ into the mountains, then crept into the pale mist'²⁸.

Many of Mary Oliver's poems mention God, the soul, angels and prayers, and she alludes to the New Testament stories, such as the appearance of Jesus to Mary Magdalene at the tomb ('Spring' in *Evidence*) or multiplication of the loaves and fish ('Logos' in *Why I Wake Early*). It is not only that her poems contain the word 'prayer', but several texts *are* prayers, as when she addresses God directly in 'Clouds' (in *Why I Wake Early*) or in 'On Thy Wondrous Works I Will Meditate'²⁹. For Oliver, God is the Creator, to whom she is immensely grateful for the created world and her gratitude is expressed through her creative acts of seeing, observing, meditating and writing. As Oliver writes in her Foreword to the collection of essays *Long Life*, 'Writing poems, for me but not necessarily for others, is a way of offering praise to the world'³⁰.

Apart from Christianity, Oliver's poetry mentions other spiritual traditions. These include references to the Sufi mystics and poets Rumi³¹ and Hafiz, the Taoist poet Li Po³², and mentions of the Hindu god Shiva³³, Jainism³⁴ and Buddhism.

²⁴ Oliver M., 2016, *Felicity*, New York: Penguin Press, p. 31.

²⁵ Ibidem, p. 18.

²⁶ Oliver M., 2004, *Why I Wake Early*, Boston: Beacon Press, p. 37.

²⁷ Ibidem, p. 50.

²⁸ Ibidem, p. 50.

²⁹ Oliver M., 2006, *Thirst*, Boston: Beacon Press, p. 55.

³⁰ Oliver M., 2002, *Long Life*, New York: De Capo Press, p. xiv.

³¹ The medieval mystic and poet Rumi belongs to the most frequent traceable poetic inspirations of Mary Oliver and many references to his poems and personality can be found in Oliver's collections. See, for example, the poems 'I Am Pleased to Tell You' or 'Whistling Swans' in the collection *Felicity* (2016, p. 15, 29), or the poetic sequence 'The Return' in *What Do We Know* (2002, p. 7-10).

³² See the poem 'Of Time' in *Swan*, 2010, p. 2.

³³ See the poem 'To Shiva' in *Blue Horses*, 2016, p. 65-66.

³⁴ In *The Leaf and the Cloud*, 2000: 14.

The Concept of Impermanence in Buddhism and Its Implications in Mary Oliver's Poetry

Buddhism manifests in Mary Oliver's poetry both explicitly and thematically. First, there are poems which directly mention the Buddha, such as 'Spring'³⁵, 'Toad'³⁶ and 'The Buddha's Last Instruction'³⁷. Second, there is an identifiable affinity between Oliver's perception of life and certain ideas connected with Buddhist understandings of the world and humanity's place within it. These include the concepts of impermanence, 'liitless oneness'³⁸, non-clinging and doing things without attachment to gain³⁹.

According to Marco Pallis, 'The keynote of *samsara* is *impermanence*, the primary theme to meditate upon for every Buddhist'⁴⁰. Impermanence (*anicca*), along with *dukkha* (unsatisfactoriness) and *anatta* ('not-self') are the three qualities required to be seen and understood through direct experience⁴¹. These characteristics are the foundational qualities of all phenomena realized and taught by the Buddha.

Impermanence as a basic teaching of Buddhism means that 'all life is transient, constantly appearing and disappearing, constantly changing.'⁴² Signs of impermanence are evident in nature, and Oliver, as a keen observer, writes about them in her poetry. The poet's ever-present curiosity and keen observation allow her to deeply 'know' the world. As Ajahn Chah notes, 'The Buddha wanted us to know the world. Living in the world, we gain our knowledge of the world. The Buddha is said to be *lokavidu*, one who knows the world clearly.'⁴³ While the Buddhist notion of *anicca* emphasizes the transient nature of existence, Buddhism also acknowledges permanence through *nirvana*—an unchanging reality that transcends the cycles of birth and death. This interplay between impermanence and permanence is complementary rather than contradictory: impermanence teaches detachment and mindfulness, while permanence offers the assurance of eternal truths. Mary Oliver's poetry vividly illustrates this balance, as her meditative engagement with nature captures both its fleeting beauty and the timeless rhythms underpinning it. In these instances, Oliver's work does not merely echo Buddhist insights but reconstructs them through lyric form, raising questions about how language and metaphor function as spiritual practice. Her poems engage impermanence not only

³⁵ Oliver M., 1997, *West Wind. Poems and Prose Poems*, Boston & New York: Houghton Mifflin Company, p. 12.

³⁶ Oliver M., 1994, *White Pine*, New York: Harcourt, Inc., p. 38.

³⁷ Oliver M., 1990, *House of Light*, Boston: Beacon Press, p. 4-5.

³⁸ Liu Cheng-Wu, 2019, The Buddhist Doctrine of Impermanence and Its Literary Application. "*Journal of East Asian Literary Studies*", 8, 4, p. 89-102.

³⁹ Chah A., 1991, *A Taste of Freedom*, Berkeley: DharmaNet International, p. 85.

⁴⁰ Pallis M., 1981, *A Buddhist Spectrum. Contributions to Buddhist-Christian Dialogue*, New York: The Seabury Press, p. 4.

⁴¹ Chah A., 2011, *The Collected Teachings of Ajahn Chah*, Aruna Publications, p. x.

⁴² Katagiri D., 2007, *Each Moment Is the Universe*, Boston & London: Shambhala, p. 4.

⁴³ Chah A., 2011, *The Collected Teachings of Ajahn Chah*, Aruna Publications, p. 78.

thematically but formally, using poetic compression, juxtaposition, and temporal slippage as techniques of reflection and reframing.

Scholars like Robert Thayer Sataloff⁴⁴ (1997) have specifically highlighted the Buddhist influence on Oliver's work, particularly in her meditation on impermanence. Sataloff argues that Oliver's poetry echoes Buddhist principles, especially those centered on the fleeting nature of existence and the importance of mindfulness. Her attention to change, mortality, and the passage of time mirrors Buddhist contemplative practices that cultivate profound awareness of the transitory nature of all things.

Oliver's collection *House of Light* introduces the notion of impermanence in several ways, most notable through her repeated references to death, the inescapable fact of human existence and a moment of great unknowing. In her poem 'The Deer', for instance, Oliver writes 'Death isn't just an idea'⁴⁵. Nature constantly reminds us of death and the temporality of our existence. Observing the evidence of impermanence in the world around us, Oliver encourages us to understand that 'Each of us is given/ only so many mornings to do it – / to look around and love'⁴⁶. Significantly, Oliver sees death not as the end but as a continuation: 'When we die the body breaks open/ like a river; the old body goes on, climbing the hill.'⁴⁷ The continuity of life is further explored in the poem 'What Is It?', when Oliver writes: 'how could anyone believe/ that anything in this world/ is only what it appears to be – /that anything is ever final – / that anything, in spite of its absence,/ ever dies/ a perfect death?'⁴⁸

In *The Terns*⁴⁹, Oliver equates death with life, embracing both with similar acceptance: 'This is a poem/ about death,/ about the heart blanching/ in its fold of shadows/ because it knows/ someday it will be/ the fish and the wave/ and no longer itself–/ it will be those white wings,/ flying in and out/ of the darkness/ but not knowing it–'⁵⁰. She continues, 'this is a poem about loving/ the world and everything in it:/ the self, the perpetual muscle,/ the passage in and out, the bristling/ swing of the sea.'⁵¹ For Oliver, impermanence is not resisted but embraced as a natural and inevitable aspect of existence. Importantly, Oliver's treatment of impermanence is not confined to thematic content but is embedded in the very structure of her poems – through line breaks, white space, and rhythm, she mimics the fleeting quality of life. In this way, poetry becomes both meditation and

⁴⁴ Sataloff R. T., 2005, Mary Oliver's Spirituality: An Analysis of Her Relationship with Nature and the Divine. "Poetry and Spirituality Journal" 23, 4, p. 324-338.

⁴⁵ Oliver M., 1990, *House of Light*, Boston: Beacon Press, p. 24.

⁴⁶ Ibidem, p. 24.

⁴⁷ Ibidem, p. 24.

⁴⁸ Ibidem, p. 27-28.

⁴⁹ Ibidem, p. 64-65.

⁵⁰ Ibidem, p. 64-65.

⁵¹ Ibidem, p. 65.

manifestation. Her openness to the 'fold of shadows' echoes the Buddhist approach to life's transience, recognizing that the end of one cycle may lead to the realization of enduring truths. The imagery of 'flying in and out/ of the darkness' suggests a transition not into nothingness, but into a deeper, timeless reality.

One of Oliver's most well-known poems, *The Summer Day*, also addresses the notion of impermanence. Observing a grasshopper, Oliver marvels at the intricate details of its fleeting existence and connects this observation to a larger, enduring inquiry: 'Tell me, what is it you plan to do / with your one wild and precious life?' Here, Oliver invites readers to detach themselves from the habitual thought patterns and focus instead on the fundamental question of life. The transience of the grasshopper becomes a metaphor for our shared impermanence, while the question it inspires highlights universal, enduring truths about mindfulness and purpose. This juxtaposition echoes Buddhist insights into how impermanence can lead to contemplation of the eternal.

Oliver's imagery often conveys the eternal through the fleeting. In 'The Ponds', Oliver reflects on how nature exists in a state of flux. The ponds, ever-changing yet constant, symbolize life's impermanence while offering glimpses of stability. This interplay invites readers to find joy in transience while grounding themselves in life's deeper, enduring rhythms. While many of Oliver's poems exude optimism, joy and awe felt in the face of nature, the poet does not ignore the external social realities of the world. 'Still, what I want in my life/ is to be willing/ to be dazzled-/ to cast aside the weight of facts/ and maybe even to float a little/ above this difficult world,'⁵² she writes in 'The Ponds'. In 'Ich bin der Welt abhanden gekommen', the speaker describes her being in the world through the language of the paradox: 'my delicious dark happiness, / my heavy,/ bristling and aching delight/ at the world'⁵³. While Oliver is fully aware of suffering as part of man's existence, the poet desires, above all, 'to believe that the imperfections are nothing-/ that the light is everything – that it is more than the sum/ of each flawed blossom rising and fading'⁵⁴.

The poem which most directly relates to Buddhism in *House of Light* is 'The Buddha's Last Instruction'. The poem's title references the Buddha's final words: 'Make yourself a light'⁵⁵. Oliver connects this teaching to her daily observations of the sunrise. 'I think of this every morning, as the east begins/ to tear off its many clouds/ of darkness, to send up the first/ signal – a white fan/ streaked with pink and violet,/ even green.' Oliver juxtaposes the Buddha's deathbed scene, as 'he lay down/ between two sala trees'⁵⁶, with the continual renewal of sunrise, a universal symbol of life.

⁵² Ibidem, p. 59.

⁵³ Ibidem, p. 20.

⁵⁴ Ibidem, p. 59.

⁵⁵ Ibidem, p. 4.

⁵⁶ Ibidem, p. 4.

The movement of the sun represents change, impermanence and the flow of time. Significantly Oliver chooses the sunrise, the traditional and culturally universal symbol of birth and renewal, – rather than sunset, traditionally associated with dying and transience, to frame the Buddha's final teaching. In her poem, the Buddha is '[a]n old man', subject to impermanence like everyone else. Here, the poet highlights the idea that the Buddha was not free from painful and strenuous moments in his life. Yet, unlike others suffering the conditions of being, he was able, through his sustained efforts, to realize the enlightenment and fully see into the nature of man's life.

The Buddha's teaching of liberation and the importance of detachment and letting go⁵⁷ is alluded to by Oliver's description of the sun and its effect on her: 'Even before the sun itself/ hangs, disattached, in the blue air,/ I am touched everywhere/ by its ocean of yellow waves.'⁵⁸ Using the words 'disattached' and 'touched', Oliver playfully reminds us of the key idea of the Buddha's teaching on the ephemerality of mortal life and the necessity to 'let it go'.

In her poem, Oliver contrasts the immense and life-giving power of the sun, with the speaker's own insignificance: 'And then I feel the sun itself/ as it blazes over the hills,/ like a million flowers on fire–/ clearly I'm not needed'⁵⁹. This may be again seen as the poet's insight into the smallness and impermanence of human existence. For Oliver, however, man's insignificance is balanced by the permanence of love and connection, which endure beyond physical existence. In Buddhism, and in Mary Oliver's poetry also, this duality aligns with the practice of compassion – a love that transcends personal attachments and unites all beings in a shared reality. 'I feel myself turning/ into something of inexplicable value'⁶⁰, she writes in the poem, as she realizes the tranquillity and peace of the present moment, without anxiety over past or future. This convergence of doctrinal content and poetic image exemplifies how Oliver uses literature to mediate between experience and interpretation, subtly repositioning Buddhist philosophy within an affective and imaginative framework.

The poem's concluding line – 'He looked into the faces of that frightened crowd'⁶¹ – adds a profound layer of complexity to its meditation. through mindfulness on impermanence and compassion. What emerges is not a mimetic

⁵⁷ The idea of 'letting go' is mentioned in other poems by Oliver, too. For instance, in 'In Blackwater Woods' (in *American Primitive*, 1984), she writes: 'To live in this world/ you must be able to do three things:/ to love what is mortal;/ to hold it against your bones knowing/ your own life depends on it;/ and, when the time comes to let it go,/ to let it go.' In the poem 'Pipefish' (in *House of Light*, 1990, p. 37-38), Oliver writes, 'I would keep my whole life,/ and have–/ and let it go.'

⁵⁸ Oliver M., 1990, *House of Light*, Boston: Beacon Press, p 4.

⁵⁹ Ibidem, p. 4.

⁶⁰ Ibidem, p. 5.

⁶¹ Ibidem, p. 5.

rendering of doctrine, but a transformation of it – filtered through the lyric voice, the sensory moment, and the slow unfolding of perception.

The line evokes the image of the Buddha's final moments, emphasizing his connection to humanity even as he approached the end of his earthly existence. The 'frightened crowd' may represent the universal fear of change and mortality that binds all human beings. By looking into their faces, the Buddha offers a gesture of reassurance and solidarity, embodying the compassion that transcends personal suffering and mortality. This fusion of aesthetic form and ethical vision highlights how literature, particularly poetry, functions as a transformative space – one that not only reflects but intervenes in the emotional and philosophical dimensions of human experience.

For Oliver, this line serves as a bridge between the eternal wisdom of the Buddha and the everyday struggles of human life. It reminds readers that even amidst fear and uncertainty, there is a path to peace and understanding through mindfulness and compassion. The juxtaposition of the Buddha's calm gaze with the fear of the crowd reflects Oliver's overarching theme: that impermanence, when embraced, can become a source of liberation and connection rather than despair. This aligns seamlessly with the Buddhist teaching that to truly live, one must confront and accept the transient nature of existence.

By weaving the personal and the universal, the fleeting and the eternal, Oliver invites readers to find solace in the present moment and to extend compassion not only to themselves but to all beings. The poem thus becomes a meditation on both the vulnerability and the strength inherent in our shared humanity, echoing the Buddhist ideal of finding enlightenment through connection and detachment. In that sense, Oliver's poetry exemplifies how literature can bridge existential fragility with transcendental compassion – crafting a textual experience where impermanence becomes not a threat to meaning, but a doorway into it.

Conclusion

Mary Oliver's *House of Light* offers more than lyrical celebrations of nature – it constructs a contemplative poetics wherein literature itself becomes a vehicle for spiritual insight. Her meditations on impermanence echo Buddhist doctrines, yet they also exceed them, reimagining the role of poetry as a site of metaphysical questioning. Through her vivid engagement with the natural world, Oliver reflects on both the fleeting and the eternal, the transient and the transcendent.

This study has aimed to show that Oliver's use of impermanence is not simply thematic; it is formal and philosophical. Her poetry not only explores the reality of change and death but actively participates in shaping how we think about time, loss, and meaning. Literature, in this sense, becomes a space where Buddhist insights are not merely referenced but re-enacted- through structure, imagery and voice.

By attending to the complexity of how fiction (or poetry) relates to philosophical truth, this paper repositions Oliver not merely as a spiritual poet but as a literary thinker whose work challenges and expands our understanding of reality. Her work

reveals that impermanence need not be met with despair; rather, through poetic attention, it opens a path to compassion, connection, and peace. Poetry, for Oliver, is not an escape from impermanence but an embrace of it – a practice of presence that deepens the reader's engagement with the world.

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DOUBLE CONSCIOUSNESS UNVEILED: EXPLORING IDENTITY AND RESISTANCE IN AFRICAN AMERICAN YOUNG ADULT NARRATIVES

Abstract: This article explores the theoretical foundation and historical evolution of W.E.B. Du Bois's concept of double consciousness within the context of African American struggles against systemic inequality. Highlighting the trajectory of racial injustice and the socio-cultural challenges faced by Black Americans from the 1950s through the early 2000s, the study examines the lasting effects of segregation, discriminatory practices, and civil rights activism. By situating double consciousness within this historical narrative, the work illuminates its relevance in understanding both individual and collective experiences of marginalization. The Young Adult novels *The Hate U Give* and *Dear Martin* are referenced as vivid portrayals of the contemporary Black experience. These works not only highlight the persistent challenges faced by African Americans but also serve as essential guides for young readers, offering insights into navigating the complexities of dual identities and the demands of divided environments. This analysis affirms the continued importance of Du Bois's framework as a tool for examining and addressing the systemic barriers to racial equity.

Keywords: African American history, racial inequality, civil rights, W.E.B. Du Bois, double consciousness, YA fiction.

Streszczenie: Artykuł bada teoretyczne podstawy i historyczną ewolucję koncepcji podwójnej świadomości W. E. B. Du Boisa w kontekście zmagania Afroamerykanów z nierównościami systemowymi. Podkreślając trajektorię niesprawiedliwości rasowej oraz wyzwania społeczno-kulturowe, przed którymi stoją czarnoskórzy Amerykanie od lat pięćdziesiątych do początku XXI wieku, badanie analizuje trwałe skutki segregacji, praktyk dyskryminacyjnych i aktywizmu na rzecz praw obywatelskich. Umiejscawiając podwójną świadomość w tej historycznej narracji, praca rzuca światło na jej znaczenie w rozumieniu zarówno indywidualnych, jak

i zbiorowych doświadczeń marginalizacji. Powieści dla młodych dorosłych „The Hate You Give” i „Dear Martin” są przytaczane jako żywe portrety współczesnych doświadczeń czarnych. Utwory te nie tylko podkreślają ciągłe wyzwania stojące przed Afroamerykanami, ale także służą jako istotne przewodniki dla młodych czytelników, oferując wgląd w poruszanie się po złożoności podwójnej tożsamości i wymagań podzielonych środowisk. Analiza ta potwierdza ciągłe znaczenie ram Du Bois’a jako narzędzia do badania i eliminowania barier systemowych na drodze do równości rasowej.

Słowa kluczowe: historia afroamerykańska, nierówność rasowa, prawa obywatelskie, W.E.B. Du Bois, koncepcja podwójnej świadomości, literatura młodzieżowa.

Introduction

In 1903, in his seminal work *The Souls of Black Folk*, William E.B. Du Bois, African American scholar and activist, officially stated that “The problem of the Twentieth Century is the problem of the color-line.”¹ Disappointed with the Reconstruction era marked with efforts to improve race relations in the United States, Du Bois hoped the problem would be solved over the coming decades. Although the twentieth century has brought significant changes as a result of the Civil Rights Movement and the end of racial segregation, it has not entirely solved the problem of the inequality of races. Du Bois’s words are still relevant today when many Blacks experience discrimination in public and private spaces due to the color of their skin.

Du Bois’s concept of double consciousness proposed in the early twentieth century perfectly describes the inner feelings of many African Americans today and in the past. The term articulated the inner conflict faced by Blacks in reconciling their dual identities as Black and American within a society that dehumanized them. Du Bois’s philosophy provided a profound framework for understanding the psychological and social struggles of marginalized groups in racially divided societies. In his earlier sociological work, *The Philadelphia Negro* (1899), he utilized data-driven research to highlight the structural inequalities faced by Black urban communities, particularly the pervasive impact of the “color line.” This concept, which underscored much of his work, emphasized the enduring racial divide in American society and set the stage for his activism.²

Du Bois’s legacy lies in his ability to blend scholarship and activism, creating a lasting foundation for challenging systemic racism and envisioning a more equitable society. His concept of double consciousness stands as a profound tool for examining the psychological and social struggles of marginalized groups, offering insights that extend far beyond his era. This philosophy, as outlined in *The Souls of Black Folk*, continues to shape discussions on race and justice, particularly in understanding the systemic discrimination that has perpetuated inequality across generations.

¹ Du Bois, W.E.B., 1903 / 2009, *The Souls of Black Folk*, New York, p. 3.

² Shaw, S. J., 2013, *W.E.B. Du Bois and the Souls of Black Folk*, Chapel Hill, p. 163.

The concept of double consciousness

The concept of double consciousness, introduced by Du Bois in *The Souls of Black Folk*, serves as a profound lens through which the systemic challenges faced by Black Americans can be understood. Du Bois described this phenomena as the condition of “always looking at one’s self through the eyes of others, of measuring one’s soul by the tape of a twoness.”³ Central to this idea are three interrelated elements: the veil, twoness, and second sight. These components highlight the internal and external struggles of Black Americans living in a racially stratified society. Through the lens of Du Bois’s philosophy, the systemic barriers in employment, housing, voting, and education emerge as manifestations of the veil, while the experiences of Black Americans, reflect the dynamics of twoness and the power of second sight.⁴

One crucial area where the veil – a literal and figurative partition between Black and white Americans – has appeared is in employment discrimination. For many years, Black people were restricted to low-paying, dangerous professions and kept out of high-paying, prestigious positions. This institutional exclusion was a tactic of racial oppression intended to maintain inequality and the idea that white people are superior.⁵ The veil represented the systemic obstacles that prevented Black Americans from advancing economically in Du Bois’s paradigm. Black people were disproportionately affected by job losses, even during the Great Depression, when economic hardship was pervasive. Racial disparities in employment were exemplified by the “last hired, first fired” policy and the difference between Black and white employees in southern institutions.

Discrimination in the workplace is one area where the idea of twoness is most noticeable. Black Americans had to balance their two identities: as Black people who were often excluded from chances and as Americans looking for economic stability and success. They wanted to be part of the American economy, yet were viewed as outsiders, which led to a deep internal struggle. The psychological toll of being in a divided society is highlighted by the conflict between these two identities.

The resistance movements that arose in response to discrimination in the workplace demonstrate Du Bois’s concept of second sight. The “Don’t Buy Where You Can’t Work” campaign is a prime example of how Black communities organized boycotts and demanded change by using their understanding of systematic injustice. They were able to overcome the veil’s restrictions and exercise their agency thanks to this second sight, which ultimately helped thousands of Black laborers get jobs.⁶

³ Du Bois, 1903, p. 7.

⁴ Itzigsohn, J., and Brown, K. L., 2020, *The Sociology of W. E. B. Du Bois: Racialized Modernity and the Global Color Line*, New York.

⁵ Maloney, T. N., 2024, African Americans in the Twentieth Century. Economic History Association, <https://eh.net/encyclopedia/african-americans-in-the-twentieth-century/>.

⁶ Klein, C., 2018, Last Hired, First Fired: How the Great Depression Affected African Americans, HISTORY, <https://www.history.com/news/last-hired-first-fired-how-the->

Another striking illustration of the veil as a structural and metaphorical barrier is seen in the housing industry. Black and white areas were physically separated by practices like redlining, racial steering, and restrictive covenants, which strengthened segregation and reduced Black families' chances of achieving financial security and upward mobility. These discriminatory actions were a component of a larger system intended to uphold racial hierarchies, not isolated occurrences.⁷ The establishment of urban ghettos marked by poverty, crime, and restricted access to essential facilities, as well as the exclusion of Black families from attractive areas, are clear examples of Du Bois's veil. Here, the veil stands in for the structural obstacles that prevented Black Americans from obtaining suitable and safe homes, thereby sustaining cycles of marginalization and disadvantage.

Black families' hopes to achieve the American dream of homeownership despite being often denied it reflect the idea of twoness. As Black families attempted to fit in with a culture that disapproved of them, the conflict between being American and Black persisted. Once more, second sight was essential in the fight against housing discrimination. Black families' capacity to identify structural inequities and defend their rights was shown by court cases like *Shelley v. Kraemer*. They were able to demand fair treatment and oppose the discriminatory behaviors that maintained the veil by using their increased understanding of social systems. Even though Shelley's family had a successful outcome from the lawsuit, fair housing is still a problem.

The conflict of twoness that permeates Du Bois's ideology is brought to light by the fight for the right to vote. Every citizen's right to take part in the political process is represented by voting, which is a fundamental component of democracy. However, gerrymandering, poll taxes, and literacy tests were used to methodically deny Black Americans this privilege. In addition to denying Black people the right to vote, these procedures served to further solidify their inferiority complex. Twoness was most noticeable among Black Americans when it came to voting. Despite being Black, they were subject to systematic attempts to deny them the rights and advantages of citizenship, even though they were Americans. As they attempted to reconcile their experienced reality of exclusion with their identification as citizens, this contradiction caused a deep internal turmoil.⁸

The Voting Rights Act of 1965 serves as an example of how second sight may be used to break down structural obstacles. Black activists created grassroots initiatives to combat discriminatory practices because they were aware of the mechanics of oppression. They were able to lobby for legislative reform and negotiate the complexity of institutional racism because of this insight, which

great-depression-affected-african-americans.

⁷ Chang, A., 2018, Living in a poor neighborhood changes everything about your life, VOX, <https://www.vox.com/2016/6/6/11852640/cartoon-poor-neighborhoods>.

⁸ Evans, F., 2023, How Jim Crow-Era Laws Suppressed the African American Vote for Generations, HISTORY. <https://www.history.com/news/jim-crow-laws-black-vote>.

ultimately helped Black communities gain more political representation and power.⁹

Racial equality has long been fought in the field of education, which is a vital route to opportunity. The barrier between Black and white children is emphasized by the segregation of schools and the uneven allocation of resources. The veil denied Black children access to a high-quality education and prolonged cycles of inequality by acting as a symbolic as well as a physical barrier. The experiences of Black students who sought the same educational chances as their white counterparts but were often denied them demonstrate the idea of twoness. Their goals and the brutal realities of segregation were at odds because of their dual identities as Americans and Black people. This conflict is vividly illustrated by the Little Rock Nine. The attempt to integrate Central High School in 1957 symbolized the struggle to bridge the gap resulting in the symbolic veil.

Young Adult Fiction by Black Authors

Over the last few years the issue of racism and double consciousness have become central themes of African American young adult fiction. The literary genre, aimed at readers between the ages of 13 and 18, focuses on closing the divide between white and Black youth. In addition to acknowledging the bigotry that Black adolescents must deal with, these stories push white readers to examine their own privilege and prejudices. As Kaylee Jangula Mootz notes in her essay, “the embrace of Blackness is not without difficulty; the Black teens must repeatedly navigate the tensions between unapologetic blackness, characterized as belonging to the younger generation, and respectability politics, characterized as belonging to their parents’ generation.”¹⁰ Characters in these tales struggle to reconcile the conflicting aspects of living in a racist culture. They deal with the hard realities of systemic prejudice, racial violence, and police brutality. The unsettling realities of racial persecution are not avoided in YA fiction. It laments the loss of innocent Black lives due to police violence and draws attention to how victims are frequently portrayed in the media.

African American young adult fiction breaks down white supremacy and ignites fruitful discussions on racial injustice by highlighting the structural obstacles that prevent people from obtaining good education and finding work. Additionally, while reading each young reader reexperiences the reality of racial relations and racial violence in their life. As Mootz explains, “The genre implicitly, through the struggles and triumphs of the characters, and explicitly, through directive language like ‘we’ and ‘us,’ asks teen readers to use their voices to better the world.”¹¹ This suggests

⁹ Anderson, T. H., 2004, *The Pursuit of Fairness: A History of Affirmative Action*, New York, pp. 83-84.

¹⁰ Mootz, K. J., 2020, *Who Are These Books Really For? Police-Violence YA, Black Youth Activism, and the Implied White Audience*, in: R. Fitzsimmons and C. A. Wilson (eds.), *Beyond the Blockbusters. Themes and Trends in Contemporary Young Adult Fiction*, Jackson, p. 81.

¹¹ Ibid.

that social justice can be attained by pursuing the goal with shared unity. Every work in this genre introduces different approaches to achieving justice while inviting readers to explore the realities of Blackness.

This article analyzes two young adult novels which address readers of different races although the themes concern Black lives in America. Both of the books feature young characters who face racism as well as occasionally try to pretend that the problem does not concern them, thus experiencing the feeling of double consciousness.

Angie Thomas's *The Hate U Give* (2017) is one of the most popular contemporary YA novels that address racism and identity concerns. The main character, Starr Carter, witnesses her childhood closest friend Khalil being shot and killed. Because of this encounter, Starr isn't sure if she should speak up for a friend or keep quiet for her own safety. The racially discriminatory Williamson Prep school and the downtrodden Black community of the Garden Heights area are the two worlds that Starr's spirit is divided between. Starr discovers that her actual duty can only be fulfilled by fighting for justice for all, something she deeply believes in, as she attempts to negotiate the complexity of both worlds and her complex relationships with family and friends.

The novel is aimed at young readers, as the genre implies. However, because of its compelling examination of issues like racial injustice, identity, and activism, it might be found to resonate with readers of all ages. It is a narrative that highlights the tenacity and fortitude of its members while also shedding attention on the terrible reality that many Black communities experience. Readers from many walks of life are inspired and empowered by the journey that Starr takes. *The Hate You Give* is an enlightening and thought-provoking book that challenges readers' preconceptions about the continuous fight for racial equality.

Nic Stone's novel *Dear Martin* (2017) covers issues relating to police brutality, racism and double consciousness. Lost in his own thoughts, shortly after being abused by the police, Justyce writes to Reverend Martin Luther King Jr. in an attempt to understand the purpose of his life: "I wanna try to live like you. Do what you would do. See where it gets me."¹² When Justyce attempted to assist his ex-girlfriend, a white police officer racially profiled him in his final year at the esteemed Braselton Preparatory Academy. Through letters to MLK, Jus learns about the experiences of other youngsters who are similar to him and starts looking for his life's purpose. Throughout the novel, Jus tries to demonstrate that racial prejudice persists in all facets of society, despite the fact that many students at the prestigious school believe in racial equality. The murder of Justyce's best friend is the event that affects many people. The protagonist then faces a number of difficulties and conundrums. In the end, Justyce finds inner peace and a newfound sense of purpose after realizing true friendships and negotiating the complexities of police investigations. He is then resolved to keep working for racial equality and justice in his community.

¹² Stone, N., 2017, *Dear Martin*, London, p. 13.

Nic Stone offered his readers a book that addresses real-life problems faced by modern teenagers. The book deals with topics that people of various backgrounds may relate to, much as Angie Thomas did. In addition to illuminating the difficulties that young Black people encounter in contemporary society, Stone's work serves as a crucial reminder of the strength of solidarity, tenacity, and resilience in the face of adversity. Readers are encouraged by Justyce's journey to always speak up for what is right and to keep striving for a more fair and just society. For everyone who reads it, Stone's moving tale is a call to action, imploring people to face their own prejudices and endeavor to build a society that is more compassionate and inclusive of all.

The idea of double consciousness in YA fiction

Because they battle with the duality of their surroundings, the main characters of the novels find it especially difficult to get through these frustrating moments. In contrast to mostly white schools, where the characters fight to be true to themselves while being exposed to bigotry and injustice, there are Black communities, gangs, and loving and supportive families. These striking differences draw attention to the idea of double consciousness, in which people have to balance their personal identities with those of the society. The characters' experiences are greatly influenced by the community as they struggle with questions of race, class, and belonging in a complicated and sometimes hostile environment.

The main character of Angie Thomas's novel must alternate between her mostly white prep school and her Black neighborhood on a regular basis. Starr must carefully consider which aspects of herself to show when she transitions between these two worlds in order to blend in and prevent prejudice: "I just have to be normal Starr at normal Williamson (...) That means flipping the switch in my brain so I'm Williamson Starr."¹³ This constant balancing act takes a toll on her mental and emotional well-being, mirroring the daily struggles faced by many individuals who are caught between multiple cultural identities and societal expectations.

In Nic Stone's novel, peers' perceptions of Justyce McAllister were shaped by stereotypes. It is visible when Jared proposed that he and Manny dress up as a "Thug" and a "token Black guy" for Halloween. Justyce's subsequent experience at the party suggests that he finds it difficult to relate to his neighborhood and the atmosphere of Braselton Prep School. Justyce feels more and more alone and divided between two worlds despite his attempts to blend in and deal with the challenges of being a young African American guy in a school with a large white student body. After being racially profiled by a white police officer, Justyce writes to MLK. "How different would things have gone had I not been a black guy"¹⁴ – he asks in his letter to MLK after just being racially profiled by a white police officer. He feels a great deal of internal turmoil and uncertainty as a result of the pressure to fit in with

¹³ Thomas, A., 2017, *The Hate U Give*, London, p. 117.

¹⁴ Stone, 2017, p. 12.

stereotypes and cultural expectations. In the end, Justyce's difficulties draw attention to the pervasive problems with identification and belonging.

Angie Thomas illuminates the difficulties of having double consciousness and the value of social support in resolving these identity problems via her narrative. Nic Stone, on the other hand, presents her protagonist as someone who challenges the demands of the outside world with self-identity by showing letters that Justyce wrote to Martin Luther King Jr.

The power of stereotypes

African American young adult novels portray young protagonists' state of mind which is affected by racial stereotypes that society imposes on them. Thus, these young Black Americans are forced to cope with the duality of their surroundings. Both *Dear Martin* and *The Hate U Give* are unapologetically depicting the detrimental effects of racial hatred that has been present in the U.S. society for a long time.

In *The Hate U Give* Khalil is portrayed as a "thug" because of his purported ties to Garden Heights gang members. As was the situation with *Dear Martin*, the media combined Justyce's "thug" attire with Manny's participation at the Halloween party costumed as the "token Black guy." Characters like Khalil, Justyce, and Manny have been falsely accused due to the ongoing practice of classifying Black males as aggressive or dangerous, especially without any supporting evidence.

Williamson Starr has inherited the characteristics of the Black community because she was born and raised in a Black area. As a result, the insecure main character must deal with the very different aspects of her home setting compared to the school's. A lot of focus is placed on how she acts in the group, which she characterizes as being calm, kind, controlled, and carefully refraining from using slang: "Williamson Starr doesn't use slang (...), she doesn't say it even if her white friends do. Slang makes them cool. Slang makes her 'hood'. Williamson Starr holds her tongue when people piss her off so nobody will think she's the 'angry black girl.' (...) Basically, Williamson Starr doesn't give anyone a reason to call her ghetto."¹⁵ The main character makes a commitment in this remark to avoid being categorized according to prevalent preconceptions within the school community. Nevertheless, Williamson Starr, influenced by her white, racist friend Hailey, lets her emotions run wild when Hailey makes an insulting comment about Khalil toward the upset protagonist, leaving her terrified for her future and how she will be viewed at school following this incident. Fortunately, Starr's white boyfriend Chris allows Khalil to show both of her identities and learn how to integrate them to become who she truly is.

In *Dear Martin* Halloween party costumes are mentioned to depict the view of characters of color in the role of Justyce in a slightly different way. The concept and specific assignment of each outfit, particularly the Justyce and Manny costumes, illustrates how the characters are categorized by dominant prejudices at Braselton Prep school. Justyce does not realize that he is affected by prejudiced white

¹⁵ Thomas, 2017, p. 66.

coworkers until his Black "gang brother," Trey, alerts him to the fact: "These white boys might be standing here next to y'all, but y'all still ain't notin' but niggas to them, ya heard me?"¹⁶ During his conversation with SJ, Justyce keeps coming up with this thought: "What if, no matter what I do, the only thing white people will ever see me as is a nig - an 'n-word'?"¹⁷ At Braselton Prep, Justyce starts to doubt the sincerity of his ties and friendships, asking if his white peers genuinely regard him as an equal or only as a token Black student. Justyce realizes that society will always see him through the limited mirror of racism, regardless of how hard he works or how committed he is. Justyce is shaken by this realization, which causes him to reevaluate all of his beliefs about who he is and where he fits in the world.

Manny's personal experience of being categorized is presented to the audience as the plot progresses. The fact that his gang expected him to play basketball because Manny was tall and Black irritated him: "Yeah, I happen to be pretty good at it, but it's really not my thing."¹⁸ In fact, basketball did not in any way stir Manny's soul, and when he brought it up to his classmates, they reacted with racist remarks. The criticism that was directed at the characters of color caused them to have a twist of perception and affected how they saw themselves in the community.

The stereotypes shown in each book are only a small portion of the issues that every Black person faces on a daily basis. These have an impact on the characters' perceptions of themselves as well as those of others, resulting in both internal and external conflicts that they must resolve. The writers utilize these stereotypes to draw attention to the difficulties young people experience in today's society and the intricacies of identity building. They illustrate via their characters how outside factors affect a person's identity and how crucial self-awareness is to overcoming these challenges.

The struggle to end racial injustice

In the struggle for racial equality and justice in the U.S., the Civil Rights Movement – led by significant individuals like Martin Luther King Jr. – marked a turning point. The movement, which was based on civil disobedience and nonviolent resistance, opposed structural racism via significant events including the Selma to Montgomery marches, the Montgomery Bus Boycott, and the March on Washington. In addition to drawing national attention to the harsh reality of discrimination and segregation, these initiatives set the stage for important legislative accomplishments like the Voting Rights Act and the Civil Rights Act. The legacy of the movement, which is embodied in events such as King's famous "I Have a Dream" speech and the tenacity shown on Bloody Sunday, continues to motivate current campaigns for justice, such as the Black Lives Matter (BLM) movement. BLM addresses persistent racial injustices, structural oppression, and police brutality

¹⁶ Stone, 2017, p. 44.

¹⁷ Ibid., p. 49.

¹⁸ Ibid., p. 109.

in contemporary society while advancing the ideals of peaceful protest and action.

The United States has long been infected with police brutality, especially in African American neighborhoods, where unarmed Black people frequently die at the hands of law officers with no repercussions. One of the most important social justice movements of the twenty-first century, the Black Lives Matter movement, was sparked by high-profile incidents, such as the murders of Eric Garner, Michael Brown, and Trayvon Martin. BLM became an important voice for change in the struggle against racial injustice by confronting structural racism and holding law enforcement accountable.

Trayvon Martin's death in 2012 became a focal point for contemporary activism. George Zimmerman, a neighborhood watch volunteer who viewed Martin as suspect because of his color, shot and killed him. Zimmerman chased and approached Martin after police told him not to, which resulted in a deadly encounter. Using Florida's Stand Your Ground statute to defend himself, Zimmerman was found not guilty. Martin's passing raised awareness of racial profiling and institutionalized prejudices in the criminal justice system and sparked worldwide demonstrations, such as the Million Hoodie March. The campaign began when the words "Black Lives Matter" were initially used in a Facebook post following Martin's passing.

The Black Lives Matter movement was further energized in 2014 by the killings of Eric Garner and Michael Brown. White police officer Darren Wilson shot and killed Brown, a 19-year-old Black man without a gun, in Ferguson, Missouri. Outrage and demonstrations were sparked by his body being left in the street for hours, with the catchphrase "Hands up, don't shoot." Meanwhile, the brutality of police techniques was highlighted by Garner's death in New York City. Officer Daniel Pantaleo put Garner in a chokehold after confronting him for selling untaxed cigarettes. Garner was seen on camera repeating, "I can't breathe," over and over again, before passing away. These final remarks served as a call to action for demonstrations around the country.¹⁹

Massive protests were sparked nationwide after the killings of Brown and Garner brought attention to the widespread problems of institutional racism and police brutality. These and other events exposed long-standing racial inequities in the criminal justice system and law enforcement. People from all walks of life came together to demand justice and responsibility as a result of the outpouring of grief and rage, which spurred the creation of the Black Lives Matter movement.

The BLM movement continues to struggle for structural reforms that will make society more just and equal. The heartbreaking accounts of those killed by systematic racism and police violence highlight how urgently continued activity, lobbying, and reform are needed to remove the obstacles to racial justice in America.

In an effort to redefine Black identity in terms of equality and empowerment, BLM keeps up the battle by taking on the cultural narratives and organizational

¹⁹ Lebron, C. J., 2023, *The Making of Black Lives Matter: A Brief History of an Idea*, Updated Edition, New York, pp. 22-23.

institutions that support Black Americans' fractured identity. The necessity for African Americans to view themselves through the prism of both their own lived experiences and the stereotypes that the dominant society has imposed upon them is an example of double consciousness. Black Americans have felt alienated and powerless for decades as a result of this contradiction. Systemic discrimination, racial profiling, and police violence are examples of how institutional pressures perpetuate this dual perspective. Sociologist Patricia Hill Collins claims that these structural factors produce "controlling images" of Black people, especially as inferior, dangerous, or criminalized.²⁰ These stereotypes strip Black Americans of their autonomy and reinforce the external gaze that Du Bois described.

By validating Black lives as intrinsically valued and opposing narratives that degrade Black people, the BLM movement strongly confronts these social assumptions. "Say Their Names" and "Black Lives Matter" are two protest slogans that challenge the social gaze, reclaiming Black identity and debunking the idea that it needs to be interpreted via white viewpoints. According to academics like Ibram X. Kendi, these affirmations are essential to recovering Black subjectivity and dismantling the systematic reinforcement of double consciousness.²¹

Incorporating stereotypes is another aspect of double consciousness that can cause oppressed populations to feel inferior to other groups. By encouraging pride in Black history, accomplishments, and resiliency, BLM seeks to counteract this internalized oppression. In addition to addressing the outward signs of racism, movements such as Black Lives Matter enable people to integrate their multiple identities into a single sense of self. In order to address many levels of marginalization, BLM prioritizes the voices of Black people, especially those who are at the intersections of race, gender, and class, as demonstrated by Kimberle Crenshaw's intersectionality theory.²² BLM breaks down the social mechanisms that compel people to navigate their identities through a broken lens by elevating the perspectives and experiences of the underprivileged.

Final remarks

The concept of double consciousness, introduced by W. E. B. Du Bois, offers a profound framework for understanding the psychological and systemic struggles faced by African Americans, both historically and in contemporary society. Rooted in Du Bois's seminal work *The Souls of Black Folk*, this duality encapsulates the experience of navigating two identities – being Black and being American – within a society that marginalizes and dehumanizes Black individuals. From systemic barriers in employment, housing, education, and voting rights to the ingrained

²⁰ Collins, P. H., 1990, *Black Feminist Thought*, New York.

²¹ Kendi, I. X., 2019, *How to Be an Antiracist*, London.

²² Crenshaw, K., 1991, *Mapping the Margins: Intersectionality, Identity Politics, and Violence against Women of Color*, "Stanford Law Review," Vol. 43, No. 6 (July 1991), pp. 1241-1299.

stereotypes perpetuated by media and institutions, double consciousness serves as a lens for examining enduring racial inequalities. Du Bois's ideas of the "veil" that separates Black Americans from the dominant culture, the "twoness" of their existence, and the "second sight" that fosters awareness and resistance remain vital in understanding systemic racism. These ideas have found resonance in historic movements and achievements, from grassroots campaigns like "Don't Buy Where You Can't Work" to landmark legal victories such as *Shelley v. Kraemer* and *Brown v. Board of Education*, which collectively underscore the importance of collective action in dismantling structural barriers.

In contemporary literature, the enduring relevance of double consciousness is powerfully explored through young adult fiction, which examines the struggles of Black youth caught between contrasting worlds. Works such as Angie Thomas's *The Hate U Give* and Nic Stone's *Dear Martin* capture the internal and external conflicts faced by their protagonists, who navigate predominantly white spaces while maintaining ties to their Black communities. Starr Carter's journey to reconcile her identity between the privileged, predominantly white Williamson Prep and the working-class Garden Heights neighborhood highlights the psychological toll of balancing dual identities, mirroring Du Bois's notion of "twoness." Similarly, Justyce McAllister's reflections on systemic racism and his attempts to bridge the gap between his aspirations and society's prejudices reflect the enduring challenges of navigating a racially divided world. These narratives reveal how systemic oppression is perpetuated through media portrayals, societal expectations, and institutional biases, while also showcasing the resilience of Black youth in finding their voice and redefining their identity.

Ultimately, the journey from Du Bois's theoretical framework to contemporary struggles for racial justice underscores the enduring relevance of double consciousness as a tool for understanding and addressing systemic oppression. Whether through the fight for fair housing, equitable education, voting rights, or cultural representation, the challenges faced by African Americans are deeply rooted in a history of structural inequality that continues to shape their experiences. At the same time, the resilience and agency displayed by individuals and communities in confronting these barriers highlight the transformative power of resistance and self-definition. By examining these interconnected struggles – through the lens of history, literature, activism, and systemic analysis – we can better understand the complexities of racial inequality and the ongoing fight for justice. The work of Du Bois, the narratives of contemporary authors, and the activism of movements like Black Lives Matter collectively remind us that dismantling systemic oppression requires both individual and collective efforts to challenge the structures, stereotypes, and ideologies that sustain it. As the fight for equality continues, the lessons of double consciousness serve as a call to action, urging society to embrace not only the diversity of identities and experiences but also the shared humanity that unites us all.

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ŻÓŁW W LITERATURZE. MOTYW WOJNY, PRZEMIANY I PODRÓŻY

*Wielki żółw pływa za szybą machając nogami płaskimi jak skrzydła.
Grzyb półkulisty i twardy, od spodu złoty i miękki –
ma oczy sowy, dziób orla i trupie nozdrza straszydła,
a mech powiewa na jego tarczy w błyszczące sęki [...]*

M. Pawlikowska-Jasnorzewska, *Akwarium (III)*, w: tejże, *Złote myśli kobiety*, s. 215

Streszczenie: Celem artykułu jest ukazanie występowania motywu żółwia w prozatorskich utworach literackich. Analizuję obecność gadów w książkach pod kątem motywu przemiany człowieka w zwierzę i zwierzęcia w człowieka (*Pidgin i Theresa* C. Barkera, *Wielki Pan i żółw* M. Modrak, *Żółw Taraziego* T. Pułatowa), żółwia jako świadka działań wojennych, a przy tym symbol oporu wobec niemieckiego okupanta (*Znak żółwia* E. Paukszty, *Spod znaku żółwia* K. Steckiego, *Moje żółwie* I. Siwkowskiej, *Kinderszenen* J.M. Rymkiewicza) i gadów, wokół przetransportowania których skonstruowana jest fabuła powieści (*Żółwi dziennik* R. Hobana, *Żółwie w aerobusie* S.M. Grabowskiego). Żółw okazał się bogatym źródłem inspiracji i nic nie wskazuje na to, aby gad, który na dobre wkroczył do świata literatury, szybko miał z niej zniknąć.

Słowa kluczowe: gad, zwierzę, konflikt, proza.

Abstract: The purpose of this article is to show the motifs of turtle in prose literature. I analyze the presence of reptiles in the books, paying special attention to the motif of transformation of a human to an animal and an animal to a human (C. Barker's *Pidgin i Theresa*, M. Modrak's *Wielki Pan i żółw*, T. Pułatow's *Żółw Taraziego*), a turtle as a witness to a warfare and also a symbol of resistance to the German occupier (E. Paukszta's *Znak żółwia*, K. Stecki's *Spod znaku żółwia*, I. Siwkowska's *Moje żółwie*, J.M. Rymkiewicz's *Kinderszenen*) and reptiles whose transportation forms the novel's plot (R. Hoban's *Żółwi dziennik*, S.M. Grabowski's *Żółwie w aerobusie*). A Turtle turns out to be a rich source of inspiration and nothing indicates that the reptile which has entered the world of literature for good will disappear from it quickly.

Keywords: reptile, animal, conflict, prose.

Wiadomości wstępne

Celem niniejszych rozważań jest przeanalizowanie obecności żółwia w prozatorskich¹, wywodzących się z kręgu europejskiego dziełach literackich w odniesieniu do motywów wojny, przemiany i podróży. Powstały już prace adresowane do dzieci², traktujące o zawiłościach językoznawczych³ oraz o symbolice żółwia i roli, jaką odgrywał w kulturze i religii⁴. Wspomina się o żółwiu

¹ Spośród poetów, którzy upamiętnili żółwie znajdują się Czesław Miłosz (*Żółw*), Wisława Szymborska (*Sen starego żółwia*), Maria Pawlikowska-Jasnorzewska (*Akwarium III*), Wang Wei (*Biały żółw pod wodospadem*). W 1962 roku Aleksander Wat napisał poemat *Żółw z Oxfordu*.

² Między innymi: *Żółw Wiercipięta i inne zwierzęta* Agnieszki Frączak; *O żółwiu, który chciał spać* Roberta Aliagi i Alessandry Cimadoribus; *Żółw, który jada światło* Marii Kann; *Jak żółw Bursztynek szukał domu* Eryka Ostrowskiego i wiersze Jana Brzechwy (*Żółw i krokodyl*, *Zoo*). Warto także wspomnieć, że u Tuwima lokomotywa ruszyła „jak żółw ociężale”. Do starszych dzieci adresowana jest natomiast książka Wiktora Woroszyńskiego *Żółw, żaba, żbik*, a także *Momo* Michela Endego i *Alicja w Krainie Czarów* Lewisa Carrolla. Wspomnijmy jeszcze o komiksie *Polska akademia żółwi błotnych* Piotra Dziekanowskiego, Romana Kucharskiego i Mai Nawotnik i o słynnej bajce Krasickiego o żółwiu, co „zamknięty w skorupie niewygodnie siedział”.

³ Zob. Hasło żółw, [w:] J. Bralczyk, *Zwierzyńiec*, Warszawa 2019, s. 297; B. Stelingowska, *Sceny z życia żółwi. Żółw w kulturze, literaturze, języku oraz... w kuchni*, [in]: [https://www.researchgate.net/profile/Barbara-Stelingowska2/publication/376835485_SCENY_Z_ZYCIA_ZOLWI/links/658c02716f6e450f19a6a08c/SCENY-Z-ZYCIA-ZOLWI.pdf] [dostęp: 5 II 2024]. Żółw zaznaczył także swą obecność w przysłowiaach, żeby wspomnieć o afrykańskich („Żółw nie wypiera się swojej skorupy”; „Nikt nie mógł policzyć cętek na skórze leoparda. Żółw powiedział: są dwie, biała i czarna”, R. Bakun CM, *Mądrość afrykańskich przysłów*, Kraków 2005, s. 82, 35) i związkach frazeologicznych (np. „powolny jak żółw”).

⁴ Zob. E. Peter, *Gady – fakty i mity*, „Wiadomości Zootechniczne” R. LII (2014), nr 1, s. 92–99; D. Fajnsztejn, *Potwory fantastyczne w wierzeniach i mitach*, „Rozprawy, Materiały Wydziału i Towarzystwa Przyjaciół Nauk w Wilnie” 1938, t. IX, z. 3; R. Karczmarchuk, *Zwierzęta w kulcie, mitach i wierzeniach*, „Kosmos” 1996, nr 45 (1), s. 5; hasło: żółw, [w:] J.C. Cooper, *Zwierzęta symboliczne i mityczne*, przeł. A. Kozłowska-Ryś, L. Ryś, Poznań 1998, s. 321–324.

Mimo że przedmiotem rozważań jest piśmiennictwo europejskie, ze względu na osobę autora i znaczenie, jakie wywarł w literaturze światowej warto wspomnieć o *Matce żółwi z Zoologii fantastycznej* Jorgego Luisa Borgesa. Argentyński twórca opisuje, jak w II w. przed Chr. cesarz Jū Wielki podzielił kraj na dziewięć prowincji „odpowiednich dla cnót i rolnictwa” i że nakazał to władcy uczynić anielski żółw. Dalej czytamy, że „niektórzy twierdzą, że płaz ten [cóż, wybaczymy Borgesowi nieznajomość systematyki... – przyp. J.J.], rodzic wszystkich żółwi, był stworem z wody i ognia, inni podejrzewają, że z substancji jeszcze rzadziej spotykanej: ze światła gwiazd tworzących konstelację Strzelca. Na jego grzbiecie można było odczytać traktat komiczny pod tytułem *Hung-fan* (Reguła ogólna) albo też zobaczyć diagram dziewięciu rozdziałów tego traktatu, składającego się z białych i czarnych punktów”. J.L. Borges przy współpracy M. Guerrero, *Zoologia fantastyczna*,

nawet w świecie ekonomii i biznesu⁵; zaznaczył swój ślad także w botanice⁶ i geografii⁷, a nawet urbanistyce futurologicznej⁸. Brakuje natomiast prac poświęconych wspomnianym przeze mnie motywom, w związku z czym chciałabym tę panującą w humanistyce lukę uzupełnić.

To jedno z najstarszych zwierząt zamieszkujących Ziemię, o zadziwiającej anatomii i niespotykanej wytrzymałości fascynowało już w czasach antycznych, stając się przedmiotem anegdot (podobno Ajschylos zginął, kiedy orzeł opuścił mu na głowę trzymanego w szponach żółwia, myląc łysinę dramatopisarza ze skałą)⁹ i inspirując strategów wojskowych – formacja *testudo* (łac. żółw) oznaczała obronny szyk legionów rzymskich stosowany do ochrony przed ostrzałem¹⁰. Ponadto żółw jest bohaterem jednego z trzech najsłynniejszych paradoksów Zenona z Elei, który jako pierwszy zastosował zasadę „redukcji do absurdu” (*reductio ad absurdum*). Oto Achilles i żółw stają do wyścigu. Grecki wojownik daje zwierzęciu fory i rozpoczyna bieg dopiero wówczas, gdy zwierzę pokona dystans dziesięciu metrów. Achilles bez problemu przebiegnie ten odcinek, tyle tylko, że w tym czasie żółw przesunie się o kolejny metr. Goniący nie prześcignie gonionego, gdyż wcześniej musiałby się z nim zrównać – a zdaniem Zenona tak się nigdy nie stanie. Dystans

przeł. Z. Chądzyńska, Warszawa 1983, s. 105.

⁵ O czym świadczą pozycje wydawnicze: *Metoda żółwia. Jak zbudować trwałe fundamenty swojego sukcesu* (przeł. B. Mińska, Kraków 2022), której autor tłumaczy, dlaczego biorąc udział w rywalizacji jesteśmy przekonani, że trzeba pędzić, podczas gdy tak jak w znanej bajce, to żółw wygrywa wyścig, i jakie cechy dają mu przewagę nad konkurencją, oraz *Droga żółwia. Metody, dzięki którym zwykli ludzie stali się legendarnymi traderami* (przeł. P. Dąbrowski, Ożarów Mazowiecki 2018) Curtisa Faitha. Książka ta pokazuje, jak zarządzać kapitałem i zarobić pieniądze na spekulacji giełdowej.

⁶ Bylina żółwik ukośny (*Chelone obliqua*) z rodziny *Plantaginaceae* swą nazwę zawdzięcza kwiatom wyglądającym jak głowa żółwia.

⁷ W województwie zachodniopomorskim, w powiecie goleniowskim znajduje się wieś Żółwia Błoc, w powiecie pruszkowskim (mazowieckie) i międzyrzeckim (lubuskie) – wieś Żółwin, na mapie Polski odnaleźć też można dwie wsie Żółwiniec (powiat tucholski i elbląski), niewielką miejscowość Żółwiny w powiecie mogileńskim (kujawsko-pomorskie) i dwie wsie Żółwino w województwie zachodniopomorskim.

⁸ Pangeos – projekt pływającego miasta w kształcie żółwia mogącego pomieścić 60 tys. osób. Zob. <https://www.money.pl/gospodarka/plywajace-miasto-w-ksztalcie-zolwia-to-ma-byc-najwiekszy-jacht-w-historii-6836647607548608a.html> [dostęp: 29 VIII 2024].

⁹ Co wyjątkowo oddziałuje na wyobraźnię. Przekładowo, w *Gargantui i Pantagruelu* czytamy: „I oto szlachetny Nosodmuch wyzionął ducha tegoż samego ranka, i to w sposób tak szczególny, iż więcej mu się dziwić trzeba niż śmierci Eschylosa [...]” (F. Rabelais, *Gargantua i Pantagruel*, t. II, przekł., komentarze, wstęp T. Boy-Żeleński, Warszawa 1973, s. 80).

¹⁰ Motyw wykorzystano w popkulturze. W komedii *Asterix i Obelix kontra Cezar* z 1999 roku (reż. Claude Zidi) atakujący galijską wioskę Rzymianie tworzą charakterystyczny szyk wojskowy. Mniej fachowo, za to bardziej komediowo brzmią wydawane przez dowódcę komendy: „Formować żółwie!” i „Żółwie, do ataku!”.

pomiędzy nimi będzie się zmniejszał, lecz nie skurczy się do zera¹¹. Zdaniem Zenona żółw zwycięży w wyścigu.

Poszukiwanie żółwi w dziełach literackich zacząć trzeba od Biblii, a mówiąc dokładniej, od Księgi Kapłańskiej, gdzie wymieniony został jako zwierzę nieczyste¹². Święty Ambroży, nawiązując do zwyczaju nazywania liry χέλυσ (chelys, gr. żółw), od powszechnego używania skorup gadów jako płyt rezonansowych instrumentów muzycznych, nadał jej wymowę symboliczną:

Żółw bowiem za życia nurza się w błocie, a po śmierci skorupa jego służy do grania jako instrument tej wdzięcznej sztuki, rozbrzmiewający melodyjnymi dźwiękami w siedmiu tonach¹³.

W starożytnej Grecji znano natomiast mit o szelmostwach nowo narodzonego Hermesa, który ukradł Apollonowi stado wołów. W ramach rekompensaty podarował mu instrument zrobiony ze skorupy martwego żółwia, podrzucił i:

wydrążył go dłutem z siwego żelaza. [...] Przyciął na miarę łodygi trzciny, przeprowadził je przez grzbiet i przez skorupę żółwia i je umocował. Dalej naciągnął w swej przemyślności skórę wołową, wstawił ramiona i do obu ramion przymocował poprzeczkę. Naciągnął też siedem współbrzmiących strun z baraniego jelita...¹⁴.

Motyw ten poruszył też w *Dialogach bogów* Lukian z Samosat, najwięcej uwagi poświęcając, jak zauważył Kazimierz Korus, zabiciu żółwia i historii sporządzenia instrumentu muzycznego¹⁵. W *Wędrowkach po Helladzie* Pauzanasz wspominał natomiast mit o Skironie, attyckim rozbójniku, który czatował na skale na wędrowców, po czym zmuszał ich do umycia sobie nóg i strącał do wody, wprost w paszczę ogromnego żółwia¹⁶.

Spośród opracowań zoologicznych powstałych w starożytności wymienić można Αἰταὶ φυσικαὶ (*Aitai fysikai*) Plutarcha („żółw zaś przeżuwa lebiódkę po spożyciu

¹¹ N. Fearn, *Zenon i żółw. Jak myślał filozofowie*, przeł. M. Pawlikowska, Warszawa 2007, s. 31.

¹² Kpł 29.

¹³ Św. Ambroży, w: D. Forstner OSB, *Świat symboliki chrześcijańskiej*, hasło: żółw, przekł. i oprac. W. Zakrzewska, P. Pachciarek, R. Turzyński, Warszawa 1990, s. 312.

¹⁴ M. Jarczyk, *Wybrane aspekty mitu w „Hymnie homeryckim do Hermesa”*, „Symbolae Philologorum Posnaniensium Graecae et Latinae” 2013, XXIII/2, s. 19.

¹⁵ K. Korus, *Hymn do Hermesa, Elementy komiczne czy mim?*, „Wratislaviensium Studia Classica olim Classica Wratislaviensia” 2015, IV/XXXV, s. 40.

¹⁶ Pauzanasz, *Wędrowki po Helladzie*, s. 140, [in:] <http://biblioteka.kijowski.pl/antyk%20grecki/%20pauzanasz%20-%20w%20E4%99dr%E3%B3wka%20po%20helladzie%20ks.1-10.pdf> [dostęp: 20 II 2024].

Przy okazji można wspomnieć, że grecki geograf wspominał także o żółwiach indyjskich, cennych ze względu na pozyskiwaną z nich skorupę.

mięsa żmii”)¹⁷, *O właściwościach zwierząt* Eliana (gdzie autor odnotował, że żółw morski po odcięciu mu głowy w dalszym ciągu posiada zdolność widzenia)¹⁸ i *Zoologię* Arystotelesa, w której Stagiryta wprowadza rozróżnienie na żółwie pospolite (Χελώνη, chelōnē) i żółwie wód słodkich (ἑμύς, hemys), informując także o niewielkich rozmiarach śledziona u tych gadów¹⁹. Kilkanaście stuleci później, w tajemniczej, przypisywanej Francesco Colonnii *Hypnerotomachia Poliphili* widnieje ilustracja siedzącej kobiety w długiej sukni; dama unosi jedną nogę, zachowując jednak równowagę, co udaje jej się dzięki utrzymaniu w dłoni żółwiowi²⁰. Na gruncie polskim o żółwiach wspomnieli w wieku XVII Jan Jonston, autor monumentalnej, siedmiotomowej *Historia naturalis*. I chociaż w jednym miejscu zaliczył żółwie do *Crustacea rotunda* (skorupiaków okrągłych), w innym zaś – równie nieszcześnie – obok ślimaków i małży do szkarłupni, w pewnym sensie zrehabilitował się, kiedy odnotował fakt, że żółwie, podobnie jak krokodyle, są jajorodne²¹. W stuleciu następnym, w słynnych *Nowych Atenach* Benedykt Chmielowski nie poświęcił żółwiowi zbyt wiele uwagi, poza dość szczegółową informacją o znoszeniu jaj przez żółwie morskie; mimochodem wspomnieli o nich także przy opisie kameleona („[...] jeszcze powolniejszy daleko nad żółwia w chodzeniu, bo ledwo na łokieć przez dzień uczuł się”) i małpy („wielką ma antypatią, albo wrodzoną nienawiść z Żółwiem”)²². Pod koniec wieku XVIII Teodor Anzelm Dzwonkowski, wraz z flotyllą holenderską podróżując po wodach Archipelagu Malajskiego polował na żółwie, cenne z powodu poszukiwanego szylkretu²³.

Przenosząc się na grunt Europy Zachodniej warto wspomnieć o popularności spacerów z żółwiami; ok. roku 1849 wręcz do dobrego tonu należało przechadzanie się z tymi gadami po pasażach²⁴. Na karty literatury pięknej (epiki) wkroczyły jednak

¹⁷ M. Józwicka, *Z dziejów i źródeł „Traktatu przyczyny zjawisk naturalnych” Plutarcha*, „Analecta” R. XXX/2 (2021), s. 83.

¹⁸ Klaudiusz Elian, *O właściwościach zwierząt (wybór)*, przekł., wstęp i przypisy A.M. Komornicka, Warszawa 2005, 89-90.

¹⁹ Arystoteles, *Zoologia*, przekł. i komentarze P. Siwek, Warszawa 1982, s. 63.

²⁰ Zob. <http://www.rarebookroom.org/Control/colhyp/index.html> [dostęp: 12 II 2024]. Analizę wspomnianej ilustracji Monika Szejnert rozpoczęła książkę reportażową *Dom żółwia. Zanzibar* (Kraków 2011).

²¹ A. Matuszewski, *Popularyzacja nauki europejskiej w twórczości Jana Jonstona*, „Kwartalnik Nauki i Techniki” 2011, s. 60.

²² B. Chmielowski, *Nowe Ateny*, s. 228 i 232, [in:] <http://biblioteka.kijowski.pl/chmielowski%20benedykt/ateny.pdf> [dostęp: 12 II 2024].

²³ T.A. Dzwonkowski, *Pamiętniki: czyli pamiątka po ojcu dla Józefy z Dzwonkowskich Komornickiej*, Warszawa 1985, s. 94.

²⁴ E. Antosiak, „Spacer z żółwiem” – *Paryż w ujęciu Waltera Benjamina*, [in:] <http://www.appendix.ifil.uz.zgora.pl/archives/2005-1/antosiak.pdf> [dostęp: 13 II 2014]. Dziękuję Panu Profesorowi Wiesławowi Ratajczakowi za zwrócenie mi uwagi na tę kwestię.

żółwie dostojnie, oszczędnie zaznaczając swą obecność dopiero w XIX stuleciu (Żółwiciel [wg tłumaczenia M. Słomczyńskiego]²⁵ z *Alicji w Krainie Czarów*). Zdecydowanie bardziej przyjazny okazał się dla nich wiek XX, czego dowodzą m.in. *Żółwi dziennik* Russella Hobana i *Śmierć żółwia* Marka Nowakowskiego, po które sięgnęli twórcy filmu. Żółw stał się także pretekstem do ukazania prawd ważnych i uniwersalnych (*Żółwie w aerobusie* Stanisława Michała Grabowskiego, *Pidgin i Theresa* Clive’a Barkera, *Żółw Taraziego* Timura Pułatowa), symbolem dekadentyzmu (*Na wspak* Jorisa-Karla Huysmansa), innym razem wdzięczności (*Ogromny żółw* Horacia Quirogi) Z prawdziwym gadem łączy go czasem wyłącznie nazwa (kryminał *Śpiewający żółw* Zygmunta Zeydlera-Zborowskiego, *Gdy kręci się koło* Aliette de Bodard), może też skrywać się w cieniu warstwy stricte fabularnej i nie opuszczając ciasnych ram anegdoty (*Wszystko rozpada się* Chinuy Achebego, *Dziecko na niebie* Jonathana Carrolla, *Na grzbiecie żółwia* Williama E. Barretta), warstwę tę zdecydowanie ubogacić. Wreszcie jako bohater *Pomniejszych bóstw*, żółw rozbudował świat baśni i fantastyki, tworząc nieodłączną część literackiego uniwersum Terry’ego Pratchetta. W XXI stuleciu pod piórem Katarzyny Modrak powstał *Wielki Pan i żółw*; przemiana w gada symbolizuje tu moralny upadek i zanik człowieczeństwa.

Chociaż przywołane przykłady dowodzą licznej obecności żółwia w utworach epickich, raz jeszcze pozwolę sobie podkreślić, że w niniejszym artykule ograniczę się do trzech motywów łączących jego funkcjonowanie na płaszczyźnie literackiej. Będą to: wojna, przemiana i podróż.

Wojna

Żółw grecki (*Testudo hermanni*) w osobliwy sposób wpisał się w krajobraz wojny. W latach 1942-1944 Niemcy przywozili całe wagony tego gatunku, hodowanych głównie na zupę, jednak część trafiała do nielegalnej sprzedaży, część rozpełzła się po okolicy. Zdaniem Tomasza Szaroty, gady miały trafić do Rzeszy z Bułgarii lub Grecji, jak się wydaje – jako konserwy dla wojska, jednak handlarze związani z czarnym rynkiem odkupili od konwojentów kilka wagonów, nie wiedząc, że w środku znajdują się tysiące żółwi. Zwierzęta trafiły na uliczne targowiska²⁶. Jarosław Marek Rymkiewicz wspominał natomiast, że w 1943 roku do Generalnej Guberni trafiły tysiące, a nawet dziesiątki tysięcy gadów²⁷. Wszystko to spowodowało, że w czasie okupacji nie było trudno zdobyć żółwia greckiego, co

²⁵ Np. w tłumaczeniu J. Kozak Mock Turtle nosi imię À la Żółw, K. Dworaka – Nibyżółw, R. Stillera i M. Morawskiej – Fałszywy Żółw, B. Kaniewskiej – Niby-Żółw, Adeli S. – Żółwiozwierz, E. Tabakowskiej – Przeżuławacz. Na temat różnicy w tłumaczeniach imienia bohatera zob. artykuł Agnieszki Marii Seweryn, *Pomiędzy magią baśni a szeregiem skojarzeń, czyli kogo spotkała Alicja w Krainie Czarów*, „Porównania” 20/1 (2017), s. 219-236.

²⁶ T. Szarota, *Okupowanej Warszawy dzień powszedni*, Warszawa 1988, s. 230.

²⁷ J.M. Rymkiewicz, *Kinderszenen*, s. 146.

Polacy wykorzystywali, nie tylko, jak można podejrzewać, w celach kulinarnych, lecz niejednokrotnie trzymając je, pomimo ciężkich warunków, jako zwierzęta domowe. W tym kontekście z całą pewnością na uwagę zasługują: książka *Moje żółwie* Janiny Siwkowskiej, nietypowa pozycja w dorobku autorki, stanowiąca dowód fascynacji pisarki żółwiami greckimi, a przy okazji cenne świadectwo przeżyć wojennych i podróżniczych anegdot, oraz fragmenty *Kinderszenen* Rymkiewicza. Autor *Króla Mięsofusta* przyznał bowiem, że ze wszystkich wojennych wspomnień najbardziej w pamięci utkwiły mu właśnie gady.

Janina Siwkowska (*Moje żółwie*, 1985) po raz pierwszy zetknęła się z gadami w 1934 roku we Włoszech, skąd przywiozła do Polski Wergila – pierwszego z wielu żółwi, które przez całe lata z oddaniem hodowała. Wspomina Hamleta, Zuzę, Pacjenta, Florka, Tunisa i Piccolę, a czułość w stosunku do zwierząt skonstrastowana zostaje z okrucieństwem i cierpieniem okupacyjnej i powstańczej rzeczywistości. Ofiarą Niemców padają nie tylko bezbronni cywile (z tej perspektywy Siwkowska przedstawia swoją relację), lecz także zwierzęta. Kiedy po upadku Powstania Warszawskiego wraz z tłumem innych pędzono ją i jej męża do Pruszkowa, nieznamy chłopiec pomógł im nieść torbę z żółwiami. Autorka wspomina:

Noc w pruszkowskiej, wielkiej, nie oświetlonej hali fabrycznej była chyba najczarniejszą nocą na świecie. Wczesnym rankiem rozdzielono nas z Markiem, który przez całą noc nie rozstawał się z żółwiami, troskliwie opiekując się żółtą torbą. Rozłąka przyszła nagle. Wypchnięto nas za bramę ogrodzenia, kierując ku ustawionym na bocznicę kolejowej wagonom. Zrozumieliśmy. Mielśmy odbyć podróż w nieznane. Obejrzeliśmy się daleko, za ogrodzeniem, stał zdziwiony i jak przykuty do miejsca – mały chłopiec z żółtą torbą (...) Nigdy nie dowiedzieliśmy się, co się stało z Markiem i jaki los spotkał nasze żółwie²⁸.

Książka Siwkowskiej nie powinna jednak służyć jako poradnik współczesnego hodowcy żółwi, zważywszy np. na błędne zalecenia dietetyczne (żółwiom nie wolno podawać masła, kisielu, placka i chleba, co razi tym bardziej, że autorka obok tych produktów wymienia także te, które żółwie mogą jeść: mniszek, kapustę, liście rzodkiewki). W sytuacji, gdy nic innego nie byłoby pod ręką nie dziwiłaby desperacja właścicielki, pragnącej za wszelką cenę nakarmić zwierzę. Trzeba oczywiście wziąć pod uwagę, że mogła nie wiedzieć, iż żółwie greckie są co prawda bardzo łakome, ale także niezwykle wytrzymałe i przez długi czas mogą się obyć bez pokarmu. Należy również pamiętać, jakie lata Siwkowska opisuje. Nie znano wówczas zasad żywienia zwierząt egzotycznych, a o rzadkości hodowania żółwi w domach świadczy reakcja weterynarza, profesora Nagórskiego (1948 r.), który wprost przyznał, że nigdy wcześniej nie miał do czynienia z żółwiami i obawia się leczyć egzotycznego pacjenta.

W czasie wojny²⁹ opiekował się żółwiami również Jarosław Marek Rymkiewicz, który w *Kinderszenen* (2008) napisał:

²⁸ J. Siwkowska, *Moje żółwie*, Warszawa 1985, s. 37-38.

²⁹ <https://wiadomosci.wp.pl/1000-zolwi-na-paryskim-placu-6038687859540609g?ticaid=>

Oba żółwie, małego i dużego – mały był czarny, miał czarne łapy, czarną skorupę i czarny łeb; ale jego czerń była z niewielką domieszką żółci, na skorupie miał bowiem jakieś żółte kreski; duży był szarozielony, taką miał skórę i taką skorupę, choć jego szorstka skóra była wyraziściej szarozielona – oba żółwie, małego i dużego, pamiętam więc wyśmienicie³⁰.

Niedługo jednak przyszedł poeta cieszył się towarzystwem gadów; po przeprowadzce do Piaseczna pierwszy żółw uciekł z ogrodu, drugi wszedł pod szafę i zapadł w sen zimowy, z którego już się nie obudził. Można podejrzewać, że przyczyną była zbyt wysoka temperatura pomieszczenia. U żółwi, zwierząt zmiennocieplnych, kiedy zapadają w sen zimowy, metabolizm musi spowolnić. Warunkiem niezbędnym jest utrzymanie temperatury od 2-7 st. Celsjusza, w przeciwnym razie zwierzę zaśnie, ale funkcje życiowe organizmu nie ulegną spowolnieniu i w konsekwencji żółw po prostu zdechnie z głodu.

Dariusz Czaja zwrócił uwagę, że *Kinderszenen* to:

wywołane z pamięci historie wojenne widziane oczami dziecka, kontrapunktowane erudycyjnymi wtrętami dorosłego już człowieka. To narracje obsesyjnie skupione na szczególe, opowieści będące fascynującym połączeniem zapisów źródłowych i jednostkowej, więc niepowtarzalnej pamięci³¹.

Właśnie żółwie stanowią dla dorosłego już autora punkt odniesienia; Rymkiewicz pamięta między innymi trudny wówczas dla niego do zaakceptowania uczuciowy dystans, emocjonalne odgrodenie się zwierzęcia od dziecka. Szczególnie boleśnie wybrzmiewa to w kontekście ówczesnych realiów, strachu dziecka w kraju ogarniętym wojną:

Czy mój mały czarny żółw zdawał sobie sprawę z uczuć, którymi go obdarzałem? Bardzo wątpię. Wydaje mi się raczej (i wydawało mi się chyba również wówczas), że czarny żółw uformował się dla mnie w figurę obcości – rodzaj symbolu mówiącego mi, że różne wcielenia życia nie mogą się ze sobą kontaktować; że choć istota ich jest identyczna, to istota nie jest tym, co mogłoby je połączyć, umożliwić jakiś kontakt. To nie było miłe doświadczenie – jeszcze i dziś myślę o tym z przykrością³².

Mimo że żółw pozostaje niepojęty i niedostępny, a jego egzystencja zagadkowa, Rymkiewicz opisuje go z empatią, niemal antropomorfizując śmierć zwierzęcia. Gad reprezentuje wprowadzić porządek bliżej nieznanego twórcy *Kinderszenen*, niemniej

1c460 [dostęp: 30 I 2024].

³⁰ J.M. Rymkiewicz, dz. cyt., s. 145.

³¹ D. Czaja, *Miłoszem: zagadka żółwia*, [in:] <https://www.dwutygodnik.com/arttykul/1856-miloszem-zagadka-zolwia.html>, [dostęp: 20 II 2024].

³² J.M. Rymkiewicz, dz. cyt., s. 232.

jest to porządek wspólny dla wszystkich istot: dużych i małych, żywych i martwych, czy obdarzonych świadomością i jej pozbawionych³³.

Kinderszenen to nie jedyny utwór Rymkiewicza, w którym dał wyraz swej sympatii do wspomnianych zwierząt. Wbrew założeniom artykułu, nakazującym skupić się na utworach epickich, pozwolę sobie przywołać fragment wiersza poświęconego jednemu z siedmiu mędrców starożytnej Grecji, w którym autor dwukrotnie nawiązuje do mitu o Ziemi, opartej na pancerzach wielkich gadów: „To ja, Bias, mówię. Chodziłem po ziemi, / Którą dźwigały żółwie (...) Był Bias, co, gdzie potrzeba, będzie przemilczane. / Potem znów żółwie ruszył przed siebie,³⁴”. Jak widać, słowa Rymkiewicza, że najbardziej z całej wojny zapamiętał żółwie mogły mu także towarzyszyć przez całe późniejsze życie.

Analizując obecność motywów chelonologicznych w kontekście II wojny światowej nie sposób nie wspomnieć o książkach adresowanych do starszej młodzieży: *Spod znaku żółwia* Konstantego Steckiego (1979) i *Znaku Żółwia* Eugeniusza Paukszty (1961). Tytuł pierwszej nawiązuje do jednego z ówczesnych sposobów manifestowania oporu. Obsesja okupantów na punkcie żółwi greckich stała się bowiem pretekstem do malowania przez członków organizacji Wawer sylwetek zwierząt na murach jako symbolu sabotowania wroga³⁵, choć Czesław Michalski wspomina, że hasło „Stosuj tempo żółwia w pracy dla Niemców” dotarło do Warszawy drogą radiową przez BBC z okupowanej Francji w 1941 roku i w ogóle w tym kontekście przemilcza sprawę gadów transportowanych przez Polskę w celach kulinarnych. Obszernie przedstawia natomiast przebieg akcji „Żółw”, w którą zaangażowali się wawerczycy, a wśród nich zarówno utalentowani artyści, jak i tacy, którzy nie mając złudzeń co do swych talentów twórczych, opisywali, jak wspomina Michalski – kardynalskie kapelusze, miski i balie odwrócone do góry dnem czy apokaliptyczne bestie – „to jest żółw”. Rysunkom gadów towarzyszyły hasła: „Dla wroga pracuj powoli”, „Bądź powolny jak żółw pracując dla szkopów” czy „Pracując wolniej – przyspieszysz koniec wojny”³⁶. Akcja rzeczywiście cieszyła się wyjątkowym powodzeniem, a w *Kamieniach na szaniec* Aleksander Kamiński podkreśla, że Jan Bytnar „Rudy” jednego wieczoru namalował osiemdziesiąt żółwi³⁷. Można zatem zrozumieć decyzję Steckiego, że książkę opowiadającą o wojennych przeżyciach młodego chłopaka zatytułował właśnie *Spod znaku żółwia*.

³³ D. Czaja, dz. cyt.

³⁴ Zob. J.M. Rymkiewicz, *Bias z Priene*, [w:] tegoż, *Metafizyka*, Warszawa 1963, s. 19.

³⁵ M. Młynarski, *Nasze gady*, Warszawa 1971, s. 66.

³⁶ Cz. Michalski, *Wojna warszawsko-niemiecka*, Warszawa 1974, s. 168-170.

³⁷ „Rekordzistą żółwiowym okazał się Rudy. Przydały się tu jego zdolności rysunkowe oraz wymyślony przezeń schemat żółwia, łączący w sobie, jak z dumą mówił – ekspresję wyrazu i szybkość pociągnięcia kredą. Jednego wieczoru narysował Rudy ponad 80 żółwi! Koledzy, oglądając te rysunki, z uznaniem kiwali głowami nad wyjątkowym lenistwem, bijącym z sylwetek żółwi Rudego”. A. Kamiński, *Kamienie na szaniec*, Katowice 1995, s. 89-90.

Tak opisuje scenę malowania na murze znienawidzonego przez okupantów symbolu:

Aż przystanąłem! Wiadomo, żółwie są symbolem powolności. Mówi się przecież o „żółwym tempie”. Od tego na murze lenistwo aż promieniowało. Widać było, że ledwie się porusza, a miał tak znudzoną i rozleniwioną minę, aż mi się zachciało ziewać. Wykonawca, który miał chyba nie więcej lat niż ja, używał czegoś w rodzaju sporego szablonu czy może pieczęci. Nic więc dziwnego, że spotykane na murach „malunki” posiadały identyczny kształt i było ich wszędzie masę. Nikt nie miał wątpliwości, ani Polacy, ani Niemcy, co ów wizerunek sugeruje. „Pracuj wolno, w żółwym tempie”!³⁸

Żółwie okazały się dla Niemców przekleństwem, a krzycząca z murów przysłowiowa (choć całkowicie bezzasadnie)³⁹ powolność tych gadów zachęcała Polaków do sabotowania pracy pod kierownictwem okupantów.

W przeciwieństwie do powieści, w których pojawia się motyw żółwi malowanych na murach, powieść *Znak Żółwia* Eugeniusza Paukszty odsłania przed czytelnikami kulisy akcji o kryptonimie „Aktion Schildkröte”. Grupa młodzieży próbuje zbadać tajemnice ruin kryjących tajemnice z czasów II wojny światowej. W szafie pancерnej znajdują niemieckie dokumenty, wśród a wśród nich najważniejszy (nazwany przez okupanta „Akcja Żółw”), dotyczący likwidacji polskich wsi na Babimojszczyźnie i w Międzyrzeckiem. Młody archeolog mówi:

Adresowany do Vernichtungskommando SS. (...) Dąbrówka Wielkopolska, Nowe Kramsko, Podmokle Wielkie, Podmokle Małe. Pięć miejscowości. Tylko że różne sposoby (...) Ni mniej, nie więcej, tylko ludność Nowego i Starego Kramska ma być spędzona na jezioro. A potem armatami zaleca się rozwalić lód, aby wszyscy potonęli... Rozkaz mówi wyraźnie, że tyczy się zarówno mężczyzn, jak kobiet i dzieci. W Dąbrówce znowu tę samą rolę odegrać ma ogień, spalić wieś i wszystkich jej mieszkańców⁴⁰.

W powieści Paukszty motyw żółwia pojawia się zresztą kilkakrotnie; mały Benek hoduje żółwie błotne (*Emys orbicularis*), motorówka, którą chłopcy otrzymują w zamian za pomoc zostaje nazwana Żółwiem, a w pewnym momencie jeden z bohaterów stwierdza, że „przydały mu się wakacje spod znaku żółwia”.

Na zakończenie warto wspomnieć, że mimo upływu lat żółwie nadal kojarzone są z symboliką wojenną, czego dowodzi nietypowa instalacja z 2011 roku. Na paryskim placu Trocadero pojawiło się wówczas tysiąc białych żółwi zrobionych z wojskowych hełmów, co miało upamiętniać zwycięstwo aliantów nad

³⁸ K. Stecki, *Spod znaku żółwia*, Warszawa 1979, s. 125.

³⁹ Co udowadniają np. żółwie czerwonołone i młode żółwie greckie. Żółw lamparci Bertie, przedstawiany przez właścicielkę jako „najszybszy żółw świata” stał się natomiast gwiazdą brytyjskiego „Mam Talent”, zob. https://www.youtube.com/watch?v=4YCKBnGy8_kW [dostęp: 30 I 2024].

⁴⁰ E. Paukszta, *Znak żółwia*, Zakrzewo 2008, s. 358.

hitlerowskimi Niemcami i przypominać o „niekończącym się horrorze wojny”⁴¹. Można sądzić, że wystawa ta stanowi nawiązanie do hełmów Mk.3 fasowanych brytyjskim i kanadyjskim żołnierzom biorącym udział w lądowaniu w Normandii w czerwcu 1944 roku. Hełm, przypominający kształtem skorupę żółwia, nazywano żartobliwie Turtle.

Przemiana

Motyw przemiany człowieka w zwierzę znany jest już z utworów starożytnych, np. z tragicznej historii Prokne, Filomeli i Tereusa z Owidiańskich *Metamorfoz* czy z perypetii Lucjusza (Apulejusz, *Metamorfozy, czyli Złoty Osioł*). W świecie mitologii grecko-rzymskiej do przemiany dochodziło wskutek ingerencji bogów, za karę (Akteon) lub aby powstrzymać spiralę zemsty i przemocy (Prokne). W tzw. literaturze grozy wieków późniejszych motyw przemiany w zwierzę był (i jest) nadal wykorzystywany, żeby wspomnieć o wątkach likantropicznych w *Rodzinie wilkołaka* Aleksieja Tołstoja czy tytułowej Aelianie z opowiadania Bena Vincenta. Inaczej metamorfozę potraktował Franz Kafka; Gregor Samsa nie uległ przemianie w robaka wskutek działań magicznych. Jadwiga Clea Moreno-Szypowska dostrzega w nim Nowego Adama, który, napiętnowany przez najbliższych i odarty ze wszystkiego, co miał, mając poczucie wyrządzonej mu krzywdy nie próbuje zmienić planu Boga względem siebie⁴². Bez względu jednak na przyczynę metamorfozy, we wszystkich przywołanych przypadkach łączy ją naruszenie naturalnego porządku. Zaburzeniu ulega koncepcja świata, w myśl której ludzie funkcjonują obok lub wśród zwierząt, nie przekraczając jednak granicy własnej tożsamości.

W niniejszym podrozdziale omówię trzy sposoby przedstawienia motywu metamorfozy w odniesieniu do żółwia. Zacznę od przemiany człowieka w żółwia, następnie żółwia w człowieka, wreszcie skupię się na najbardziej wymagającej pod względem interpretacyjnym: przemianie człowieka w żółwia, na powrót w człowieka i znowu w żółwia. Za materiał ilustracyjno-literacki posłużą kolejno: *Wielki Pan i żółw* Małgorzaty Modrak, *Pidgin i Theresa* Clive’a Barkera i *Żółw Taraziego* Timura Pułatowa.

W *Wielkim Panu i żółwiu* (2016) przemiana w zwierzę jest karą za nieczułość, drwiny, pychę, arogancję i wywyższanie się nad poddanych. Władca uwielbiał krytykować innych, napawał się poniżaniem słabszych i zależnych od siebie; wiedział jednak, że gdyby tylko na jego drodze stanął ktoś silniejszy, bez oporu ugiąłby przed nim kark. Konkurencji jednak nie było. Drwiny z poddanych niejednokrotnie przybierały absurdalne formy, kiedy np. Pan, wąty i chorowity, wyśmiewał się prawdziwie silnych mężczyzn. Widząc władcę przechadzającego się po swych włościach, przerażeni ludzie ukrywali co brzydsze dzieci

⁴¹ Zob. <https://wiadomosci.wp.pl/1000-zolwi-na-paryskim-placu-6038687859540609g?ticaid=1c460> [dostęp: 4 VI 2024].

⁴² J. Clea Moreno-Szypowska, *Kafkowski tryptyk interpretacyjny: opowiadanie „Przemiana”*, „Tematy i Konteksty” 2021, nr 11, s. 563.

i niepełnosprawnych w domach, aby ich widok nie uraził oczu Pana, wszyscy też milkli, by nie kalać jego uszu niepotrzebnym hałasem. Władca budził w poddanych przerażający strach.

Katarzyna Modrak zaliczyła *Wielkiego Pana i żółwia* do *Zbioru baśni nowoczesnych*, nie dziwi więc pojawienie się morału. Pod osłoną nocy, na bagnach, Pan zaczął powoli przemieniać się w żółwia. Zamiast nóg i rąk wyrastały mu przypominające gadzie kończyny płetwy, zakończone twardymi pazurami. Miał ostre zęby i przeraźliwie syczał. Metamorfoza w żółwia nieodłącznie łączyła się z bólem:

Wstrząsany nagłymi atakami, przeżył się, próbując rozluźnić przykurczone mięśnie. Miotany potężną siłą, która płynęła z jego wnętrza, wił się w konwulsjach, które na jego nieszczęście nie zwiastowały śmierci. Powoli upadał w błoto, wsparty na dłoniach i kolanach, zastygał w spazmie. Na plecach tworzył mu się pancerz twardy i ciężki⁴³.

Najbardziej przerażająca nie była jednak przemiana w żółwia ani bagna i ciemność, lecz strach Pana, że kiedy „opuszczał siedlisko, gnębiła go myśl, że traci swe gadzie podwoje, a tylko w błocie nie czuł bólu i smutku. Bagna były jego domem”⁴⁴. W zbyt dużym bowiem stopniu zatracił w sobie człowieczeństwo, aby móc funkcjonować w świetle dnia, wśród ludzi i ich problemów. Zwraca uwagę wykorzystana przez autorkę gra słów: władcę opancerzał strach i buta, a to najgorsza z możliwych kombinacji. Ludzka zuchwałość i zwierzęcy strach przypieczętowały los Pana, bo nijak nie potrafiły zmieścić się w jednym ciele, choćby tak hybrydycznym i sfatygowanym⁴⁵.

Skorupa przytłoczyła go jako człowieka.

Im bardziej Pan pogrążał się w nienawiści i pysze, tym ciaśniej był tworzący się na skutek jego postępowania pancerz. Mimo widocznych ostrzeżeń Pan się nie zmienił, metamorfoza zaczęła się więc pogłębiać. Ostatecznie zakończył na bagnach życie. „Czas nie zna litości – czytamy – zwłaszcza dla nielitościwych. Każdą podłość ściga kara, a żółwie uciekają wyjątkowo wolno. Gdy miara się przebrała, Wielki Pan nie powrócił już z bagien. Człowiek-żółw przestał być nawet opancerzoną bestią”⁴⁶. Nie zakończył jednak życia jako gad, ponieważ nie potrafił uszanować żadnej żywej istoty. Po prostu przemienił się w kamień. Małgorzata Modrak zdaje się twierdzić, że zwierzę zasługuje na lepszy los niż zrównanie w momencie przejścia na przysłowiową drugą stronę ze skrajnie złym człowiekiem. Chroniąc żółwia, autorka skazuje Pana na skamienienie.

⁴³ M. Modrak, *Wielki Pan i żółw*, w: *Wielki Pan i żółw. Zbiór baśni nowoczesnych*, Lublin 2016, s. 57.

⁴⁴ Tamże, s. 58.

⁴⁵ Tamże.

⁴⁶ Tamże, s. 60.

W opowiadaniu *Pidgin i Theresa* Clive’a Barkera (1993) wskutek przypadku żółwica i papuga stają się przedmiotem anielskiej ingerencji. Mając świadomość, że zaskakująca metamorfoza nie jest zgodna z odwiecznym, ustalonym porządkiem świata, decydują się na ucieczkę. Przemiana łączy się z aktem poznania i akceptacją tego stanu („Jestem człowiekiem – stwierdza Pidgin. – Jezu, jestem człowiekiem”)⁴⁷ i uwrażliwieniem zmysłów. Świadomość nagości, empatia i poczucie humoru to cechy Theresy obdarzonej pierwiastkiem wyższym, czego nie знаła, przez wiele lat zamknięta w żółwiej skorupie, wiodąc spokojną egzystencję w kartonowym pudełku. Wspomnieć też trzeba o jej zachwycie nad *Requiem*:

Ale nawet gdyby Theresa zrozumiała, o co mu [Pidginowi – J.J.] chodzi, i tak byłaby głucha na jego słowa, bo zawładnął nią ogrom *Requiem* (...); sześćdziesięciu może chórzystów zgromadziło się przed ołtarzem, śpiewając pieśń śmierci. Theresa odwróciła się i spojrzała na niego [Pidgina – J.J.], jej ciemne oczy wypełnione były łzami.
– Czyż to nie piękne – zapytała?⁴⁸

Pidgin poszukuje łatwiej dostępnych źródeł ekscytacji; zdecydowanie większą przyjemność od słuchania muzyki klasycznej sprawia mu pochłanianie zawartości butelki wiśniówki. Niemniej kiedy Theresie zagraża niebezpieczeństwo ze strony anielscy Sophus Demdarity zaczyna rozumieć, że bez przyjaciółki u boku sam sobie nie poradzi; jednak nie tylko wyrachowanie nakazuje mu ruszyć jej z pomocą. Nieświadomie zaczyna żywić do niej głębsze uczucie, co objawi się w scenie przed ołtarzem, kiedy dotychczas pewny siebie Pidgin, przygotowując się na śmierć, zapyta nieśmiało, czy towarzyszka weźmie go za rękę. Theresa spełni jego prośbę i uśmiechnie się ze słodyczą.

Pidgin i Theresa nie pamiętają odczucia cierpienia i przerażania, jakie ich ogarnęło w momencie, gdy Sophus Demdarita popełniła fatalną pomyłkę i to na nich skierowała strumień anielskiego światła, skutkiem czego doświadczyli metamorfozy. Barker zdecydował się, mimo że na enigmatyczny, opis zdarzenia, dzięki czemu czytelnik emocjonalnie towarzyszy bohaterom od pierwszych chwil ich nowego życia, mówiąc inaczej – ponownych narodzin. To przed oczami Raymonda, właściciela zwierząt, Sophus Demdarita rozpościera obrazy z przeszłości, na których widać jak: „papuga miotła się jak szalona, wypadały z niej pióra, a ciało pęczniało i kipiało. Skorupa żółwicy pękła, nie mogąc pomieścić jej coraz większego i coraz bardziej ludzkiego ciała”. Pękający pancerz symbolizuje bóle rodzenia; narodzi się nowa Theresa, która, nie pamiętając dokładnie („zostaliśmy jakoś odmienieni w jego [anioła – J.J.] obecności”)⁴⁹ samego momentu powtórnego przyjścia na świat, zachowa w pamięci obrazy z dawnych lat, kiedy

⁴⁷ C. Barker, *Pidgin i Theresa*, przeł. J. Skowroński, Poznań 2022, s. 109.

⁴⁸ Tamże, s. 118.

⁴⁹ Tamże, s. 109.

wraz z Pidginem byli zwierzętami. Ciągłość pamięci zachowa również jej towarzysz, co udowodnił, szczegółowo relacjonując przebieg dziwnych „spotkań terapeutycznych”, w jakich uczestniczył ich dawny właściciel.

Ceną za pozyskanie człowieczeństwa jest szkaradny wygląd Theresy, co stało się zresztą także udziałem papugi. Po przemianie pozbawiony piór Pidgin cierpiał z powodu świądu, był chudy, miał haczykowaty nos i parchate ciało. Theresa natomiast, osiągnąwszy niemal półtora metra wzrostu, miała szarą głowę i krabie, łuszczące się ręce, była „łysa i nadzwyczaj szpetna, a ciało miała pomarszczone i łuszczące się, jak u starców”⁵⁰. W początkowej fazie po metamorfozie oboje instynktownie dążą do odzyskania zwierzęcego wyglądu. Pidgin wyjmuje z garderoby dawnego właściciela „najlepszy odpowiednik swoich piór, jaki zdołał znaleźć”, jednak jego wysiłki idą na marne; o ile dawniej grzbiet papugi był źródłem jego dumy, o tyle teraz przypomina kombinację pstrokaczyny i tłuszczy. Theresa próbuje wypełnić lukę po karapaksie, „piętrząc sobie nad krzyżem tyle grubych okryć i swetrów (wszystkie szare albo zielone), że wyglądała na niemal dwakroć cięższą, niż była w istocie”⁵¹. Scena ta ilustruje wątpliwości, jakie w tym momencie targają bohaterami. Nieumiejętność samookreślenia, kim: ludźmi czy zwierzętami, naprawdę są, trwa jednak tylko przez chwilę. Od tej bowiem chwili w zachowaniu bohaterów nie będzie już śladu nawiązania do zwierzęcej przeszłości. Pełnię czysto fizycznych ludzkich zachowań zademonstrują, kiedy wzorem innych napotkanych wieczorem par, szepcząc czułe słówka, objęci ramionami podążą w stronę ustronnego miejsca, aby oddać się miłości.

Sytuacja komplikuje się w *Żółtciu Taraziego* Timura Pułatowa (1989), niezwyklej historii mędrca, a przy tym zapalnego chelonologa, przywracającego (choć nie na stałe) ludzką postać człowiekowi, który uległ przemianie w wielkiego gada. Powieść składa się z trzech części. W pierwszej czytelnik jest świadkiem perypetii Bessaza-żółtwa, w drugiej słuchaczem dziejów opowiedzianych przez istotę po kilku sześciu miesiącach intensywnej kuracji (pół żółtwa i pół człowieka), w ostatniej obserwatorem: początkowo – wydawać by się mogło, zakończonej pełnym sukcesem terapii, ostatecznie – zjednoczenia Bessaza, zarówno w sferze fizycznej, jak i psychicznej, ze światem żółwi. Wskutek przypadku losy podróżnika i żółtwa splatają się ze sobą; Bessaz dostrzega w uczonym jedyną szansę ratunku, gdyż wie, że tylko Tarazi zdoła spojrzeć na całą sprawę zarówno od strony naukowej, jak i religijno-metafizycznej.

Interesującym zabiegiem fabularnym jest wyjaśnienie, dlaczego kupiec Bessaz uległ metamorfozie w gada. Winne było Przeznaczenie, skaza rodzinna, która u ojca Bessaza objawiła się zaledwie żółwią skórą, czarną i pomarszczoną, u niego natomiast, ostatniego z rodu, przybrała pełną postać.

W naszej rodzinie przekazywano sobie z ust do ust, że nasz ród wywodzi się od żółtwa. W roku żółtwa urządzaliśmy zabawę, wszyscy tańczyli dokoła ogniska,

⁵⁰ Tamże.

⁵¹ Tamże, s. 112.

uderzając w żółwie pancerze jak w bębny, i pełzali na czworakach z zawiązanymi oczami, uderzali się czołem w czoło... [...] okazało się, że wszyscy nosimy na sobie piętno, żeby przyroda nie zapominała przywracać nas praojcu – Żółwiowi... A ja akurat okazałem się ostatni z kolei i, widzicie, utraciłem wszystko, co ludzkie...⁵² – tłumaczy Bessaz Taraziemu. Wobec Losu i prawa krwi mędrzec jest bezradny. Wie, że prędzej czy później Przeznaczenie upomni się o swoje prawa.

Podobnie jak w *Pidginie i Theresie*, przemiana łączy się z bólem. O ile jednak w opowiadaniu Barkera bohaterowie nie będą pamiętać cierpienia, zyskają natomiast człowieczeństwo, czas nie zatrze obrazów męki w pamięci Bessaza. Różnica polega też na tym, że w przypadku papugi i żółwicy przemiana była aktem jednorazowym, w odniesieniu do Bessaza bardziej odpowiednim słowem jest rozciągnięty w czasie proces przemiany. Pierwszym zwiastunem przeobrażenia był ogon:

Opuchlizna nieco się zmniejszyła, lecz tylko na górze pleców, natomiast od kości ogonowej do pasa zaznaczała się wyraźnie twarda linia, która już na drugi dzień, oddzieliwszy się, luźno zwisała – był to ogon⁵³.

W tamtym momencie kupiec bowiem jeszcze nie wiedział o rodzinnej skazie i wierzył, że znachorzy z Bucharu nieszczęsną część ciała po prostu utną. Później, czego skutek zaafierowania początkowo nie zauważył, spuchły mu nogi i ręce, a skóra na plecach zaczęła twardnieć. „Moje ciało skręcało się, zmieniając kształt (...) nie mogłem chodzić, tylko pełzałem na czworakach”⁵⁴ – wspominał. Pochłonięty własnymi sprawami nie zauważył, że wzięty przez niego na służbę przewrotny Farruch poznał rodową tajemnicę i tylko czekał, aby los Bessaza się dopełnił, by przejąć jego pieniądze. Niby przypadkiem dotykał kijem pleców kupca sprawdzając, czy zmieniły się już w karapaks.

Żółw miał czarny język i był bardzo duży („ważył nie mniej niż osiem pudów”, był „o rozmiarach człowieka średniego wzrostu”), lecz jego wielkość nie stanowiła wystarczającej ochrony przed agresją zabobonnych mieszkańców. Dopóki nie znalazł się pod opieką Taraziego, wieśniacy ciskali w zanurzonego w błocie żółwia kamieniami i kijami, zarzucili na niego sieć, przekonani, że potworna istotna jest zwiastunem nieszczęścia: dżumy, suszy lub wojny. Dowiadujemy się także (co, nawiasem mówiąc, nie jest zgodne z prawdą), że był „głuchy jak wszystkie żółwie”. Początkowo nawet doświadczone oko chelonologa nie dostrzegło w nim niczego niezwykłego poza nadnaturalnymi rozmiarami. Szczegółowy opis zwierzęcia niewiele pozostawia wyobraźni czytelnika:

⁵² T. Pułatow, *Żółw Taraziego*, przeł. A. Bogdański, Warszawa 1990, s. 159.

⁵³ Tamże, s. 141-142.

⁵⁴ Tamże, s. 158.

Kopuła jego pancerza, wygięta ku dołowi, na zaokrągleniu brzucha, jasnobrązowa, z głębokimi czarnymi bruzdami, przypominała misy z masy perłowej. Pokryte łuskami grube łapy mógł chronić jedynie podginając je pod siebie, głowę, jak wszyscy jego krewniacy, chował wciągając ją pod pancerz – jednym słowem, nie było w nim nic niezwykłego poza długością...⁵⁵.

Po sześciu miesiącach intensywnej kuracji chelonolodzy mogli już zaobserwować pierwsze efekty. Kiedy weszli do pokoju Bessaza, ten dotykał łapą podbródka:

Lecz tego, czym dotykał pyska, nie można już było nazwać łapą. Przypominało to rękę, chociaż nie miała ona całkowicie kształtu ręki ludzkiej – palce, dłoń oraz całe przedramię, aż po sam bark, pokrywała jeszcze czarna, łuskowata skóra, natomiast pancerz, który sam odpadł, wałał się w rogu pokoju, obnażywszy smagłą skórę na grzbiecie żółwia. Jeśli nie brać po uwagę ludzkiego głosu, który zwierzę odzyskało, w żółwiu wszystko było takie samo jak dotąd. Ogon przeszkadzał mu, gdy żółw siedział, opierając się o grube słoniowe łapy; sam pysk też nie zmienił się ani trochę⁵⁶.

Pół żółw i pół człowiek stał się dla służącego Abitaja kimś w rodzaju bożka i towarzysza hulanek w jednym. Ubrany we frak, zanudzony elegancką konwersacją z chelonologiem, pod wieczór zaczynał hołdować instynktom niższemu. Przy alkoholu był „po chamsku ordynarny, bezceremonialny, pijany; jednym słowem – odprężał się całkowicie”⁵⁷. Czuł wyższość nad Abitajem, traktując go z jednej strony jako współuczestnika pijackich orgii, z drugiej jednak w stosunku do służącego czuł się tak, „jak na pewno czuje się człowiek, sprzedający po przystępnej cenie złoto i podłóść, na które jest popyt”. Najbardziej intymne szczegóły z życia, którymi musiał się za dnia podzielić z Tarazim, podczas wieczornych zwierzeń czynionych pijanemu Abitajowi nie wydawały się już Bessazowi poniżające.

Skutkiem przywrócenia Bessazowi ludzkiej postaci był widok, jaki ukazał się oczom podekscytowanych chelonologów. Oto:

Przygarbiony mężczyzna, wąty, z zarysowującym się pod chałatem brzuszkiem, napełnionym dzięki staraniom Abitaja, stanął przed naszymi testudologami. Pospieszenie naciągnął przez wyłysiałą głowę koszulę, kiedy wszedł Tarazi i Armon, i musieli niecierpliwie czekać, żeby ujrzeć jego twarz, która nieoczekiwanie okazała się miłą, aczkolwiek surowa, ozdobiona szpakowatymi wąsami⁵⁸.

Ostatecznie Bessaz na powrót staje się żółwiem. Przez jakiś czas, kiedy nie zatracił jeszcze umiejętności mowy, zostaje przez dawnego prześladowcę Farrucha zmuszony do pracy w cyrku jako gadający żółw. Na powrót niemy przystaje do grupy żółwi i zaczyna wieść życie typowego przedstawiciela rodziny *Testudinidae*.

⁵⁵ Tamże, s. 36.

⁵⁶ Tamże, s. 76.

⁵⁷ Tamże, s. 118.

⁵⁸ Tamże, s. 160.

Ulegając pierwszej przemianie w żółwia Bessaz zachował duszę (zresztą Tarazi używa w stosunku do przemiany terminy *tasanuch* – wędrówka dusz) i rozum człowieka, i to właśnie zwróciło szczególną uwagę uczonego. Podczas wspólnej wędrówki żółw robił wszystko, aby nie przeszkadzać opiekunowi („żeby niczym nie wywołać niezadowolenia podróżnika”), rozumiał, czego ten od niego oczekuje („był nad podziw domyślny”), wyrażał uczucia („wciągnął łeb pod pancerz, jakby się wstydził swojej ciekawości”, „z poczuciem winy wetknął pysk w piasek”, „rzucił wystraszone spojrzenie w stronę warana, jakby prosząc swego pana, by mu wybaczył tchórzostwo”, „był skłonny do pochlebstwa i umizgów”), potrafił maskować swoje odczucia i zachowanie („wygodniej rozciągnął się na słomie i udawał, że śpi”, „udawał, że wszystko, co się dzieje, jest mu najzupełniej obojętne”, „sztuka udawania wydała się Taraziemu czymś niezwykle dla tak prostego, powolnego stworzenia...”), a na nawet wydobył z siebie ludzki głos („westchnął”; „zdradziło go ciężkie, rozpaczliwe westchnienie”), co pozostaje w wyraźnej opozycji do charakterystycznego, wydawanego przez podrażnione nagłym bodźcem żółwie odgłosu psykania. Dopiero kiedy na stałe zyskał zwierzęcą postać, w jego umyśle zaczęły zacierać się obrazy z przeszłości. Został przewodnikiem żółwiego stada i w takiej roli spotkał go po latach Tarazi:

Kilka żółwi wypelzło z jamy, wyruszając na połów węży. I Tarazi ujrzał, że idą za znajomym żółwiem, który był ich przywódcą. Tarazi zeskoczył z konia i lekko chwycił zwierzę za łapę. Żółw legł potulnie i pozwolił się obejrzeć, i nie przypochlebiał się już, nie wywraçał ze zdumienia oczami, i Tarazi pojął, że żółwie nauczyły go zachowywać się jak normalne zwierzę. W końcu, po ucieczce od swoich nowych panów, uwolnił się od wszystkiego, co ludzkie, nie czuł bólu, nie wiedział, co to chytrość, pochlebstwo, a raczej znał to wszystko w innym, żółwim wydaniu...⁵⁹

Co ciekawe, podejmując próbę przywrócenia Bessazowi ludzkiej postaci Tarazi postępuje według procedur medycznych. Nie ma mowy o czarach czy alchemii; zamiast tego mędrzec ustala wzór krwi i jej skład, jedyną możliwość dostrzega bowiem w transfuzji. Najmniejszy błąd w wyliczeniach może kosztować pacjenta życie, naczynia krwionośne mogą pęknąć, co wywoła atak apopleksji. Niemniej mędrzec podkreśla magiczny aspekt metamorfozy. Jego zdaniem kuracja nie pozostanie bez wpływu na stan pacjenta; „chcąc zyskać, trzeba stracić”, stwierdza stanowczo, co odnosi się do nieuchronnie przyspieszonego procesu starzenia. Jeśli eksperyment się powiedzie i Bessaz odzyska ludzką postać, zestarzeje się o dziesięć lat, jeśli zakończy się fiaskiem i na powrót zyska postać żółwia – o dwadzieścia. Tarazi ma wyraźne wątpliwości natury etycznej: „czy mamy do tego moralne prawo? To nieme stworzenie, nie może powiedzieć ani «tak» ani «nie»”. Ostatecznie decyduje się działać w zgodzie z własnym sumieniem wierząc, że Bessaz życzyłby sobie, aby zaryzykować i przeprowadzić kurację.

Warto również zwrócić uwagę na stosunek Bessaza do własnego zmieniającego się ciała, gdyż bynajmniej nie jest on jednoznacznie negatywny. O ile bowiem nie

⁵⁹ Tamże, s. 214.

budzi wątpliwości niechęć do pojawiającego się pancerza i zmieniającej fakturę skóry, o tyle w osobliwy sposób traktuje Bessaz ogon – pierwszy widoczny znak przemiany. Już w dzieciństwie miał narodzić się rodzaj wystającej kości ogonowej, wskutek czego ojciec nazywał syna „ogoniastym chłopczykiem”. Z jednej strony według słów wypowiedzianych przez samego Bessaza, w pierwszym momencie po przemianie ogon jest lepki, ohydny i oślizgły, z drugiej, gdy mija pierwszy szok, zaczyna postrzegać go jak dziecko („To było moje dziecko, może i dziwaczne, ale wyrosło z mojej istoty, z mojego ciała”)⁶⁰, spogląda nań z mieszaniną litości i zachwytu, nadmiernie się o niego troszczy, przekraczając nawet granice absurdu, pragnąc go czesać (ogon to jak na żółwia nietypowy, pokryty okrywą włosową) i perfumować indyjską wodą różaną. Kiedy po półrocznej kuracji stwierdzono, że mięśnie ogona zmiękły na tyle, że bez problemu można by go przywiązać do pleców, Bessaz uparcie powtarza, że nie jest to konieczne, gdyż ogon mu nie przeszkadza. Zresztą to najbardziej symboliczną częścią ciała; był nie tylko pierwszym, jak wspomniano, zwiastunem przemiany w zwierzę, lecz także najpóźniej ze wszystkich żółwich atrybutów się Bessaz go pozbył, kiedy kuracja zaordynowana przez Taraziego początkowo odniosła sukces. To również ślad po ogonie, widoczny na kości guzicznej Bessaza-człowieka tak bardzo zaniepokoił Taraziego, który dostrzegł w nim rychłą zapowiedź klęski: („w miejscu, gdzie rósł dotychczas, widniała niewielka narośl wielkości orzecha, ognistoczerwona, jeszcze nie całkiem pokryta skórą (...)”)⁶¹. Traktowany przez Bessaza ze szczególną uwagą ogon, mimo że odpadł i wyrzucono go na śmietnika, przetrwał w postaci zgrubienia, zwiastując mające wkrótce nadejść kłopoty.

Powieść *Żółw Taraziego* intryguje ze względu na wykorzystanie rozbudowanego chelonologicznego motywu przemiany, a także oryginalność koncepcji twórczej, co znalazło odzwierciedlenie w układzie formalnym powieści. Podział książki na trzy części, z której każda taktuje o perypetiach Bessaza mającego inną postać, początkowe rozmowy uczonych w obecności milczącego zwierzęcia, następnie wspomnienia pół żółwia i pół człowieka i historia opowiedziana z jego perspektywy, relacja owego „starszego pana ze szpakowatymi wąsami” prowokuje do zastanowienia się nad ingerowaniem w sprawy wymykające się naszemu pojmowaniu.

Chociaż *Żółw Taraziego*, *Wielki Pan i żółw* oraz *Pidgin i Theresa* wywodzą się z różnych kręgów kulturowych, wszyscy trzej twórcy sięgnęli po figurę żółwia, aby posłużyć się motywem przemiany w zwierzę. Na szczególną uwagę zasługuje w tym kontekście powieść Pułatowa; o ile bowiem zaryzykować można stwierdzenie, że metamorfoza w gada (na wzór innych zwierząt) nie była koncepcją aż tak oryginalną, o tyle u tadżycko-uzbeckiego autora trzykrotna przemiana – i to w obie strony – świadczy o śmiałym rozwinięciu dotychczas stosowanej koncepcji twórczej.

⁶⁰ Tamże, s. 150.

⁶¹ Tamże, s. 161.

Podróż

Trzecim motywem, wykorzystanym odpowiednio przez Russella Hobana i Stanisława Michała Grabowskiego jest podróż, choć w odniesieniu do samych żółwi bardziej zasadne byłoby stwierdzenie: zmiana miejsca pobytu⁶². Pojęcie podróży bardziej odpowiednie wydaje się bowiem w odniesieniu do ludzi, głównych bohaterów *Żółwego dziennika* i *Żółwi w aerobusie*; to w nich dokonuje się wewnętrzna przemiana lub wyprawa staje się koniecznością ze względu na podjęte wyzwanie finansowe. Niemniej żółwie stanowią nieodłączny element świata przedstawionego; w przypadku noweli Grabowskiego wybór tych akurat zwierząt był konieczny ze względu na treść utworu (zakład) i kontekst kulturowy (motyw świętych żółwi), u Hobana natomiast ewentualna decyzja, aby zastąpić je innym wodnym i odpowiednio dużym gatunkiem zwierząt byłaby niemożliwa, biorąc pod uwagę przekaz i interpretację powieści. Opisana w książce ospałość żółwi koresponduje tu ze spokojną, momentami wręcz senną fabułą książki.

Żółwi dziennik (1975) to pozycja szerzej znana z ekranizacji pod tym samym tytułem zrealizowanej według scenariusza Harolda Pintera i w reżyserii Johna Irvina z 1985 roku, w której główne role zagrali Glenda Jackson i Ben Kingsley. To opowieść o dwojgu samotnych, nieszczęśliwych ludziach, których dramat polega na niemożności uświadomienia sobie, jak bardzo ich ta samotność przytłoczyła. Pozornie żyją jak inni; mają pracę, mieszkanie, kobieta ponadto osiągnęła pewną pozycję społeczną – jest znaną pisarką i ilustratorką książek dla dzieci. Wszystko zmienia się, kiedy niezależnie od siebie ulegają fascynacji oglądanymi w ogrodzie zoologicznym morskimi żółwiami zielonymi (*Chelonia mydas*), a następnie, działając już razem, postanawiają wywieźć gady do Polperro i wypuścić je do oceanu. Wyprawa kończy się sukcesem i żółwie wracają na wolność, jednak najważniejsza przemiana dokonuje się w życiu kobiety i mężczyzny. Neaera, dotąd jak żółw zamknięta w skorupie czterech ścian mieszkania, szczęśliwie zakochuje się, William, który w oczach trzymany w zoo żółwi dostrzegał tęsknotę nieprzeplątytych nigdy tysięcy podmorskich kilometrów, zaczyna częściej widywać się z ludźmi.

Pod pewnymi względami doszukać się można podobieństwa między książką Hobana a niezapomnianym *Uwolnić orkę* w reżyserii Simona Wincera z 1994 roku. Przetransportowanie gigantycznego zwierzęcia, tam ponad trzymetrowego walenia, tutaj trzech żółwi morskich nieprzystosowanych do tego środkiem lokomocji (przywiązana na przyczepie samochodu orka, żółwie w skrzynkach w fordzie transicie) i nade wszystko pragnienie zwrócenia zwierzętom wolności stanowią cechy wspólne, jednak w *Żółwym dzienniku* plan uratowania gadów przebiega całkowicie bez zakłóceń; opiekun żółwi nie odmawia pomocy, nie dochodzi do

⁶² Gdyby nie ramy ograniczające temat do obszaru literatury europejskiej należałoby poddać analizie także *Wielkiego żółwia* Horacia Quirogi. Nowela traktuje bowiem o przebywającym w dżungli lekarzu, który uratował poranionego żółwia, a kiedy zapadł na ciężką chorobę, gad przeniósł go na własnym pancerzu do miasta.

pościgu, William i Neaera nie napotykają żadnych trudności na drodze do realizacji zamierzeń. Podczas lektury napięcie nie rośnie, co koresponduje z układem formalnym powieści. To faktycznie dziennik, notatki spisywane naprzemiennie przez kobietę i mężczyznę, obrazujące ich odczucia, niemające zaś na celu wzbudzenia w odbiorcy gwałtownych emocji.

Fascynacja gadami chwilami ociera się o antropomorfizację, choć William sam zdaje się sobie uświadamiać absurdalność podobnych sugestii:

Żółw morski nie potrafi zamknąć się w pancerzu jak lądowy. Jego pancerz przypomina ciasną kamizelkę z tkanki kostnej, a płetwy zawsze wystają. Nic nie poradzi, jeśli nadciągnie rekin może najwyżej się modlić. Idiotyczny pomysł, żeby żółw miał się uciekać do modlitwy, kiedy z dołu szarżuje ta zębata paszczyka⁶³.

Hoban momentami nie stroni od ironii, przykładowo wkładając w usta Williama stwierdzenie:

George Fairbairn wywiózł przed bramę żółwie w skrzynkach. Leżały na wznak, z płetwami przyciśniętymi do boków i otwartymi pyskami. Słyszałem, jak wzdychają: wiedziały, że trafiły między głupców⁶⁴.

Żółwi dziennik to także książka zawierająca zgodne z obecnym stanem wiedzy, cenne informacje dotyczące życia morskich gadów.

Motyw przetransportowania żółwi stanowi również oś fabularną dedykowanych lotnikowi, kapitanowi Bogusławowi Orlińskiemu *Żółwi w aerobusie* (1927). Podobnie jak w *Osiemdziesiąt dni dookoła świata* Juliusza Verne'a, w noweli Garbowskiego bohaterowie zakładają się, i to w dodatku o dużą sumę. Podając w wątpliwość informację Ettela Orda, że istnieją żółwie o długości dwóch metrów i wadze pięciuset kilogramów, Mr. Blax stawia na szali milion dolarów. Odpowiedzialnym za realizację, tj. dostarczenie ogromnych gadów z Madagaskaru do Stanów Zjednoczonych czyni Ord Remiego Mallota, który od początku zachęcał go, aby podjął wyzwanie. U wybrzeży wyspy Burbonów (Reunion), dzięki pomocy przyjaciela po raz pierwszy żółwie znalazły się w skrzyniach:

Spod owych brył dziwacznych – w opyle złotym światła – wysunęły się głowy niby ptaków dużych, bez dziobów, zmięte, bezzębne, o oczach ciemnych – małych i błyszczących. Potwornie wielkie, ociężałe żółwie wyciągnęły szyje nad skrzynie, nad liny – i spojrzeniem, pozbawionym jakiegokolwiek wyrazu, przyglądały się istotom ludzkim, schylonym nad nimi⁶⁵.

Gotowe do dalszej podróży żółwie uczestniczą w niezrozumiałym dla siebie rytuale przygotowań i spokojnie podporządkowują się ludzkim działaniom.

⁶³ R. Hoban, *Żółwi dziennik*, przeł. M. Kłobukowski, Warszawa 2021, s. 13.

⁶⁴ Tamże, s. 136.

⁶⁵ S.M. Grabowski, *Żółwie w aerobusie. Nowela madagaskarska*, Poznań 1927, s. 35.

Nad gadami czuwają jednak siły, których Mallot nie bierze pod uwagę. Są to bowiem „wielkie, święte żółwie, bogowie świata kafrów”, czczone przez autochtonów, gotowych oddać za nie życie. Ostatecznie żółwi nie udaje się dostarczyć do Stanów Zjednoczonych. Metafizyka zderza się z twardą rzeczywistością; samolot, na pokładzie którego znajdują się skrzynie wraz ze zwierzętami ulega katastrofie, a same gady, zabezpieczone spadochronami, trafiają w głębiny wód:

Porwane siłą z fal, wywiezione przemocą – święte żółwie z wybrzeża St. Benoit, zbuntowały się widać: powolne, olbrzymie żółwie – od tysiąca przeszło drepące na jednym wybrzeżu, szlakiem XX wieku – uszły do zatoki św. Augustyna, gdzie rozpoczną nową dla siebie epokę życia...⁶⁶.

Przekonany, że wszystko przegrał i naraził Ettela na gigantyczne straty, Mallot nie może sobie tego darować, jednak w ostatniej chwili dowiaduje się, że portugalska łódź podwodna odnalazła dokumenty, na mocy których dowiedziono istnienia olbrzymich żółwi.

W *Żółwym dzienniku* i *Żółwiach w aerobusie* motyw przetransportowania gadów stanowi pretekst do ukazania działań głównych bohaterów lub przemian zachodzących w ich psychice. Żółwie są bierne, co szczególnie ilustruje powieść Russella Hobana, zresztą nie wykazują aktywności równie w noweli Grabowskiego; dopiero ingerencja sił wyższych sprawi, że wody oceanu upomną się o swoją własność. Niemniej jednak to wokół żółwi zbudowana jest fabuła utworów. To ich istnienie stanowi przedmiot zakładu i to ich uwolnienie jednoczy w wysiłkach osamotnionych ludzi.

Zakończenie

Żółw, począwszy od starożytności, jest obecny w literaturze. Kontekst historyczny, upostaciowiony w malowanych na murach zniszczonej wojną Warszawy sylwetkach *Testudo hermanni* odnalazł odzwierciedlenie pod piórem Konstantego Steckiego (*Spod znaku żółwia*), natomiast *Kinderszenen* Jarosława Marka Rymkiewicza i *Moje żółwie* Iwony Siwkowskiej stanowią zapis wojennych przeżyć sporządzony z perspektywy cywilów, a zarazem opiekunów wspomnianych gadów. U Eugeniusza Paukszty (*Znak żółwia*) echa wojny pobrzmiewają w przygodach badającej kulisy akcji „Żółw” młodzieży. Przemianę – drugi z chelonologicznych motywów omówionych w artykule – przeanalizowałam w oparciu o lekturę *Wielkiego Pana i żółwia* Małgorzaty Modrak, *Pidgina i Theresy* Clive’a Barkera i *Żółwia Taraziego* Timura Pułatowa, przechodząc od relacji bezpośredniej, czyli przemiany człowieka w zwierzę lub zwierzęcia w człowieka, do narzucającej większe wymagania interpretacyjne metamorfozy człowieka w żółwia, na powrót w człowieka i znów w żółwia. Ostatni z omówionych motywów to podróż;

⁶⁶ Tamże, s. 89-90.

impulsem do jej podjęcia jest chęć uwolnienia gadów z ogrodu zoologicznego (*Żółwi dziennik* Russella Hobana) lub zakład i pragnienie udowodnienia istnienia ogromnych żółwi morskich (*Żółwie w aerobusie* Stanisława Michała Grabowskiego). Żółwie należą do najdłużej żyjących zwierząt. Wygląda na to, że wciąż wydłużać się będzie także lista lektur, w których zaznaczać będą swoją obecność.

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ROCKING THE ENGLISH MODALS: INVESTIGATING LINGUISTIC MODALITY IN INDUSTRIAL ROCK LYRICS

Abstract: When a speaker creates an utterance, they pick between several linguistic devices to convey their attitudes, although, according to Collins, the modal auxiliaries are the primary way of expressing modality in English¹. Numerous scholars have investigated modality in poetry, short stories, or novels², yet relatively few have inspected modality within song lyrics. This study explores the use of modal verbs and modality types in industrial rock lyrics through a corpus-based analysis, employing Palmer's³ classification of modality into epistemic, deontic, and dynamic types. Lyrics from popular albums by *Ministry*, *Marilyn Manson*, *Skinny Puppy*, and *KMFDM*, as well as a detailed case study of *Nine Inch Nails*, were analysed. The findings highlight the dominance of *can* and *will* and the underrepresentation of epistemic modality across the corpus. Dynamic modality emerged as the most frequent type, followed by deontic modality. Additionally, the analysis challenges Palmer's findings, which claim that deontic modals usually do not appear paired with pronouns *I* or *we* serving as a subject⁴. The study contributes to linguistic research on modality in underexplored genres, offering insights into linguistic modality in musical lyricism.

Keywords: song lyrics, corpus analysis, English modals, epistemic modality, dynamic modality, deontic modality.

¹ Collins, P., 2023, *Modals and Quasi-Modals in English World-Wide*, „Journal of English Linguistics”, 265.

² de Hoop, H., Lestrade, S., 2015, *Modality in Lolita*, w: Lardinois, A. et al. (red.), *Texts, Transmissions, Receptions*, Leiden, 97-113; Paríña, J. C., de Leon, K., 2014, *A Stylistic Analysis of the Use of Modality to Identify the Point of View in a Short Story*, „3L: The Southeast Asian Journal of English Language Studies”, 91-100; Zupan, S., 2016, *Epistemic Modality in Translation: Poe's "The Fall of the House of Usher"*, „AAA: Arbeiten aus Anglistik und Amerikanistik”, 5-24.

³ Palmer, F.R., 1990, *Modality and the English Modals*, Oxford.

⁴ Palmer, dz. cyt., 74.

Streszczenie: Kiedy nadawca tworzy wypowiedź, wybiera spośród szeregu środków językowych pozwalających wyrazić postawy i intencje, choć, jak zauważa Collins, to właśnie czasowniki modalne stanowią podstawowy sposób wyrażania modalności w języku angielskim¹. Modalność była przedmiotem licznych badań w kontekście poezji, opowiadań czy powieści², jednak stosunkowo niewiele analiz dotyczyło tekstów piosenek. Niniejsze badanie przedstawia analizę użycia czasowników modalnych oraz typów modalności w tekstach utworów gatunku *industrial rock*, wykorzystując metodę analizy korpusu i opierając się na podziale modalności zaproponowanym przez Palmera³, który obejmuje modalność epistemiczną, deontyczną i dynamiczną. Analizie poddano teksty z popularnych albumów zespołów *Ministry*, *Marilyn Manson*, *Skinny Puppy* i *KMFDM*, a także przeprowadzono pogłębione studium przypadku na podstawie twórczości *Nine Inch Nails*. Wyniki wskazują na dominację czasowników *can* i *will* oraz znacząco niską frekwencję modalności epistemicznej w badanym materiale. Najczęściej występującym typem modalności okazała się modalność dynamiczna, a w dalszej kolejności modalność deontyczna. Ponadto analiza wskazuje na odstępstwo od ustaleń Palmera, dotyczące rzadkiego współwystępowania modalności deontycznej z zaimkami *I* lub *we* jako podmiotem⁴. Badanie stanowi wkład w rozwój badań nad modalnością w dotychczas słabo eksplorowanych gatunkach, dostarczając nowych spostrzeżeń na temat modalności językowej w tekstach muzycznych.

Słowa kluczowe: teksty piosenek, analiza korpusu, czasowniki modalne w języku angielskim, modalność epistemiczna, modalność dynamiczna, modalność deontyczna.

Introduction

Modality is a semantic category⁵ that encompasses the various ways in which speakers convey their attitudes through linguistic devices such as verbs, adverbs, and nouns⁶. Notwithstanding, a large number of studies focus solely on modal auxiliaries, which are deemed to be the primary way of expressing modality in English⁷. The scope of modality includes various states, from epistemic possibility ("This may be the postman") to deontic possibility or permission ("You may come in"). Other traditional meanings of modals include ability, volition, obligation, probability and prediction⁸, but it is important to note that states such as hope, politeness or doubt may also be conveyed through modals. For instance, "This cannot be!" shows the speaker's disbelief, but could also serve as dissuasion depending on the context. As illustrated, modality not only plays a key role in the

⁵ Saeed, J.I., 1997, *Semantics*, Oxford.

⁶ von Stechow, K., 2005, *Modality and Language*, 1.

⁷ Collins, dz. cyt., 265.

⁸ Brewer, N.M., 1987, *Modality and factivity: One perspective on the meaning of the English modal auxiliaries*, Leeds, 31.

verbalisation of intention and emotion, but it is also context-dependent, which is perhaps why it remains a prominent topic of discussion in linguistics.

While the study of modality has gained attraction in the context of poetry, prose and other literary genres⁹, its application to song lyrics remains an underexplored area of inquiry. Song lyrics, as a hybrid form of artistic and linguistic expression, offer unique insights into how modality operates in creative contexts. Unlike traditional literary genres, lyrics are designed to be performed and heard, which adds a dynamic, auditory dimension to the analysis of modality. They often combine concise language with emotional intensity, making them a rich source for exploring how linguistic devices convey nuanced states such as possibility, obligation, and doubt.

Industrial music, in particular, stands out as a genre worth examining due to its distinctive thematic preoccupations and stylistic features. Known for its “modernist, revolutionary spirit”¹⁰, the genre frequently engages with themes of power, control, and existential questioning, all of which align closely with the functions of modality.

Due to industrial music’s broad scope, its blends with other genres are not uncommon; for instance, Reed¹¹ mentions existing connections between industrial, punk rock, and techno. In this context, industrial rock can be understood as a fusion of industrial music with rock aesthetics. While Reed does not explicitly define industrial rock as a distinct category, he refers to a “sneering, guitar-driven” version or “rock-based industrial”, associating this style with bands such as *Ministry* and *Nine Inch Nails*¹², both of which are included in the present study.

This study employs a corpus-based linguistic analysis method to determine the most commonly used modal verbs in industrial rock lyrics and identify the predominant modality types within the analysed lyrics. The corpus consists of lyrics from the four most popular albums by bands classified as industrial rock: *Ministry*, *Marilyn Manson*, *Skinny Puppy*, and *KMFDM*. Additionally, a more detailed case study of six studio albums by *Nine Inch Nails* will be presented. Based on Nguyen’s and Daus’s findings¹³, it is hypothesized that *can*, *will*, *would*, and *could* are the most frequently used modal verbs in the corpus. Given the diverse range of themes explored in industrial music, all three types of modality – epistemic, deontic, and dynamic – are expected to appear in the lyrics. However, due to the genre’s emotionally intense and directive nature, it is anticipated that deontic modality may dominate the corpus.

⁹ de Hoop, dz. cyt.; Pariña i de Leon, dz. cyt.; Zupan, dz. cyt.

¹⁰ Reed S.A., 2013, *Assimilate: A Critical History of Industrial Music*, Oxford, 64.

¹¹ *Ibid.*, 34.

¹² *Ibid.*, 318-319.

¹³ Nguyen N.T.D., 2019, *Modal verbs in English: Observations of recent change in corpora*, 36; Daus R., 2017, *On the development of modals and semi-modals in American English in the 19th and 20th centuries*, „Studies in Variation, Contacts and Change in English”, 19.

Classification of modality

As in the case of definition of modality, there is significant dispute in the academic field considering its classification. The most basic distinction divides modality into epistemic and root modality¹⁴, but several other classifications can be found in the literature. For instance, Von Wright¹⁵ classifies 4 types which he calls *modes*, whereas Narrog¹⁶ writes about as many as 8 types of modality. Palmer, the “pioneering scholar of modality”¹⁷, divides root modality into deontic and dynamic modality. This procedure draws a line between performative and non-performative uses of modals that do not conform to epistemic modality, without allocating excessive attention to semantic variability. This paper shall use Palmer’s¹⁸ classification due to his widely recognised contribution to the field of linguistic modality and sufficiently, but not excessively detailed distinction.

Epistemic modality

Palmer remarks that epistemic modality is “the simplest type,” bringing attention to its explicitly different features and considerable extent of “regularity and completeness”¹⁹. Epistemic modality concerns one’s judgement of reality; that is, it “refers to someone’s world knowledge, typically that of a speaker”²⁰. In other words, epistemic modality reflects how confident the speaker is about the truth of a statement based on available reasoning, evidence or knowledge. Consider the following:

- (1) Lucy may be in her office. [Author’s own example]

In this example, the use of *may* signals a degree of uncertainty about Lucy’s whereabouts. The speaker does not assert that Lucy is definitively in her office but rather presents it as a possibility within their knowledge framework. This example conforms to Palmer’s idea of epistemic possibility. It should be noted that according to Palmer the tentative form of *may*, *might*, is also tied to epistemic possibility²¹. On the other hand, *must* is associated with epistemic necessity and it conveys a significantly higher level of confidence²².

¹⁴ Papafragou A., 1997, *Modality in language development: A reconsideration of the evidence*, „UCL Working Papers in Linguistics”, 9, 1-2.

¹⁵ Von Wright, cyt. za: Zhang J., 2019, A semantic approach to the English modality, „Journal of Language Teaching and Research”, 10(4), 880.

¹⁶ Narrog H., 2012, *Modality, Subjectivity, and Semantic Change*, Oxford, 8-11.

¹⁷ Palmer F.R., dz. cyt.; Morin C., 2020, *Lives in Language: Frank Robert Palmer (1922-2019)*, „Babel”, 30, 28-29.

¹⁸ Ibid.

¹⁹ Palmer F.R., dz. cyt., 50.

²⁰ Narrog H., dz. cyt., 8.

²¹ Palmer F.R., dz. cyt., 58.

²² Ibid., 53-56.

Other verbs associated with epistemic modality include *be bound to*, *have (got) to*, *would* and *should*²³.

Deontic modality

Perhaps the most crucial quality of deontic modality is the fact that it is 'performative' or at least concerned with 'performative uses'²⁴, which means that it does not only create expressions that reveal the position of the speaker towards the existing world, but it is also intertwined with the act of performing an action; that is, it may also change the existing world. For instance, a deontic utterance may be produced by laying an obligation. Such an obligation generates a responsibility for the addressee, who might later act on it, consequently altering the reality. Laying an obligation is in itself an action, rather than a mere descriptive statement, which hints at deontic qualities of obligations.

Although some scholars associate deontic modality with external responsibilities²⁵, it does not have to refer to actual legal or social duties; rather, it may concern responsibilities implied or imposed by the speaker within the text. In this understanding, stating that "*one cannot smoke in the library*" may be classified as dynamic if uttered by someone merely quoting the rules, without an explicit intention to influence the listener's behaviour- for instance, when said jokingly to a friend who breaks the rule. Thus, this paper adopts the view that deontic modality entails a high, often emotional, involvement of the speaker, as well as a strong desire to influence the addressee, unlike epistemic or dynamic modality.

It is also worth noticing that despite being called "the modality of permission and obligation" by Klinge²⁶, deontic modality is not limited to permissions and obligations. Palmer additionally enumerates promises and threats as possible deontic outcomes²⁷, however, this list could be expanded to encompass suggestions, warnings, wishes, persuasion, insistence, challenges, etc. Various subcategories of this kind differ in slight nuances, which indicates the vast range of possible meanings embraced in the term 'deontic modality.'

In terms of the existing categorisation of deontic modality, Palmer operates within terms deontic 'possibility' and 'necessity' to designate *may* and *can* as agents of the former, and, less obviously, *must* as the verb involved in the latter²⁸. The degree of formality is what distinguishes the usage of *can* in permissions from that of *may*: namely, *may* is mostly found in formal contexts²⁹. Suikkanen identifies

²³ Ibid., 50-59.

²⁴ Ibid.

²⁵ Zhang J., dz. cyt.

²⁶ Klinge A., 1993, *The English Modal Auxiliaries: From lexical semantics to utterance interpretation*, „Journal of Linguistics”, 29(2), 318.

²⁷ Palmer F.R., dz. cyt., 69.

²⁸ Ibid., 69.

²⁹ Ibid., 71.

must, should, ought, may, and can as deontic modals³⁰, which largely correspond to those discussed by Palmer³¹, with the exception of *shall* and *had better*, which are additionally included by the latter.

Dynamic modality

Although dynamic modality raises some controversy in the field³², it is recognised by many scholars³³. The most natural and obvious logical conclusion is the one that dynamic modality is concerned with these utterances that conform neither to epistemic nor deontic modality. Klinge explains that dynamic modality is “the modality of ability and disposition”³⁴. This is confirmed by Palmer, who additionally describes it as “concerned with the ability and volition of the subject of the sentence.”³⁵ According to Nuyts³⁶ dynamic modality has three subtypes: participant-inherent, participant-imposed and situational dynamic modality. The first two pertain to internal and external circumstances involving the subject, whereas the third one specifies probable or inevitable circumstances in the given circumstances³⁷. Nuyts’ situational dynamic modality corresponds to Palmer’s neutral or circumstantial dynamic modality³⁸. Regardless of the type, it is important to notice that in general, dynamic modality deals with neutral statements that are not performative in nature, e.g. descriptions of the world or ability of the subject.

Palmer allots two separate chapters to dynamic possibility and necessity. In the chapter on the former, he takes a closer look at *can* and *be able to*. On the other hand, dynamic necessity, the latter, is connected with *must* and *have (got) to*. However, in *Modality and the English Modals*, the matter of dynamic modality spans into another chapter dedicated to *will, shall*, and futurity³⁹.

Methodology

To investigate the use of modal verbs in industrial rock lyrics, a corpus-based approach was employed. Four bands recognized as industrial rock were selected: *Ministry*, *Marilyn Manson*, *Skinny Puppy*, and *KMFDM*. This classification

³⁰ Suikkanen J., 2018, *Deontic Modality*, „Analysis”, 78(2), 354.

³¹ Palmer F.R., dz. cyt.

³² Kim Y., 2017, *Modal Categories and Dynamic Modality in English*, „Korean Journal of English Language and Linguistics”, 17(4), 701-727;

³³ Nuyts J., 2014, *Analyses of the Modal Meanings*, w: Nuyts J., van der Auwera J. (red.), *The Oxford Handbook of Modality and Mood*, Oxford, s. 31-49; Klinge A., dz. cyt.; Martirosyan A., 2022, *Types of modality and its inconsistencies*, „Bulletin of Eurasia International University”, 99-112.

³⁴ Klinge A., dz. cyt., 318

³⁵ Palmer F.R., dz. cyt., 7.

³⁶ Nuyts J., dz. cyt., 31-49.

³⁷ Ibid.

³⁸ Palmer F.R., dz. cyt., 36-37.

³⁹ Ibid.

is supported both by their labelling on major streaming platforms (e.g., Spotify) and by references in Reed⁴⁰. For each band, four studio albums were chosen based on a combination of commercial success, certification status, and thematic relevance. For instance, several of the selected albums received formal certifications: *Antichrist Superstar* (Marilyn Manson) and *Psalm 69* (Ministry) were certified Platinum in the United States, and *Bites* (Skinny Puppy) was certified Gold in Canada⁴¹. The final corpus consisted of the following albums:

- *KMFDM: Nihil, Xtort, Symbols, Kunst.*
- *Marilyn Manson: Antichrist Superstar, Mechanical Animals, Holy Wood (In the Shadow of the Valley of Death), The Golden Age of Grotesque.*
- *Ministry: The Mind Is a Terrible Thing to Taste, Psalm 69: The Way to Succeed and the Way to Suck Eggs, Filth Pig, The Land of Rape and Honey.*
- *Skinny Puppy: Remission, Bites, Too Dark Park, Cleanse Fold and Manipulate.*

Where certification data was unavailable, albums were selected based on their visibility in artist discographies, continued presence in streaming platforms, and thematic relevance to the study, as discussed in scholarly analyses⁴².

The lyrics of all songs from these and *Nine Inch Nails'* albums were collected from *Genius Lyrics*⁴³ and compiled into Word documents. The documents were then converted into PDFs, enabling the use of the search function to locate instances of nine central modal verbs (*can, could, may, might, shall, should, will, would, and must*). Each instance of the modal verbs was counted for each album. All variations of the modal verbs, including their negative, contracted, and alternative forms, were included in the count. To maintain accuracy, repeating lines within songs were excluded to avoid duplicates.

For the case study of *Nine Inch Nails*, the first six studio albums were analysed (*Pretty Hate Machine, The Downward Spiral, The Fragile, With Teeth, Year Zero, Ghosts I-IV*). Following the same procedure, instances of modal verbs were identified and quantified. Subsequently, *can* and *will* were selected for detailed analysis. Each occurrence of these verbs was examined in context to determine its modal type (deontic, dynamic, or epistemic). Contextual clues from the lyrics were taken into account to ensure accurate classification.

⁴⁰ Reed S.A., dz. cyt.

⁴¹ Recording Industry Association of America, n.d., *Gold & Platinum Searchable Database*, Accessed: 8 April 2024; Music Canada, n.d., *Gold/Platinum Certification Archives*, Accessed: 8 April 2024.

⁴² Reed S.A., dz. cyt.

⁴³ KMFDM, n.d., *Genius Lyrics*, Accessed: 15 January 2024; Marilyn Manson, n.d., *Genius Lyrics*, Accessed: 15 January 2024; Ministry, n.d., *Genius Lyrics*, Accessed: 15 January 2024; Nine Inch Nails, n.d., *Genius Lyrics*, Accessed: 15 January 2024; Skinny Puppy, n.d., *Genius Lyrics*, Accessed: 15 January 2024.

Results

The analysis of modal verbs across the lyrics of *Ministry*, *Marilyn Manson*, *Skinny Puppy*, and *KMFDM* reveals notable patterns in their usage. Among the nine central modal verbs investigated, *will* and *can* emerge as the most frequently used, collectively accounting for a significant majority of the modal verb occurrences (see Figure 1 below).

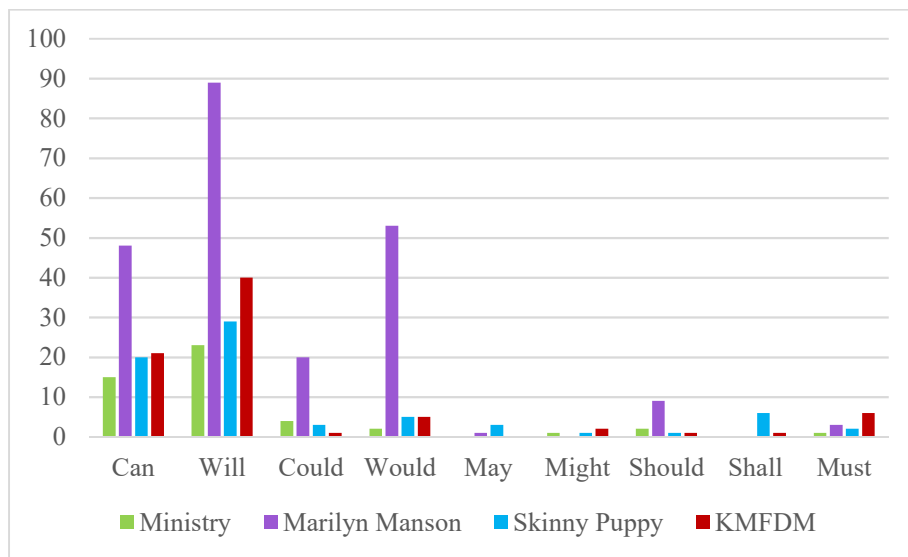


Figure 1. Frequency of modal verbs in industrial rock lyrics
[source: Author's own analysis]

Will is the most prevalent modal verb, with a total of 181 occurrences, constituting around 43% of all modal verb instances; *can* follows as the second most frequent modal, appearing 104 times and representing 24.9% of the total. The next most frequent modal verb, *would*, appears 65 times, making up 15.6% of the total. This figure represents a notable drop compared to *will* and *can*. It is important to note, however, that most of the *would* occurrences come from one band. The remaining modal verbs (*could*, *should*, *must*, *shall*, *may*, and *might*) collectively account for less than 17% of the total, with individual percentages ranging from 6.7% (*could*) to less than 1% (*may* and *might*).

Nine Inch Nails: a case study

In the analysis of *Nine Inch Nails*' studio albums, the results resemble the trends visible in other bands. *Can* emerges as the most frequent modal verb, with 121 occurrences, accounting for approximately 39% of all modal verbs in the corpus. *Will* follows as the second most frequent modal, appearing 89 times, constituting nearly 29% of the total. Together, *can* and *will* dominate the dataset, collectively

representing over 68% of all modal verb instances. The next most frequent modal verbs, *could* (11.7%) and *would* (11.3%), show a significant drop in frequency compared to *can* and *will*. The remaining modal verbs (*should*, *might*, *must*, *may*, and *shall*) collectively account for less than 9% of the total, with *shall* notably absent. Figure 2 below summarises the frequency distribution of modal verbs in the selected *Nine Inch Nails* albums.

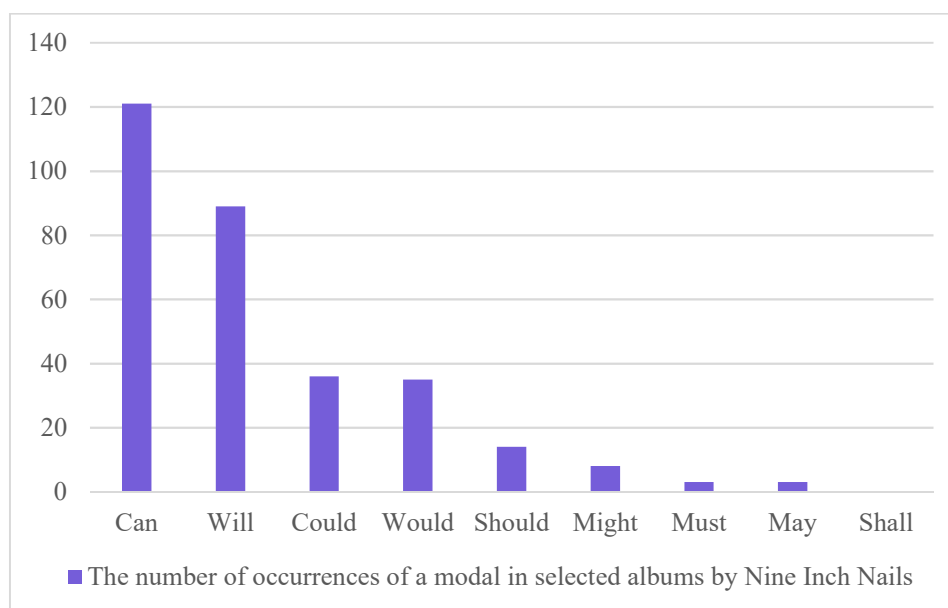


Figure 2. The distribution of modal verbs in selected albums by *Nine Inch Nails*
[source: Author's own analysis]

Given their overwhelming prevalence, a detailed analysis was conducted on the two dominant modal verbs, *can* and *will*, focusing on their respective modality types. Figure 3 presents the distribution of modality types assigned to each occurrence of *can* and *will*, based on contextual interpretation of the lyrics.

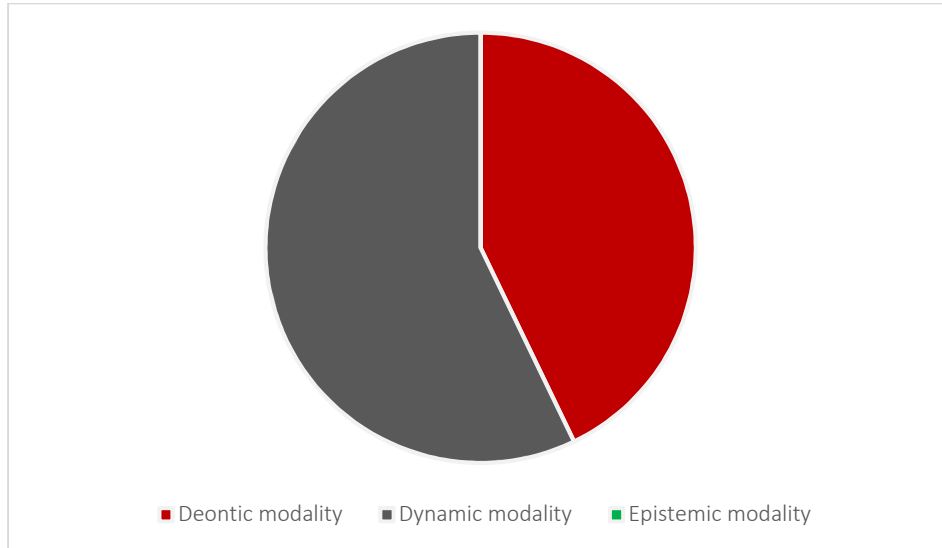


Figure 3. The distribution of modality types in selected albums by *Nine Inch Nails*
[source: Author's own analysis]

Noticeably, out of 210 occurrences total, not a single line corresponds to epistemic modality.

Of *can*'s 121 occurrences, 37 instances (around 31%) were classified as deontic, whereas the majority, 84 occurrences (69.4%), were classified as dynamic. Consider (1), an example of deontic *can* originating from *Big Man With a Gun* from *The Downward Spiral*:

- (1) *I can reduce you if I want,*
I can devour [*Big Man With a Gun*, 9-10]

As Trent Reznor, the principal songwriter reveals, the premise of the song is insanity as well as mockery of the “misogynistic gangsta-rap” (*Big Man With a Gun*, no date). Here, the lyrical subject aims to obtain compliance from the addressee. Making a threat can be considered a performative act, which is why it was labelled deontic. It is crucial to notice that *can* appears here as a deontic agent paired with the *I* pronoun. On the contrary, notice dynamic *can* in (2):

- (2) *Don't try to tell me that some power can corrupt a person*
You haven't had enough to know what it's like [*Capital G*, 17-18]

Here, the lyrical subject comments on the notion that allegedly power may have the ability to corrupt. This is a relatively clear example, because denoting ability is the primary function of dynamic modality.

Among the 89 occurrences of *will*, 53 instances (59.6%) were deontic. Consider (3):

(3) *I won't let you fall apart* [*The Fragile*, 7]

Here, *won't* serves to deliver a promise, which is a performative act that belongs to deontic modality. The subject making a promise is hidden behind the I pronoun. The remaining 36 instances of *will* (40.4%) are dynamic. For instance, see (4):

(4) *The clouds will part* [*The Wretched*, 23]

Here, the speaker predicts an image on the sky using the modal verb *will*. Futurity is generally connected with dynamic modality⁴⁴, hence the classification.

Discussion

The findings of this study reveal notable trends in the use of modal verbs and modality types in industrial rock lyrics. Contrary to the initial hypothesis that *could* and *would* would feature prominently in the corpus, these modal verbs were significantly less frequent than *can* and *will*, which together accounted for over two-thirds of all modal verb occurrences. This suggests that the linguistic expression of ability, determination, and futurity is central to the thematic and stylistic characteristics of industrial rock.

Another significant finding is the underrepresentation of typically epistemic modals such as *might* and *may*. Collectively, these modals comprised less than 2% of the total occurrences, suggesting that epistemic modality – which is often associated with uncertainty and speculation – may not align with the assertive and direct tone of industrial rock lyrics. Furthermore, while *can* and *will* can theoretically function in an epistemic sense, no clear examples of their epistemic usage were found in the corpus. This further supports the conclusion that epistemic modality plays a minimal role in the linguistic makeup of industrial rock.

The detailed case study of *Nine Inch Nails* confirmed the broader trends observed in the corpus. Among the modal verbs analysed, no examples of epistemic modality were identified. Instead, dynamic modality emerged as the most frequent type, accounting for the majority of *can* and *will* instances. Deontic modality followed, with *will* often used to make promises or commitments, and *can* occasionally serving as a performative agent in deontic contexts. These findings contradict the hypothesis that deontic modality would dominate the corpus. Instead, dynamic modality's focus on ability and descriptions prevails.

The minimal presence of epistemic modality in industrial rock lyrics may reflect the genre's thematic focus. Industrial rock often grapples with issues of power, control, and existential struggle – topics that lend themselves more readily to expressions of capability (*can*) and determination (*will*) than to speculation or doubt

⁴⁴ Palmer F.R., dz. cyt.

(*might, may*). Reed notes that the industrial narrative provides “ideological challenges to social and cultural control (...) and our tacit compliance.”⁴⁵ In this context, *can* may be used to establish or question the boundaries of control. Similarly, *will* may assert a speaker’s determination to resist limitations imposed by external systems or internal conflicts. In addition, although industrial music focuses its ethical and political concerns on the present, its early aesthetic choices often imagined or evoked futuristic scenarios⁴⁶. *Will* may serve as a grammatical expression of such visions of the future. Overall, the genre’s emotionally charged and directive nature may prioritise assertiveness and agency over uncertainty, aligning with its rebellious and provocative ethos. This could help explain the scarcity of epistemic modality in *Nine Inch Nails*’ studio albums.

In addition to these genre-specific insights, the study also contributes to broader linguistic theory. The results of the *Nine Inch Nails* case study challenge Palmer’s claim that deontic modals rarely appear with first-person pronouns such as *I* and *we*⁴⁷. The preferred accompanying pronouns for deontic modality in the corpus are *I, me, and you*: consider (1) and (3) again. Albeit Palmer recognises that *I* and *we* pronouns paired with *will* may be reasonably interpreted as deontic⁴⁸, there is no mention of *can* or *me*. Palmer claims that it could be considered strange to give oneself a permission⁴⁹. Nevertheless, in the context of lyrics it seems perfectly reasonable to do so, as lyrics can constitute an act of self-narration: Trent Reznor confirmed that his lyrics bore the qualities of a “journal-entry.”⁵⁰ Since music is often emotionally marked, it is justifiable to believe that the songwriter may strive to address, express and influence oneself through first-person singular pronouns. Several examples from the lyrics demonstrate the use of *can* and *will* in deontic contexts with *I* as the subject, such as in promises or threats. This indicates that industrial rock lyrics might diverge from traditional patterns of modality usage.

These observations also point to broader implications for how modality operates in expressive, non-standard registers such as song lyrics. While most linguistic research focuses on formal or spoken discourse, this study demonstrates that modality in lyrics tends to be expressed differently in emotionally charged musical contexts. According to Daus, who analysed data from the *Corpus of Historical American English (COHA)*, the most commonly used modal verbs in American English from the 1980s to the 2000s were *would, will, can, and could*, in that order⁵¹. However, the frequency patterns observed in this study differ significantly, despite

⁴⁵ Reed S.A., dz. cyt., 12.

⁴⁶ Ibid., 354.

⁴⁷ Palmer F.R., dz. cyt., 74.

⁴⁸ Ibid., 135.

⁴⁹ Ibid., 74-75.

⁵⁰ Reznor T., 1994, Trent Reznor Interview [1994], YouTube, Accessed: 10 April 2024, 10:14-10:17.

⁵¹ Daus R., dz. cyt.

generally aligning with the time period. In fact, *would* and *could* seem to play a relatively minor role. This contrast suggests that the modal needs of lyrical discourse diverge from those of general written language.

It is worth noting that this study supports the continued use of Palmer's⁵² division of modality in corpus-based analyses of creative registers. The distinction between deontic and dynamic modality proves particularly useful in such contexts, as it highlights the difference between performative and non-performative acts- something not fully captured by the binary root versus epistemic distinction favoured by some scholars⁵³.

Conclusion

This study has examined the use of modal verbs in industrial rock lyrics, focusing on their frequency across a corpus of songs by *Ministry*, *Marilyn Manson*, *Skinny Puppy*, and *KMFDM*, as well as a detailed case study of *Nine Inch Nails*. The analysis reveals a clear preference for dynamic and deontic modalities in industrial rock lyrics, with *can* and *will* dominating the modal landscape. In contrast, *could* and *would* were considerably less frequent than anticipated, despite the aforementioned findings by Nguyen and Daug's⁵⁴. The absence of epistemic modality in *Nine Inch Nails*' lyrics and its broader underrepresentation across the corpus suggests that the genre's linguistic style tends to reject uncertainty and speculation in favour of themes related to control and power.

By applying a corpus-based approach to a non-standard, creative register, this study not only offers insights into the stylistic choices of industrial rock but also contributes to linguistic theory. First, it suggests that deontic modals may occur more frequently with first-person pronouns than assumed by Palmer⁵⁵. Secondly, it reinforces the value of distinguishing between deontic and dynamic modality in the analysis of performative discourse. Taken together, these findings offer a more nuanced understanding of how modality functions beyond conventional linguistic domains.

Overall, the results contribute to a growing body of research on linguistic modality by exploring its application in an underexamined genre. These findings invite further exploration into the role of linguistic modality in song lyrics more broadly, beyond industrial rock, and encourage researchers to investigate how modality operates across different musical genres and lyrical styles. Comparative studies could examine whether the underrepresentation of epistemic modality is unique to industrial rock or reflects broader trends across music genres. Future

⁵² Palmer F.R., dz. cyt.

⁵³ Collins J., 2023, *Modals within and beyond the verb phrase: Renewing the debate on epistemicity*, „English Language and Linguistics”, 1-33; Aarts B., Chalker S., Weiner E., 2013, *The Oxford Dictionary of English Grammar*, Oxford.

⁵⁴ Nguyen N.T.D., dz. cyt., 36; Daug's R., dz. cyt.

⁵⁵ Palmer F.R., dz. cyt., 74.

research could also expand the corpus to examine modality in greater detail, especially with regard to how speakers are positioned in lyrics and how this interacts with genre.

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NEOLOGISMS AS A SALIENT FEATURE OF THE VIDEO GAME REGISTER

Abstract: The paper presents neologisms as a salient feature of the video game register and explores them in the context of both video games and the online communication. The paper analyses neologisms from the perspective of Peter Newmark, who distinguishes 12 types of neologisms: old words with new senses, new coinages, derived words, abbreviations, collocations (including noun compounds), phrasal words, acronyms, pseudo-neologisms, eponyms, transferred words, internationalisms and blends. An analysis of language used in video games and related websites revealed examples of nearly all these types, with the exception of transferred words, internationalisms, and blends. However, this does not imply those phenomena are entirely absent. Undeniably, the findings confirm that not only can neologisms be considered a common occurrence in the video game register, but they also display a rich diversity of neologism types present in video games and video-game-related media. Furthermore, the presence of these neologisms serves as evidence for the existence of the video game register.

Keywords: online communication, gaming community, new coinages, word formation, new developments.

Streszczenie: Ten artykuł przedstawia neologizmy jako istotny element rejestru gier wideo oraz bada go w kontekście zarówno gier komputerowych, jak i komunikacji online. Praca analizuje neologizmy z perspektywy Petera Newmarka, który wyróżnia 12 typów neologizmów: stare słowa o nowym znaczeniu, nowe wyrazy, słowa pochodne, skrótowce, kolokacje (w tym rzeczowniki złożone), słowa frazowe, akronimy, pseudo-neologizmy, eponimy, wyrazy przeniesione, internacjonalizmy oraz zbitki wyrazowe. Analiza języka stosowanego w grach wideo i stron z nimi związanymi wykazała przykłady niemal wszystkich typów neologizmów, z wyjątkiem wyrazów przeniesionych, internacjonalizmów i zbitek wyrazowych. Jednakże nie wyklucza to występowania takowych przykładów. Niewątpliwie, ustalenia badania potwierdzają, że neologizmy nie tylko mogą zostać uznane za częste zjawisko w rejestrze gier wideo, ale ukazują również bogatą różnorodność typów neologizmów obecnych w grach wideo i mediach z nimi związanymi. Ponadto, obecność tychże neologizmów jest dowodem na istnienie rejestru gier wideo.

Słowa kluczowe: komunikacja online, społeczność graczy, nowe wyrazy, słowotwórstwo, nowe twory.

Introduction

This paper takes the concepts of online communication, neologisms, and the video game register into consideration, later analysing the cases of neologisms created by virtue of video games and their communities. In addition, a comparative analysis between social media neologisms and video game neologisms is conducted in order to present the distinctive features of the latter.

This research was inspired by the trend of video games' constant gain of popularity and significance in the contemporary world. As McGonigal observes, "Games today come in more forms, platforms, and genres than at any other time in human history."¹ Their variety and accessibility have reached an unprecedented level, and while individuals most often perceive them as a hobby, games undoubtedly represent a rich field for academic exploration.

Since video games are a recent invention, they naturally generate modern language coinages, which are in turn used by individuals associated with gaming. Thus, a new manner of communication is produced.

Online Communication – A Sociolinguistic Perspective

The communication between gamers mostly occurs online, which means that it shares characteristics with the broad concept of online communication. There is a rich variety of sociolinguistic perspectives on Internet language, or, as it is referred to by Crystal – *Netspeak*.² This section's role is to present the characteristic features of this particular type of communication.

The first explicit feature of *Netspeak* is its informality. Johannesson notices that "Netspeak contains linguistic features typically associated with informal English usage, such as non-standard grammar, abbreviations, lack of proper punctuation etc."³ The distance between the Internet users creates a highly informal space. They do not pay attention to their language's correct grammar or punctuation. The language that they use must be, above all, easy to write and understand; the correctness of it does not really matter.

Abbreviations and acronyms in particular play a key role in Internet communication as a means of not only writing easily but also quickly. The perspective of McCulloch provides more information concerning the phenomenon of Internet abbreviations. The authoress makes the following statement:

¹ McGonigal, 2011: 20.

² Crystal, 2006: 19.

³ Johannesson, 2022: 1.

Many internet acronyms make polite hedges accessible even to slower typists, such as “btw” (by the way), “iirc” (if I recall correctly), “imo” (in my opinion), and “afaik” (as far as I know), but writing them as acronyms rather than in full is also in-group vocabulary, saying, in effect, “We’re all internet people here. I trust you to get this.”⁴

Most of the online interactions are done via the keyboard, which means it involves the action of typing letters on it. The Internet users use acronyms as a way of improving the convenience of the communication. The mutual trust presented in the quote is also an interesting occurrence. The users trust that the others will understand what they mean because these abbreviations are so commonly used across their communities.

A conclusion may be drawn that such an environment as the Internet is an ideal space for the development of new coinages. The informal nature of the online communication encourages its users to create neologisms whose case is researched later in this work.

Video Game Register Defined

Having distinguished the characteristics of *Netspeak*, the research group may now be narrowed to the video game players. To understand the means of interacting in video game communities, it is crucial to define the concept of both the *video game register* and the term *register* itself. It is only natural that this term has been described in a variety of ways by different sources.

Wardhaugh defines the registers as “sets of language items associated with discrete occupational or social groups.”⁵ For instance, different language styles are involved if one is speaking to a doctor or a professor than to a friend or a family member. Language aspects such as vocabulary or the level of formality might differ immensely in various groups of individuals.

A similar view is presented by Crystal. The author states that a register is “A socially defined variety of language, such as scientific or legal English.”⁶ Thus, it is the society that distinguishes differing language styles intended for usage across various communicative contexts. For instance, this paper is applying the scientific variety of language.

Therefore, taking both Wardhaugh and Crystal’s perspectives into account, a conclusion may be drawn that a set of vocabulary and language style used by the video game community during play sessions or for the purpose of communication in game-related subjects may be defined as the *video game register*. This concept is explored further in this study.

⁴ McCulloch, 2019.

⁵ Wardhaugh, 2006: 52.

⁶ Crystal, 2018: 521.

Defining Neologisms

The term “*neologism*” is interpreted differently by various sources. For instance, Cambridge Dictionary defines it as “a new word or expression, or a new meaning for an existing word”.⁷ This means a neologism does not necessarily need to be a new lexical unit because an existing word might gain a new sense. A *phone* is an example of such an occurrence because it was used to refer to an analogue phone. Now, owing to the invention of smartphones, the word gained a new meaning – a *smartphone*. As a matter of fact, Minkova & Stockwell believe that “New words are coined every day [...]”.⁸ Therefore, new coinages are not only a common occurrence, but also, their incessant creation may signify that there could well be numerous neologisms unrecognised by dictionaries; such might often occur in the case of the video game register.

On the other hand, Newmark states that “Neologisms can be defined as newly coined lexical units or existing lexical units that acquire a new sense.”⁹ This perspective is quite similar to that of the Cambridge Dictionary because of the same division between the creation of new words and the development of new meanings for the already present lexemes.

Furthermore, Newmark distinguishes 12 types of neologisms: *old words with new senses*, *new coinages*, *derived words*, *abbreviations*, *collocations*,¹⁰ *phrasal words*, *acronyms*, *pseudo-neologisms*, *eponyms*, *transferred words*, *internationalisms* and *blends*.¹¹ The author’s view on the concept of neologisms is used for the sake of this paper. The paragraphs that follow are dedicated to the presentation of the instances identified in video games and gaming communities.

Old Words with New Senses

This is the first category of neologisms described by Newmark: “These do not normally refer to new objects or processes [...]”.¹² In other words, a given word has already existed in dictionaries, although it might gain a new meaning.

The first instance of this phenomenon is “*level*”. Its initial meaning refers to a degree of something, for example, the level of one’s language proficiency. However, owing to the existence of video games, this term has gained a meaning of either a number indicating a character’s statistic (see Figure 1) or a map designed to be played (see Figure 2).

⁷ From *Meaning of neologism in English*. Cambridge Dictionary. Retrieved December 16, 2024.

⁸ Minkova & Stockwell, 2009: 12.

⁹ Newmark, 1988: 140.

¹⁰ Newmark also includes *noun compounds* as part of the collocations category.

¹¹ Newmark, 1988: 140-148.

¹² Newmark, 1988: 141.



Figure 1. “Level” as a reference to a character’s statistic¹³



Figure 2. “Level” as a reference to a map designed to be played¹⁴

The word “grind” is another example of such a category. The term refers to an action of reducing something into smaller parts. In the video game register, however,

¹³ Screenshot taken by the author, from Square Enix (2017). *Kingdom Hearts HD 1.5 + 2.5 ReMix* [PlayStation 4 video game].

¹⁴ Screenshot taken by the author, from Naughty Dog (1998). *Crash Bandicoot: Warped* [PlayStation video game].

it is a repetitive, often tedious task performed by the player in order to achieve a given goal. It might occur both as a noun (see Figure 3) or as a verb (see Figure 4).



Figure 3. “Grind” as a noun, used on PSNProfiles forums¹⁵

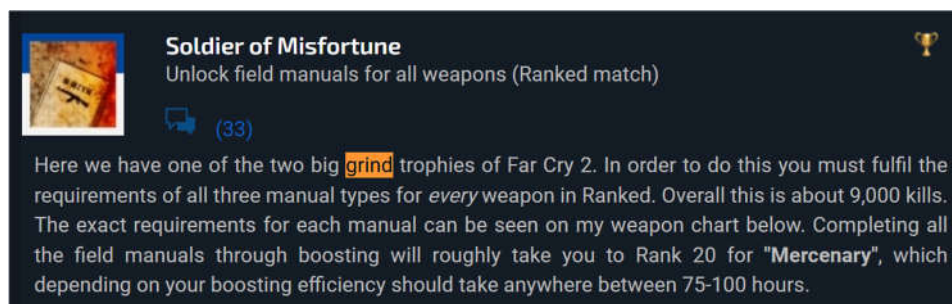


Figure 4. “Grind” as a verb, used in a PlayStation Trophies game guide¹⁶

New Coinages

According to Newmark, existing words might lead to the creation of new lexical units. The author states that “It is a well known hypothesis that there is no such thing as a brand new word; if a word does not derive from various morphemes then it is more or less phonaesthetic or synaesthetic.”¹⁷ This means that in order to create a new coinage, a process of the morphemes’ derivation is often involved.

The same applies to video game-related media. The word “noob” is an example of such a phenomenon. This term is used to refer to a player who is a beginner and lacks skill in games or in a given game. It derives from the word “newbie”. In American English’s phonetics, this lexeme is realised as /*nu:bi*/, meaning that *noob* (/nu:b/) was created by virtue of the deletion of the phoneme /i/. The examples (see Figures 5 & 6) present this occurrence.

¹⁵ From *Worst game with trophies you’ve ever played (all PS consoles) and did you grind through to achieve platinum?*. PSNProfiles. Retrieved December 16, 2024.

¹⁶ From *Far Cry 2 Trophy Guide*. PlayStation Trophies. Retrieved December 16, 2024.

¹⁷ Newmark, 1988: 142.



Figure 5. The word “*noob*”, used on Reddit forums¹⁸

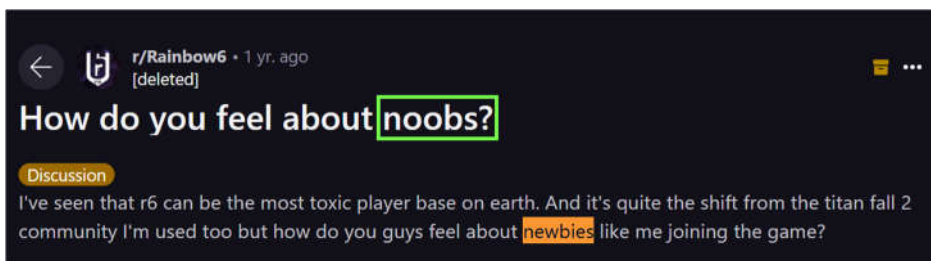


Figure 6. The word “*noob*”, used on Reddit forums¹⁹

Moreover, Figure 6 presents *noobs* being referred to as *newbies* later on in the text. It is undeniably proof of the term’s origin in that word.

Derived Words

This is another category described by Newmark. It involves the addition of affixes to a word in order to develop a new lexeme. “The great majority of neologisms are words derived by analogy from ancient Greek (increasingly) and Latin morphemes usually with suffixes [...]”.²⁰ In a similar manner to new coinages, this category creates new lexical units by modifying their morphological properties.

An instance of such an occurrence is the word “*glitch*”. As far as the video game register is concerned, this lexeme refers to an error in a game. It is possible to add the prefix “*un-*” to the beginning of the word. The result is a new term – (to) *unglitch*. Owing to the negative function of the morpheme “*un-*”, “*unglitch*” simply signifies an action of reversing the effect of an error in a video game. Figure 7 presents an example of such a phenomenon.

¹⁸ From *This game is more fun playing with noobs*. Reddit. Retrieved December 16, 2024.

¹⁹ From *How do you feel about noobs?* Reddit. Retrieved December 16, 2024.

²⁰ Newmark, 1988: 143.

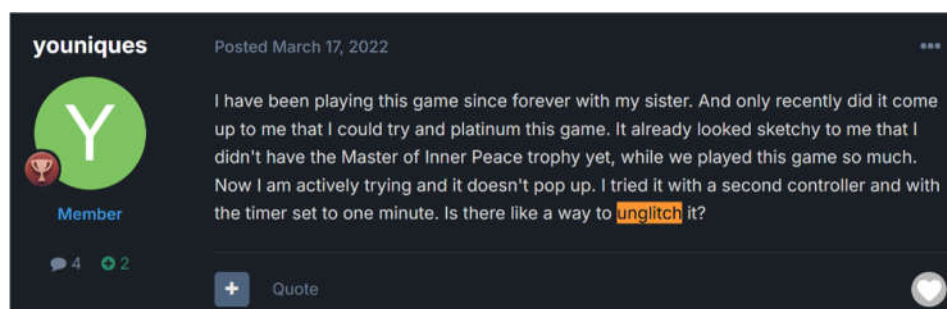


Figure 7. The verb “to unglitch”, used on PSNProfiles forums²¹

A “streamer” is also an instance of a derived word. In the video game register, the word “stream” or “live stream” on its own carries the meaning of a live online broadcast presenting gameplay. The individual who broadcasts the gameplay is referred to as a *streamer*. Once again, a process of derivation can be observed in this case. It is a result of the suffix “-er” being attached to the word “stream”. Figure 8 is an example of this occurrence.

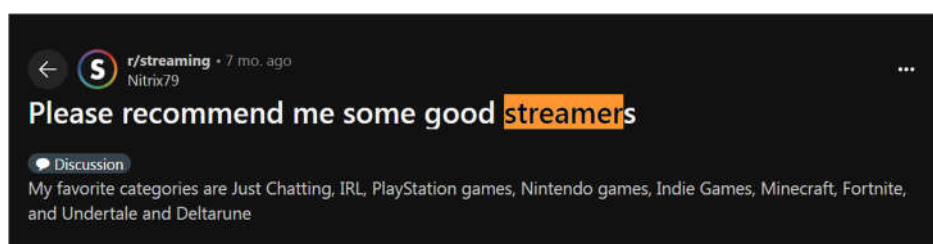


Figure 8. The term “streamer”, used on Reddit forums²²

Abbreviations

Newmark describes this category as “a common type of pseudo-neologism²³ [...]”.²⁴ In other words, they are a shorter substitute for a given word. Its frequency of use is in all likelihood linked to the fact that people have a tendency to shorten the words they speak.

The theoretical part of this paper established that online communication involves the usage of abbreviations. The same applies to the video game register. Abbreviations are commonly used to refer to indications on the user interface, allowing more information to be presented on the screen, or for certain collectible objects so that the player does not have to dedicate their time to reading during gameplay. As far as the instances of this phenomenon are concerned, the figures

²¹ From *Master of Inner Peace trophy glitched*. PSNProfiles. Retrieved December 16, 2024.

²² From *Please recommend me some good streamers*. Reddit. Retrieved March 30, 2024.

²³ The term is further discussed in the section on pseudo-neologisms.

²⁴ Newmark, 1988: 145.

below present the identified occurrences. “*LV*” (see Figure 9) refers to the level of a given character, whilst *XP* (see Figure 10) stands for ‘*experience*’, which represents a unit of points most commonly present in role-playing games.²⁵ “*XP*” is strictly connected to the character’s *level* in a way that the *levels* are given on the basis of *experience points*. In short, this unit indicates the number of points left to attain a new level. Lastly, “*Pts.*” (see Figure 11) simply stands for ‘*points*’. It is a universal abbreviation for any given point unit.



Figure 9. “*LV*” as an abbreviation for ‘*level*’ in the sense of a character’s stat²⁶

²⁵ The concept of role-playing games is elaborated on in the section on acronyms.

²⁶ Screenshot taken by the author, from Gearbox Software (2009). *Borderlands* [PlayStation 3 video game].

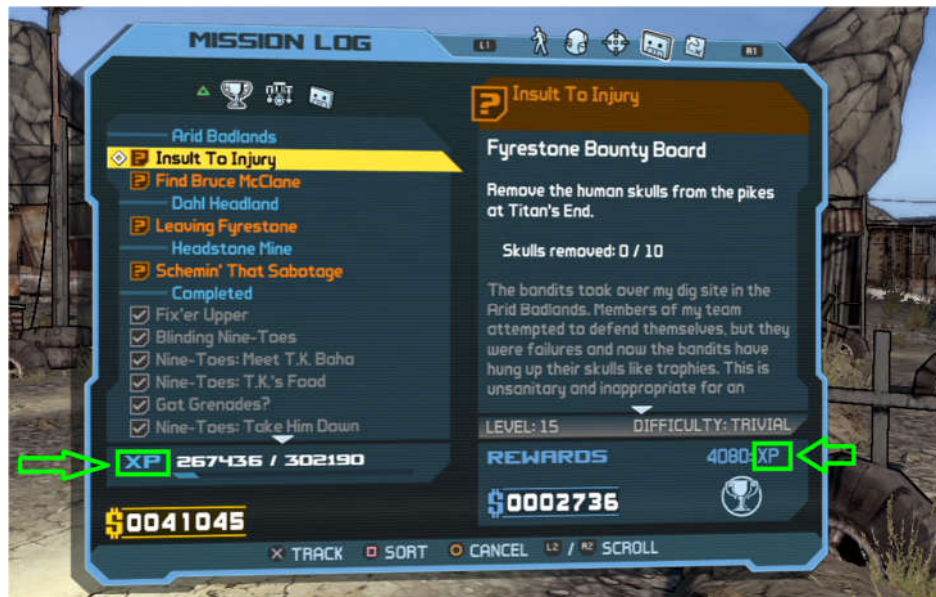


Figure 10. “XP” as an abbreviation for ‘experience’²⁷



Figure 11. “Pts.” as an abbreviation for ‘points’²⁸

²⁷ Screenshot taken by the author, from Gearbox Software (2009). *Borderlands* [PlayStation 3 video game].

²⁸ Image taken from footage of Nintendo EAD (2009). *Wii Sports Resort* [Nintendo Wii video game], as shown in *Wii Sports Resort – Wakeboarding (All levels & Stamps)* [Video]. YouTube. Retrieved December 16, 2024.

Collocations (Including Compounds)

Newmark describes collocations and compounds as one category of neologisms. As a matter of fact, the author believes that “New collocations (noun compounds or adjective plus noun) are particularly common in the social sciences and in computer language.”²⁹ Which is why it is no wonder this phenomenon is also an occurrence in the video game register, since it is related to computer language.

As far as collocations are concerned, one might stumble across them at the very moment of switching on the game. Collocations such as “(to) save a game” (see Figures 12 & 13) or “(to) load a game” (see Figure 14) may be observed in the game’s main menu.



Figure 12. The collocation “(to) save a game”³⁰

²⁹ Newmark, 1988: 145.

³⁰ From Rockstar North (2013). *Grand Theft Auto V* [PlayStation 3 video game].

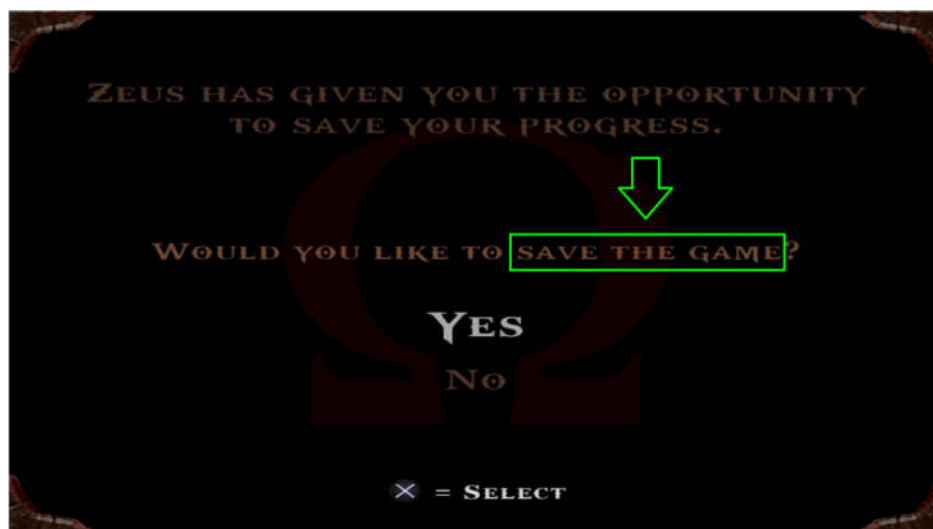


Figure 13. The collocation “(to) save a game”³¹

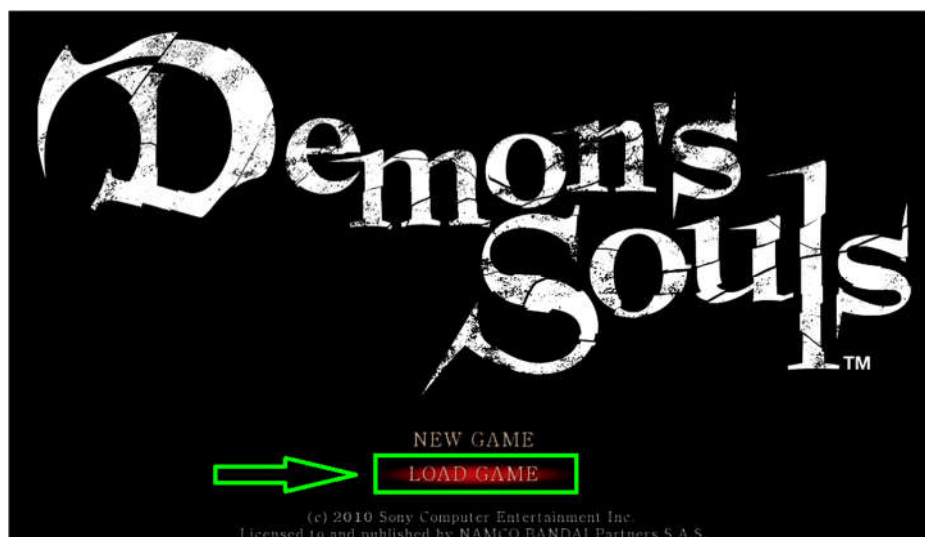


Figure 14. The collocation “(to) load (a) game”³²

Moreover, upon the completion of a *level*, a player may come across the phrase “*level completed*” (see Figure 15), which is a form of the collocation *to “complete*

³¹ Screenshot taken by the author, from Santa Monica Studio (2005). *God of War* [PlayStation 2 video game].

³² Screenshot taken by the author, from FromSoftware (2009). *Demon's Souls* [PlayStation 3 video game].

a level”. In addition, the expression “to grind *EXP*”³³ is a fairly common collocation broadly used in the gaming community. It refers to the process of performing a repetitive task in order to earn experience points in a game. Figures 16 & 17 are instances of this collocation’s usage.

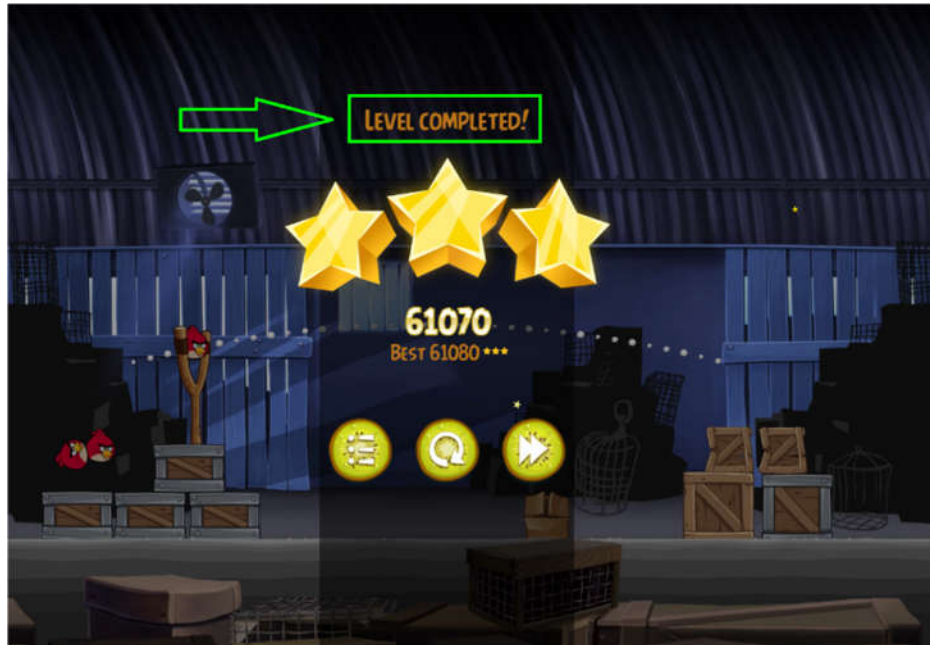


Figure 15. “Level completed” as a form of the collocation “to complete a level”³⁴

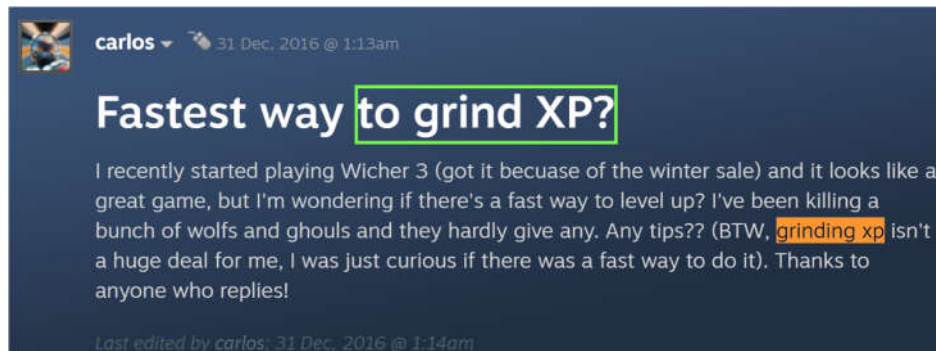


Figure 16. The collocation “to grind *XP*”, used on Steam Community forums³⁵

³³ *EXP* and *XP* are interchangeable abbreviations.

³⁴ Screenshot taken by the author, from Rovio Entertainment (2011). *Angry Birds Rio* [PC video game].

³⁵ From *The Witcher 3: Wild Hunt forums. Steam Community*. Retrieved December 16, 2024.



Figure 17. The collocation *to “grind XP”*, used on Reddit forums³⁶

Taking the concepts of compounds into consideration, “*Cheat Engine*” (see Figure 18) may often be observed in conversations between the players on gaming forums as well. It refers to a computer program used to enter codes, which result in altering the game. “*Rage quit*” (see Figures 19 & 20) is yet another example of this category. The meaning of this compound is an action of leaving a game because of frustration. The player might also break something as a result.

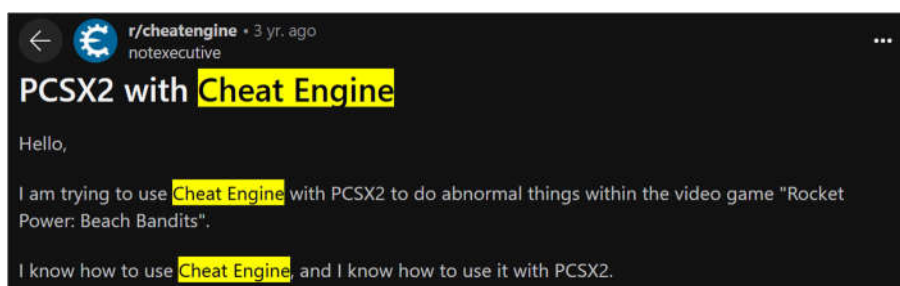


Figure 18. The “*Cheat Engine*” compound, used on Reddit forums³⁷

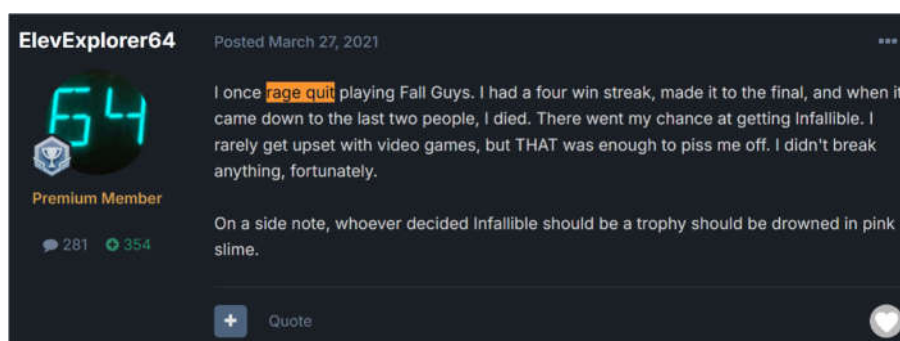


Figure 19. The “*rage quit*” compound, used on PSNProfiles forums³⁸

³⁶ From *How to grind XP faster?* Reddit. Retrieved December 16, 2024.

³⁷ From *PCSX2 with Cheat Engine*. Reddit. Retrieved December 16, 2024.

³⁸ From *Worst Rage Quit Accidents*. PSNProfiles. Retrieved December 16, 2024.



Figure 20. The “*rage quit*” compound, used in the title and description of a YouTube video³⁹

Phrasal Words

This category involves the addition of a preposition after a given verb. Newmark not only classifies this occurrence as an instance of neologisms, but he also believes that “New 'phrasal words' are restricted to English's facility in converting verbs to nouns [...]”.⁴⁰ To paraphrase, phrasal neologisms relate to the English language's inclination to create nouns from verbs. The concept of converting a verb to a noun accompanied by the creation of a phrasal verb is certainly present in video game register as well.

The phrasal words “(to) *level up*” (see Figure 21) and “(to) *power up*” (see Figure 22) can be identified as instances of such a process. “(To) *level up*” refers to an action of raising a character's *level*, which in turn raises their statistics. “(To) *power up*”, on the other hand, describes a process of improving a character's statistics not necessarily by raising their *level*. Moreover, in relation to the conversion of a verb to a noun, presented instances might also operate in that manner. “*Level up*” may mean an item used in order to raise a character's *level*. In the same way, “*power up*” can refer to an item whose purpose is to raise game statistics. Below are the examples of these phenomena.

³⁹ From *Funniest gamer RAGE QUITs #4 - Kids destroying electronics! LOL* [Video]. YouTube. Retrieved December 16, 2024.

⁴⁰ Newmark, 1988: 147.



Figure 21. The phrasal word “level up”⁴¹

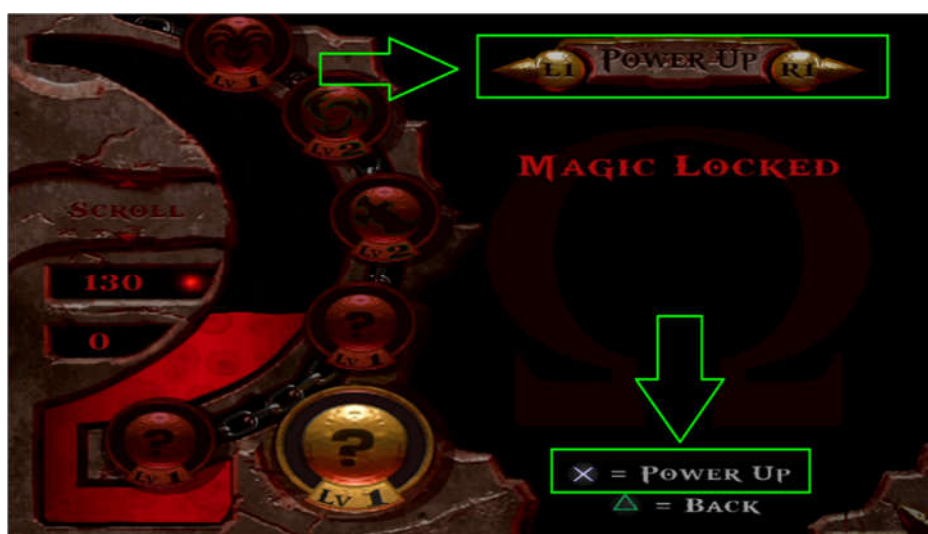


Figure 22. The phrasal word “power up”⁴²

⁴¹ Image taken from footage of Square (1997). *Final Fantasy VII* [PlayStation video game], as shown in *FF7 confirmed FF13 prequel?* Reddit. Retrieved December 16, 2024.

⁴² Screenshot taken by the author, from Santa Monica Studio (2005). *God of War* [PlayStation 2 video game].

Acronyms

Newmark describes acronyms in the following manner:

Acronyms are an increasingly common feature of all non-literary texts, for reasons of brevity or euphony, and often to give the referent an artificial prestige to rouse people to find out what the letters stand for.⁴³

Acronyms operate in a similar manner to abbreviations, both having a function of shortening lexical units. However, as mentioned in the quote, abbreviations encourage individuals to learn the meanings of those terms. As far as the video game register is concerned, this phenomenon might be one of the manners aiming to stimulate gamers' immersion into the community, since it could be not only mystifying, but it can also be seen as a prestigious term.

In video-game-related media, acronyms are often used to refer to game genres. The following examples can be identified: *FPS* (see Figure 23) and *RPG* (see Figure 24). The term “*FPS*” is translated into ‘*First Person Shooter*’, which is a type of game concentrated on shooting other characters, played from a first-person perspective. “*RPG*”, however, refers to ‘*Role-Playing Game*’, that is, a genre focusing on character development and story, often set in a fantasy universe. The examples presented below depict these occurrences.

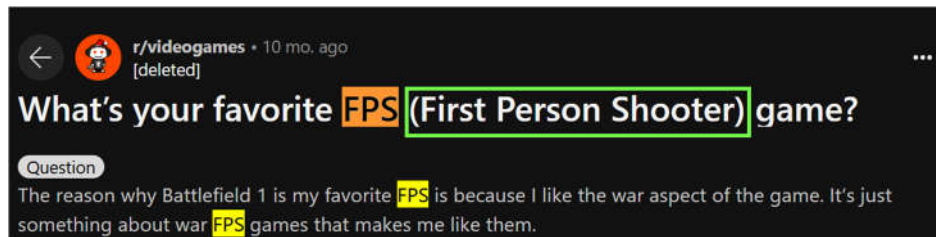


Figure 23. “*FPS*” as an acronym for ‘*First Person Shooter*’, used on Reddit forums⁴⁴

⁴³ Newmark, 1988: 148.

⁴⁴ From *What's your favorite FPS (First Person Shooter) game?* Reddit. Retrieved December 16, 2024.

Dragon Age: Inquisition
 aka: [Dragon Age: Inkwizycja](#)
 Moby ID: 70317

Overview Credits Reviews Covers Screenshots Videos Promos Trivia Specs Releases Patches Prices Forum

Released
 November 18, 2014 on Windows

Credits
 1,353 people

Releases by Date (by platform)
 2014 (Windows)
 2014 (Xbox 360)...

Publishers
 Electronic Arts, Inc.
 ak tronic Software & Services GmbH

Developers
 BioWare Edmonton

Moby Score
 8.5 #402 of 25.7K

Critics
 89% (60)

Players
 ★★★★★ (36)

Review Ranking
 #24 on Xbox One
 #81 on PlayStation 4
 #335 on Windows

Collected By
 166 players

Genre
 Role-playing (RPG)

Perspective
 Behind view

Gameplay
 Action RPG

Interface
 Multiple units/characters control

Setting
 Fantasy

Misc
 Regional differences

Figure 24. “RPG” as an acronym for ‘Role-Playing (game)’ on Moby Games – a database of games⁴⁵

Acronyms might also refer to the descriptions of certain technical factors of a given game, which might relate to the concept of acronyms providing a prestigious feel. For instance, the previously analysed term “FPS” (see Figure 25) also carries a different meaning. This neologism might also be translated into ‘Frames-Per-Second’, referring to the speed of the game. In other words, the quantity of frames displayed per second. The more frames, the faster and smoother the game plays. “DLC” (see Figure 26) is another example of this occurrence. It is translated as ‘Downloadable Content’, which is an (often paid) add-on content created either by the game developers or the community in order to be downloaded by the players. The figures below present these instances.

What are the frames-per-second (FPS) for PlayStation 4 games on PlayStation Now (PSNow) for PC?

All related (35) Sort Recommended

Assistant
 Bot · Aug 16

PlayStation Now (PS Now) streams games at varying frame rates depending on the specific game and the user's internet connection. Generally, most PlayStation 4 games streamed via PS Now on PC aim for 30 FPS. However, some games may run at 60 FPS if they are optimized for streaming and if the internet connection is strong enough to support higher bandwidth.

Figure 25. “FPS” as an acronym for ‘frames-per-second’, used on Quora forums⁴⁶

⁴⁵ From *Dragon Age: Inquisition* entry. MobyGames. Retrieved December 16, 2024.

⁴⁶ From *What are the frames-per-second (FPS) for PlayStation 4 games on PlayStation Now. (PSNow) for PC?* Quora. Retrieved December 16, 2024.

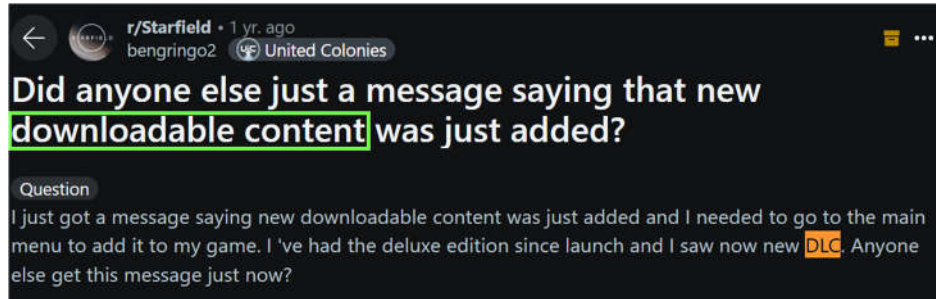


Figure 26. “DLC” as an acronym for ‘downloadable content’, used on Reddit forums⁴⁷

Pseudo-Neologisms

Newmark states that when “a generic word stands in for a specific word”⁴⁸, it is considered an example of a pseudo-neologism. It is a process involving the generalisation of the meaning. For instance, a *personal computer* might be referred to as just a *computer*, or the word “*book*”, which may be used to describe various genres of books, such as *history books*, *romance books*, *horror books*, etc.

This occurrence sees its presence in the video game register. One does not have to search for an example of this phenomenon for long. One of the keywords of this register – “*game*” – is often substituted for the word “*video game*” (see Figure 27). In the same manner, “*code*” is a replacement for “*cheat code*” (see Figure 28). The reason for such processes is most likely their obvious nature as far as video games are concerned. They do not carry any other meanings in this case. The figures below present the identified instances of pseudo-neologisms.

⁴⁷ From *Did anyone else just a message saying that new downloadable content was just added?* Reddit. Retrieved December 16, 2024.

⁴⁸ Newmark, 1988: 148.



Figure 27. “Game” as a pseudo-neologism deriving from “video game”, used on Reddit forums⁴⁹

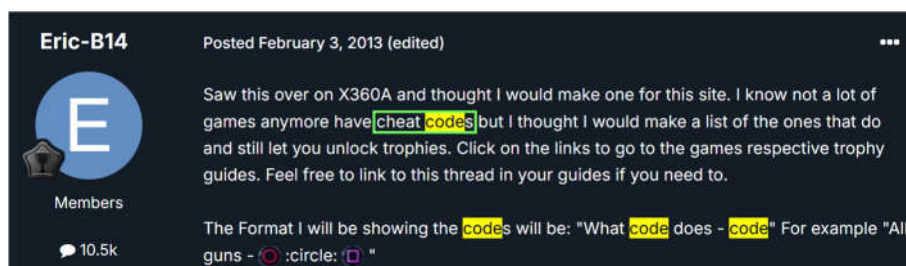


Figure 28. “Code” as a pseudo-neologism deriving from “cheat code”, used on PlayStation Trophies forums⁵⁰

Eponyms

An eponym is defined by Newmark as “any word derived from a proper name”.⁵¹ In other words, the lexical unit is related to a name of an individual. It is most often used in the case of inventions, where their name can be derived from their creator or a company. “Celsius” and “Fahrenheit” degrees are instances of this occurrence.

As far as the video game register is concerned, it is rare for an eponym to be named after one individual because the gaming industry most commonly involves the work of hundreds or thousands of people in order to develop a game. Thus, this category of neologisms sees its existence in the form of an eponym referring to a more abstract proper noun of origin. That is, it may derive from a studio, which was responsible for the game’s development, as in the case of the *Konami Code*

⁴⁹ From *Which games are good for a beginner in playing video games*. Reddit. Retrieved December 16, 2024.

⁵⁰ From *Games with cheat codes that still unlock trophies*. PlayStation Trophies. Retrieved December 16, 2024.

⁵¹ Newmark, 1988: 146.

(see Figure 29). This concept refers to a popular button combination, which inputs a code altering the game. The code was created by Konami and has appeared in a large quantity of games since then.

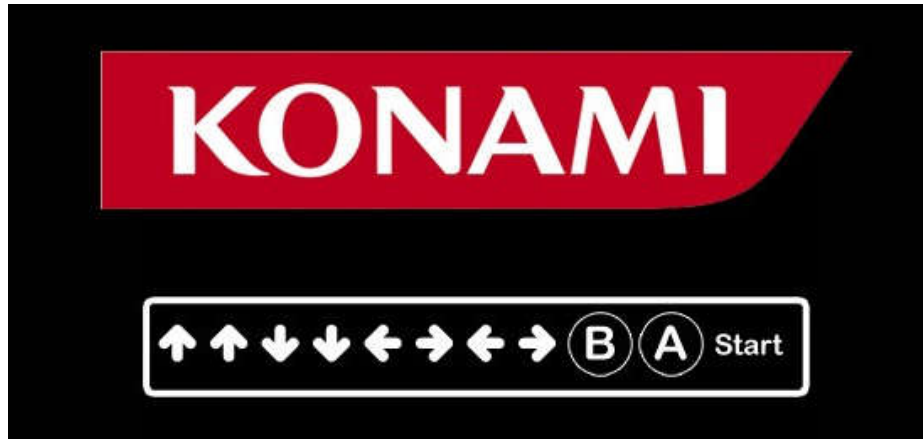


Figure 29. “The Konami Code” button combination illustrated⁵²

The term “*Soulslike*” (see Figure 30) is another instance of this phenomenon; however, it operates in a slightly different manner compared to the *Konami Code*. It is because the term “*Soulslike*” derived not from a game studio but from games instead. It stands for a subgenre, which is characterised by a high level of difficulty and action RPG gameplay. The name originates from the games, which were its first representatives – “*Demon’s Souls*”⁵³ and “*Dark Souls*”⁵⁴. Owing to the usage of this eponym, this subgenre is continuing to gain significance amongst players. Figure 30 presents this occurrence.

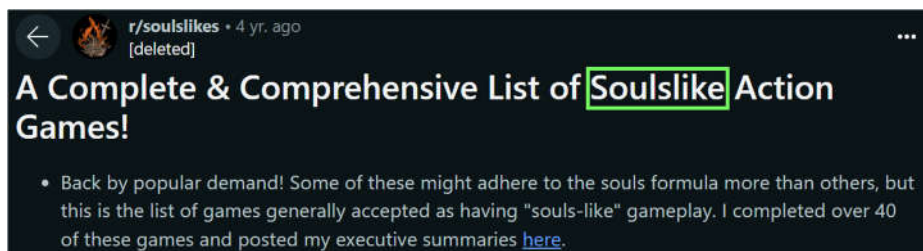


Figure 30. The “*Soulslike*” eponym, used on Reddit forums⁵⁵

⁵² From *Konami Code* page. Gradius Wiki. Retrieved December 16, 2024.

⁵³ FromSoftware (2009). *Demon’s Souls* [PlayStation 3 video game].

⁵⁴ FromSoftware (2011). *Dark Souls* [PlayStation 3 video game].

⁵⁵ From *A Complete & Comprehensive List of Soulslike Action Games!* Reddit. Retrieved December 16, 2024.

Unidentified Cases

There were no identified instances of *transferred words*, *internationalisms* and *blends* during this study. Naturally, that does not signify these phenomena cannot be observed as far as the video game register is concerned.

Transferred words are characterised by Newmark in the following way: “Newly transferred words keep only one sense of their foreign nationality [...]”.⁵⁶ This means that these lexical units undergo a process of transformation from one language to another while seeing their meaning being modified. What is more, “Later, if they are frequently used, they change or develop additional senses [...]”.⁵⁷ To paraphrase, an additional meaning emerges as a result of their increasing popularity. The words “*senior*” and “*bus*” in Polish are an example of this category. “*Senior*” does not signify a formal expression towards an individual but rather a mature, often retired adult. “*Bus*”, on the other hand, refers to a *minibus*. Taking these phenomena into account, an observation can be made that the original sense is present to an extent; however, the meaning differs.

According to Newmark, an *internationalism* is “Strictly a word that keeps the same meaning and the same form in many languages [...]”.⁵⁸ In other words, a lexeme is derived from a certain language of origin, keeping its sense amongst various languages. “*Calculator*” or “*telephone*” may be classified as instances of this category of neologisms.

Lastly, Newmark defines blends as “The fusion of two words into one.”⁵⁹ Thus, two lexical units combine together in order to create a new concept. While blending shares an extent of similarity with compounds, it involves a deletion of syllables, which does not occur in the case of compounding. Instances of such occurrences are “*smog*” and “*brunch*”. “*Smog*” is a derivation of “*smoke*” and “*fog*”, whilst *brunch* is a combination of “*breakfast*” and “*lunch*”.

Outside The Video Game Register – A Comparative Analysis

In order to gain a better understanding of the distinctive features of neologisms in the video game register and their word formation processes, it is worth conducting a comparative analysis between the video game register and social media.

Following the conclusion drawn in the theoretical part, the common usage of abbreviations and acronyms is one of the characteristics of *Netspeak*. Internet users tend to replace some words with abbreviations in order to be able to type faster. *Bc* (see Figure 31), which stands for “*because*”, is one such instance. The creation of this acronym is indeed comprehensible, given its grammatical function as a discourse marker, which certainly contributes to its frequent use.

⁵⁶ Newmark, 1988, 147.

⁵⁷ Newmark, 1988: 147.

⁵⁸ Newmark, 1988: 283.

⁵⁹ Newmark, 1988: 282.

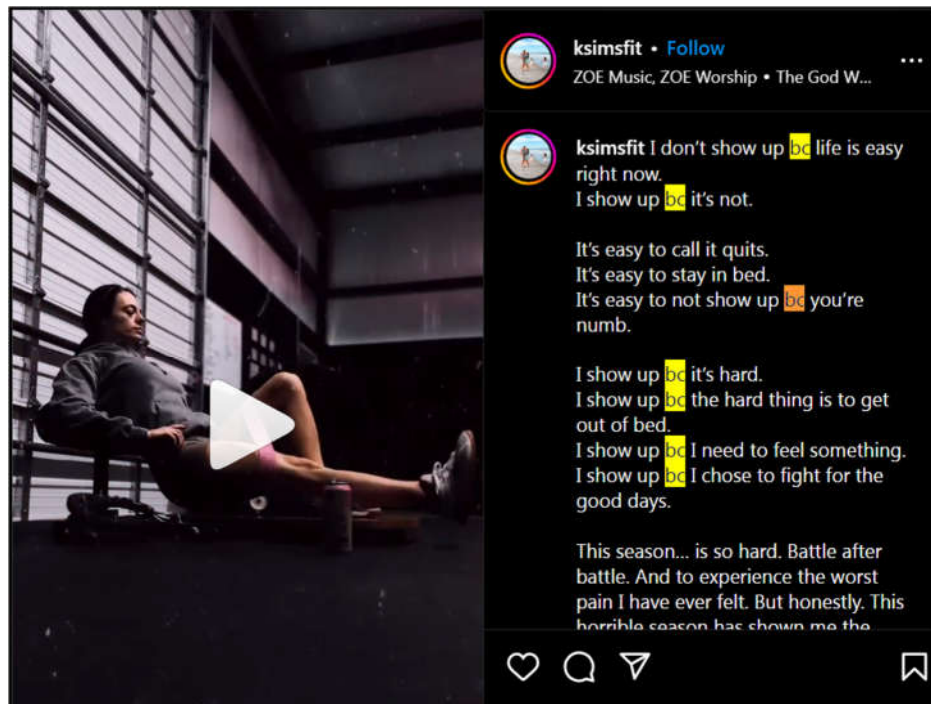


Figure 31. The “bc” abbreviation, used on Instagram⁶⁰

As far as acronyms are concerned, Figure 32 depicts an example of “fomo”. It stands for ‘*Fear of Missing Out*’ which refers to the anxiety felt by Internet users regarding various aspects, such as not participating in an event or being left as the odd one out. Moreover, the language in the following figure is quite informal and incorrect from a grammatical perspective. It is an instance of the distinctive *Netspeak* characteristics described in the theoretical part, notably spelling “guys” with a z, as well as missing the contraction on “I’m”.

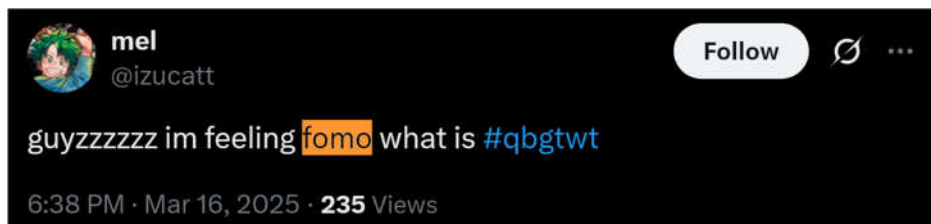


Figure 32. The “fomo” acronym, used on X⁶¹

⁶⁰ From Reel by ksimsfit. Instagram. Retrieved April 3, 2024.

⁶¹ From guyzzzzzz im feeling fomo what is #qbgtwt. X. Retrieved April 3, 2024.

The principal difference between the new coinages created by virtue of social media and the video game register is their theme. The online community develops neologisms which are rather universal in the context of their usage. In the case of the gaming community, however, it is narrowed to the description of video game occurrences. Furthermore, the new lexical concepts in the video game register present more variety in the neologism types. Social media, on the other hand, present more inclination towards abbreviations and acronyms.

Conclusions

This paper not only presents the features of online communication, but it also provides and analyses the definitions of neologisms and the register. On that basis, the characterisation of the video game register can be made.

The identifications of occurrences for the majority of the categories distinguished by Newmark prove that there is an immense number of neologisms created by virtue of video games and gaming-related media. Moreover, the examples provided in this study demonstrate the rich variety of neologism types present in video games. Neologisms are undeniably a common feature of the video game register, and thus, they are one of the proofs of its existence.

In addition, it is worth noting that there exists a relation between Newmark's distinction of neologism categories and the phenomena in video games that this paper describes. This phenomenon signifies that Newmark's perspective, although being formulated in 1988, is relevant at the present time. It is most significant in the case of phrasal words, where a process of verb-to-noun conversion is identified both from the perspective of Newmark and the video game register, where the phrasal words "*level up*" and "*power up*" can also operate as nouns. Other instances include new coinages, compounds and acronyms. New coinages are said to be developed owing to the derivation process, and that is no different in the case of the presented word "*noob*". Taking compounds into account, they might relate to computer language. Thus, the compound "*Cheat Engine*" is an instance of reference to computer language. Acronyms, on the other hand, are thought to possess a mystifying and premium factor. Therefore, the reason for their existence in the case of the video game register is most likely connected to a process of creating an immersion for the players or including a prestigious feel for the technical properties they stand for. The identified examples – *FPS*, *RPG* and *DLC* – accurately illustrate this relation.

As previously established, *blends*, *internationalisms*, and *transferred words* are absent in this study. The reason for such an occurrence may only be speculated. In the case of *blends*, the new coinage of the word's origin can indeed be ambiguous. It is an undeniable fact that the video game register sees its new developments being undergone rapidly. That is why, for the sake of mutual intelligibility of its users, they may prefer creating neologisms which are easily comprehended by others. *Transferred words* are a similar case. Because of the gaming community's international diversity, it is unlikely for them to create different meanings of a word

in order to, once again, ensure mutual understanding. An intriguing contrast is presented by the *internationalisms*. This time, the diversity could speak for the fact that each language will make their own changes in new coinages. Given the diversity of the community, differences are to be expected.

Lastly, one of the distinctive features of neologisms coined by virtue of the video game register is that they describe video game phenomena. A contrast is presented in the case of social media neologisms which display a more universal application.

Further implications

The findings of this study suggest broader implications for research on the video game register as a sociolinguistic phenomenon, as well as from the morphological perspective regarding new coinages created within it. Further study socio-linguistic-wise is essential to investigate the reasons for currently unidentified cases, i.e., *blends*, *internationalisms*, and *transferred words*, as well as the neologism occurrences in social media. Additionally, compiling a dictionary of recently developed terms could serve as a foundational source for further linguistic analysis. Research from the morphological standpoint could explore which types of neologisms are most likely to be developed by the gaming community, as well as the linguistic pattern that they favour when doing so.

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THE PHENOMENON OF FANFICTION AND ITS ROLE IN SECOND LANGUAGE ACQUISITION

Abstract: This article explores the phenomenon of fanfiction and its potential as a tool for second language acquisition. Fanfiction is a form of creative writing based on existing fictional universes that has emerged as a popular cultural practice among online communities. This article also examines how reading and writing fanfiction allows language learning through authentic, context-driven use of a target language. A quantitative survey was conducted with 87 participants (73 students and 14 teachers) who had experience using fanfiction in English as a foreign language. The study suggests that fanfiction can help learners build vocabulary, understand grammar and develop their writing style. Additionally, it considers how fanfiction allows learners to gain confidence in expressing themselves, interact with others, and receive feedback. The article shows that fanfiction can be a fun and effective way to learn a language.

Keywords: fanfiction, online communities, second language acquisition, creative writing.

Streszczenie: W tym artykule autorki badają fenomen fanfikcji i jej potencjał jako narzędzia do przyswajania drugiego języka. Fanfikcja to forma twórczego pisanie oparta na istniejących fikcyjnych uniwersach, która stała się popularną praktyką kulturową wśród społeczności internetowych. Artykuł traktuje o tym, w jaki sposób czytanie i pisanie fanfikcji pozwala na naukę języka poprzez autentyczne, kontekstowe użycie języka docelowego. Przeprowadzono ilościowe badanie ankietowe z udziałem 87 osób (73 uczniów i 14 nauczycieli), które miały doświadczenie w wykorzystywaniu fanfikcji w nauce języka angielskiego. Badanie sugeruje, że fanfikcja może pomóc uczniom w budowaniu słownictwa, zrozumieniu gramatyki i rozwinięciu stylu pisanie. Ponadto analizuje, w jaki sposób fanfikcja pozwala uczniom nabierać pewności siebie w wyrażaniu siebie, wchodzić

w interakcje z innymi i otrzymywać informacje zwrotne. Artykuł pokazuje, że fanfikcja może być zabawnym i skutecznym sposobem na naukę języka.

Słowa kluczowe: fanfiction, społeczności internetowe, nauka języka obcego, pisanie kreatywne.

Introduction

Fanfiction is a global phenomenon, thriving on digital platforms such as Archive of Our Own (AO3) and FanFiction.net. Its roots can be traced back to the mid-twentieth century, originating within science fiction fandoms^{1,2}. However, some argue that fanfiction has existed for far longer, with certain classical works meeting the definition – Dante’s *Inferno*, for instance, is often cited as an example.

Fanfiction is typically defined as a form of derivative work based on existing media. It draws upon what readers and viewers already know about a story or its characters and reimagines them by remixing, extending, or reinterpreting established worlds, narratives and personas. This process serves as a form of open-source creative expression, similar to a film remix³. Unlike traditional literary works, fanfiction is most often informal and participatory – readers and writers interact with each other through feedback or participation in discussions⁴.

From an educational perspective, fanfiction has been recognised for its potential to improve both literacy and creativity as well as critical thinking by allowing learners to experiment with narratives⁵. It also offers authentic, interest-driven opportunities for L2 learners to build literacy skills in reading, writing and cultural interpretation within meaningful contexts⁶. Research shows that fanfiction

¹ I. Åström, *Beyond the final chapter: Exploring fanfiction’s potential for student motivation and learning*, Örebro University Department of Humanities, “Education and Social Sciences English”, Örebro, Sweden, 2024.

² R. N. Calderón, *Usefulness of being part of a linguistic ecosystem (FANDOM) as teenagers and young adults to impulse foreign language development*, Universidad Tecnológica de Pereira Facultad de Bellas Artes y Humanidades Licenciatura en Bilingüismo con énfasis en inglés, Pereira, Spain, 2024.

³ A. Derecho, *Archontic literature: A definition, a history, and several theories of fan fiction*, In: K. Hellekson & K. Busse (Eds.), *Fan Fiction and Fan Communities in the Age of the Internet*, North Carolina, USA, 2006, pp. 61-78.

⁴ F. C. Austin, & W. Santoso, *Exploring the use of fanfiction as authentic materials in English language teaching: A perspective from a reading class*, “Prologue: Journal on Language and Literature”, 9(2), 2023, pp. 286-299. <https://doi.org/10.36277/jurnalprologue.v9i2.128>.

⁵ I. Åström, *Beyond the final chapter: Exploring fanfiction’s potential for student motivation and learning*, Örebro University Department of Humanities, “Education and Social Sciences English”, Örebro, Sweden, 2024.

⁶ R. N. Calderón, *Usefulness of being part of a linguistic ecosystem (FANDOM) as teenagers and young adults to impulse foreign language development*, Universidad Tecnológica de Pereira Facultad de Bellas Artes y Humanidades Licenciatura en Bilingüismo con énfasis en inglés, Pereira, Spain, 2024.

is valuable for learners because it combines multiple forms of literacy. When writing fanfiction, students practise rewriting existing stories, reimagining visual elements and using digital tools. This unique combination helps them understand how different stories and media connect to each other^{7,8}. Participatory in nature, it taps into intrinsic motivation and agency, something that contemporary pedagogical practice, which often prioritises learner-centred and collaborative practices, recognises⁹. In addition to being a language-learning environment, fanfiction communities are also linguistic ecosystems¹⁰, where learners work with peers and provide feedback while developing their language competence in a real context. As a transformative medium, it is not only a tool for language acquisition but also one for identity exploration and cultural exchange, and thus an innovative resource in education.

Second Language Acquisition (SLA) is a key component of education as it deals with the linguistic and cultural needs of ever more interconnected global societies. Grounded in cognitive and sociocultural paradigms, SLA aims to understand how a person internalises and uses a non-native language through exposure, interaction and practice in producing utterances^{11,12}. Conventional pedagogical approaches to SLA, however, sometimes fail to meet the dynamic and context-sensitive requirements of language learning, hence the need for new methodologies that encourage learners' active involvement, autonomy and focus on real-life application^{13,14}. Increasing focus has been placed on authentic and socially embedded practices which compel learners to work simultaneously on identity,

⁷ I. Johansson, Exploring fandom in the classroom: An interview study of attitudes toward and experiences of Fan Fiction among pupils in Swedish upper secondary school, Jönköping University, School of Education and Communication, Jönköping, Sweden, 2024, p. 16.

⁸ D. Stanko, & I. Kolegaeva, The educational potential of fanfiction: Analysis of a derivative text. "Amazonia Investiga", 13(80), 2024, p. 9. <https://doi.org/10.34069/AI/2024.80.08.17>.

⁹ I. Åström, Beyond the final chapter: Exploring fanfiction's potential for student motivation and learning, Örebro University Department of Humanities, Education and Social Sciences English, Örebro, Sweden, 2024.

¹⁰ R. N. Calderón, Usefulness of being part of a linguistic ecosystem (FANDOM) as teenagers and young adults to impulse foreign language development, Universidad Tecnológica de Pereira Facultad de Bellas Artes y Humanidades Licenciatura en Bilingüismo con énfasis en inglés, Pereira, Spain, 2024.

¹¹ P. A. Duff, & S. Talmy, Language socialization approaches to second language acquisition, In: D. Atkinson (Ed.), *Alternative Approaches to Second Language Acquisition*, Routledge, 2011, pp. 95-116.

¹² L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Oxford, 1978.

¹³ G. Murray, X. Gao, & T. Lamb, Identity, motivation and autonomy in language learning, "Multilingual Matters", 2011. DOI:10.1080/17501229.2014.927191.

¹⁴ B. Norton, & K. Toohey, Identity, language learning, and social change, "Language Teaching", 44(4), Cambridge, 2011, pp. 412-446.

agency and linguistic competence¹⁵. Recently, digital tools including gamified platforms and participatory media have provided valuable opportunities for language learning, as learners tend to engage only when the tools align with their interests and motivation¹⁶. In this perspective, innovative strategies for teaching must simultaneously take into account personal relevance, communicative authenticity and linguistic exploration.

Between creativity, digital culture, language and fanfiction lies a critically underrated source for second language learning, bridging the divide between instruction and authentic use. As a participatory activity, fanfiction assists L2 learners in working with language as a social, interactive and iterative process^{17, 18}. For example, L2 learners engaging with fanfiction writing often draw on intertextual practices, integrating tropes from the source material and adopting their own linguistic choices, which facilitate vocabulary acquisition, syntactic fluency and pragmatic awareness¹⁹. Fanfiction sites provide a dialogic environment that fosters reciprocal feedback and many opportunities for collaborative learning, consistent with Vygotsky's²⁰ proposal of the zone of proximal development. Engaging with fanfiction online also elicits multiple interrelated aspects of SLA beyond writing, such as reading comprehension, cultural exploration and identity negotiation^{21, 22}. As such, fanfiction is an exemplar of socially constructed learning, where cognitive,

¹⁵ A. Pomerantz, & E. Kearney, Beyond "write-talk-revise-repeat": Using narrative to understand one multilingual student's interactions with identity and language, "Journal of Second Language Writing", 21(3), 2012, pp. 221-238. <https://doi.org/10.1016/j.jslw.2012.05.013>.

¹⁶ J. Reinhardt, & S. L. Thorne, Beyond comparisons: Frameworks for developing digital L2 literacies, In: M. Thomas (Ed.), Digital education: Opportunities for social collaboration, Groningen, Netherlands, 2011, pp. 159-180.

¹⁷ R. W. Black, Language, culture, and identity in online fanfiction, "E-Learning and Digital Media", 3(2), 2006, pp. 170-184. <https://doi.org/10.2304/elea.2006.3.2.170>.

¹⁸ A. M. Magnifico, J. S. Curwood, & J. C. Lammers, Words on the screen: Broadening analyses of interactions among fanfiction writers and reviewers, "Literacy", 49(3), 2015, pp. 158-166. DOI:10.1111/lit.12061.

¹⁹ F. C. Austin, & W. Santoso, Exploring the use of fanfiction as authentic materials in English language teaching: A perspective from a reading class, "Prologue: Journal on Language and Literature", 9(2), 2023, pp. 286-299. <https://doi.org/10.36277/jurnalprologue.v9i2.128>.

²⁰ L. S. Vygotsky, Mind in society: The development of higher psychological processes, Oxford, 1978.

²¹ I. Åström, Beyond the final chapter: Exploring fanfiction's potential for student motivation and learning, Örebro University Department of Humanities, "Education and Social Sciences English", Örebro, Sweden, 2024.

²² R. N. Calderón, Usefulness of being part of a linguistic ecosystem (FANDOM) as teenagers and young adults to impulse foreign language development, Universidad Tecnológica de Pereira Facultad de Bellas Artes y Humanidades Licenciatura en Bilingüismo con énfasis en inglés, Pereira, Spain, 2024.

linguistic and cultural dimensions of meaning-making are integrated. This article acknowledges the traditional distinction between *Second Language Acquisition (SLA)* as a natural process and *Second Language Learning (SLL)* as a formal one. However, it adopts a broader view of SLA, arguing that fanfiction, as an authentic and interest-driven practice, integrates elements of both processes by bridging formal instruction and spontaneous acquisition.

Study Motivation and Objectives. Research Questions

This study explores the relationship between fanfiction and second language acquisition and considers the implications for both students and teachers. The research is motivated by the need to integrate new student-centred approaches into SLA by asking how fanfiction helps L2 learners acquire linguistic and literacy competence, increase motivation and engage culturally. It adds to the few existing empirical investigations of fanfiction as a pedagogical tool by surveying students and teachers to better understand how it is used in practice, what benefits are perceived to result from its use and what challenges arise when using it. The aim of the investigation is to inform wider debates on the future of SLA through an examination of how digital creativity and language education can intersect, while providing practical recommendations for leveraging the flexible resource that is fanfiction to support language learning in a way that is both inclusive and dynamic.

The main research in this study is anchored in examining how the phenomenon of fanfiction contributes to second language acquisition, particularly in enhancing linguistic competence, literacy development and learner motivation among students in both formal and informal learning contexts. The following specific questions are addressed in this paper:

- a) What are the perceptions of students and teachers regarding the use of fanfiction as a tool for second language learning?
- b) In what specific ways does engaging with fanfiction facilitate the development of key second language skills, such as reading, writing and intercultural communication?

Review of Related Studies

Evolution and Transformative Relevance of Fanfiction

The literary and social practice of fanfiction has become, among other things, a transformative educational tool, especially in language learning. As early as the mid-twentieth century, this practice first developed in fan communities within fanzines and later through digital formats on sites such as FanFiction.net and Archive of Our Own (AO3)^{23, 24}. This evolution is part of a wider trend toward participatory

²³ A. Derecho, Archontic literature: A definition, a history, and several theories of fan fiction, In: K. Hellekson & K. Busse (Eds.), *Fan Fiction and Fan Communities in the Age of the Internet*, McFarland, North Carolina. USA. 2006, pp. 61-78.

²⁴ K. Hellekson, & K. Busse, (Eds.), *Fan fiction and fan communities in the age of the*

media, where audiences help expand the story rather than simply consume it. Fanfiction provides opportunities for language learning through access to authentic, personalised and multimodal texts that are linguistically, culturally and cognitively integrated²⁵. Its inherently interactive nature – where writers and readers provide feedback and co-construct narratives – resonates with communicative language teaching as well as with the focus on multiliteracies^{26, 27}. Situated within this dynamic framework, fanfiction is presented as both a pedagogical tool and a creative outlet, enabling writers to engage with others, strengthen their linguistic competence and develop critical literacy skills.

With growing research interest in fanfiction, scholars are increasingly recognising its pedagogical value in supporting learners' motivation, literacy development and language use. For example, Åström²⁸ showed how fanfiction's informal and interest-driven nature can motivate learners intrinsically. Åström investigated student experiences of using fanfiction assignments in a mixed-methods design and found that these contributed to students' linguistic confidence and narrative creativity. Calderón Rodríguez²⁹ used a qualitative case study to show how teenagers in fanfiction communities promoted their foreign language development. The study focused on the role of fandoms as linguistic ecosystems in which learners acquire new vocabulary, improve reading comprehension and engage in cultural exchange. These findings correspond to prior work such as Black³⁰, which shows that the fanfiction writing practices of adolescents are used as a means of exploring identity and becoming more critically media literate. As such, while these studies illuminate fanfiction's potential as an educational medium, they often fail to provide a rigorous investigation of how educators perceive, evaluate and integrate fanfiction into formal learning environments, leaving behind a significant gap in research.

Internet: New essays, McFarland, London, 2006.

²⁵ R. W. Black, Online fan fiction and critical media literacy, "Journal of Computing in Teacher Education", 26(2), 2009, pp. 75-80.

²⁶ I. Åström, *Beyond the final chapter: Exploring fanfiction's potential for student motivation and learning*, Örebro University Department of Humanities, Education and Social Sciences English, Örebro, Sweden, 2024.

²⁷ K. Chandler-Olcott, & D. Mahar, *Adolescents' anime-inspired "fanfictions": An exploration of multiliteracies*, "Journal of Adolescent & Adult Literacy", 46(7), 2003, pp. 556-566.

²⁸ I. Åström, *Beyond the final chapter: Exploring fanfiction's potential for student motivation and learning*, Örebro University Department of Humanities, Education and Social Sciences English, Örebro, Sweden, 2024.

²⁹ R. N. Calderón, *Usefulness of being part of a linguistic ecosystem (FANDOM) as teenagers and young adults to impulse foreign language development*, Universidad Tecnológica de Pereira Facultad de Bellas Artes y Humanidades Licenciatura en Bilingüismo con énfasis en inglés, Pereira, Spain, 2024.

³⁰ R. W. Black, *Adolescents and online fan fiction*, California, USA, 2008.

Secondly, methodologies employed in fanfiction research have ranged widely from qualitative, through quantitative, to mixed methods. For instance, Johansson³¹ conducted a qualitative study involving interviews and classroom observations with secondary school students and teachers who used fanfiction in class. The findings indicated generally positive responses, with students highlighting improved engagement and creativity. However, teachers raised concerns about curriculum alignment and a lack of institutional support or training for implementing fanfiction in formal contexts. In contrast, Stanko and Kolegaeva³² used a textual analysis approach to examine derivative fanfiction texts and assess their potential to increase narrative complexity and intertextuality. To investigate L2 learners' adaptability and creativity in digital writing environments, Jacobsen and Kristensen McLaclan³³ mapped the linguistic patterns and stylistic choices of fanfiction authors using computational analysis. These studies are valuable contributions, but they tend to disproportionately favour the learner's perspective at the expense of the teacher's and of pedagogical frameworks. Moreover, while some studies emphasise the informal learning benefits of fanfiction for second language acquisition (SLA), few discuss how those benefits can be systematically integrated into formal SLA contexts.

Synthesising these insights, the present research attempts to address these gaps by investigating fanfiction in SLA from both student and teacher perspectives, along with its practical ramifications, challenges and potential extensions to innovative language pedagogy.

Second Language Acquisition and Learning. Review of Theories and Methods

In this study, SLA is understood broadly to include both acquisition and formal learning processes, reflecting how learners develop language in instructed as well as informal contexts. There are many theories that underpin second language acquisition (SLA); theories which explain the cognitive, social and cultural nature of language learning. Krashen's Input Hypothesis is an example of a cognitive approach, in which learners are expected to develop through comprehensible input (input above a learner's current proficiency level)³⁴. Sociocultural theories, largely

³¹ I. Johansson, *Exploring fandom in the classroom: An interview study of attitudes toward and experiences of Fan Fiction among pupils in Swedish upper secondary school*, Jönköping University, School of Education and Communication, Jönköping, Sweden, 2024.

³² D. Stanko, & I. Kolegaeva, *The educational potential of fanfiction: Analysis of a derivative text*, "Amazonia Investiga", 13(80), 2024, pp. 204-214. DOI: <https://doi.org/10.23856/6414>.

³³ M. Jacobsen, & R. D. Kristensen-McLachlan, (2024). *Admiration and frustration: A multidimensional analysis of fanfiction*, In: W. Haverals, M. Koolen, & L. Thompson (Eds.), *Computational Humanities Research 2024*, CEUR-WS, 2024, Arhus, Denmark, pp. 93-112.

³⁴ J. C. Richards, & T. S. Rodgers, *Approaches and methods in language teaching* (3rd ed.), Cambridge, 2014.

based on Vygotsky's³⁵ work, argue that learners develop through meaningful communication within their zone of proximal development (ZPD), since social interaction is central to the learning process. These frameworks emphasise dialogic practices and collaboration in language learning, and highlight the tension between utilising technological tools for instruction and supporting communication and socialisation, as learning must occur within the social world. Identity-focused theories, including those by Norton and Toohey³⁶, investigate how learners negotiate their identities within linguistic communities, taking into account the dynamic interplay of language, power and social change. Taken together, these theoretical foundations help to describe the complexity of SLA as a mixture of linguistic, psychological and cultural factors that shape learners' experiences and outcomes.

The methods in SLA trace an equally varied historical path, from teacher-centred approaches to more learner-centred, communicative orientations. Conventional methods, including grammar-translation and audio-lingual teaching, emphasise drilling responses and grammatical correctness, which could not engage learners in real language use³⁷. By contrast, communicative language teaching (CLT) promotes interaction, task-based learning and real-world communication³⁸, adhering to theories of meaningful, contextualised language use. Multiliteracies pedagogy – also an innovation in SLA – integrates digital tools and multimodal texts, enabling learners to develop critical literacy and cultural awareness³⁹. Digital and participatory approaches, such as those described by Reinhardt and Thorne⁴⁰, use online platforms and social networking to provide learning environments that are gamified to increase learner motivation and agency. These methods are designed to bridge the gap between formal instruction and authentic, interest-driven learning, and they illustrate the importance of adaptive and inclusive strategies in SLA.

The theories and methods reviewed above provide a critical lens for understanding the role fanfiction plays in SLA. Drawing on sociocultural theories, particularly Vygotsky's⁴¹ premise that situations offer learners interaction and

³⁵ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Oxford, 1978.

³⁶ B. Norton, & K. Toohey, *Identity, language learning, and social change*, "Language Teaching", 44(4), Cambridge, 2011, pp. 412-446.

³⁷ J. C. Richards, & T. S. Rodgers, *Approaches and methods in language teaching* (3rd ed.), Cambridge, 2014.

³⁸ P. A. Duff, & S. Talmy, *Language socialization approaches to second language acquisition*, In: D. Atkinson (Ed.), *Alternative Approaches to Second Language Acquisition*, Routledge, 2011, pp. 95-116.

³⁹ New London Group, *A pedagogy of multiliteracies: Designing social futures*, "Harvard Educational Review", 66(1), 1996, pp60-92.

⁴⁰ J. Reinhardt, & S. L. Thorne, *Beyond comparisons: Frameworks for developing digital L2 literacies*, In: M. Thomas (Ed.), *Digital education: Opportunities for social collaboration*, 2011, pp. 159-180, California, San Francisco, USA.

⁴¹ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*,

feedback through which they co-construct knowledge in authentic communication, fanfiction as a form of digital literacy is participatory and collaborative. Fanfiction practices are situated within the activity of identity negotiation, which corresponds with Norton and Toohey's⁴² discussion of how learners use language to shape identities in progress. Fanfiction's multimodal and intertextual nature also supports multiliteracies pedagogy by providing learners with opportunities to grapple with linguistic and cultural differences while expanding their literate practice^{43, 44}. Methodologically, the integration of fanfiction in SLA follows task-based learning principles, allowing learners to develop meaningful, interest-driven tasks that promote linguistic and narrative creativity⁴⁵. These intersections are important in positioning fanfiction as both a theoretical and practical resource in SLA, as they bridge the formal and informal domains of learning and promote well-rounded language development.

Study Methodology

Research Design and Study Approach

A quantitative research approach is adopted in this study, using survey methodology that collects numerical data to help understand the perceptions and experiences of the participants. The purpose of the research is descriptive, as it attempts to systematically examine how EFL teachers and students use fanfiction to improve their reading and writing skills. This design yields measurable responses to structured questionnaires, thereby ensuring objectivity and allowing for statistical analysis to identify patterns and trends. The survey aimed to explore both broad and specific aspects of the use of fanfiction in second language acquisition, particularly its effects on literacy development and learner motivation.

Sampling Technique and Sample Size

For this study, the participants were randomly sampled in order to ensure diversity as well as representativeness from a wide demographic spectrum. A social media plan was followed for conducting recruitment from platforms visited by educators and students involved in EFL instruction and learning. The 14 EFL

Oxford, 1978.

⁴² B. Norton, & K. Toohey, *Identity, language learning, and social change*, "Language Teaching", 44(4), Cambridge, 2011, pp. 412-446.

⁴³ J. Reinhardt, & S. L. Thorne, Beyond comparisons: Frameworks for developing digital L2 literacies, In: M. Thomas (Ed.), *Digital education: Opportunities for social collaboration*, California, San Francisco, USA, 2011, pp. 159-180.

⁴⁴ I. Åström, Beyond the final chapter: Exploring fanfiction's potential for student motivation and learning, Örebro University Department of Humanities, Education and Social Sciences English, Örebro, Sweden, 2024.

⁴⁵ R. W. Black, Online fan fiction, global identities, and imagination, *Research in the Teaching of English*, 43(4), 2009, pp. 397-425.

teachers and 73 EFL students in the sample had all previously employed fanfiction as a means of teaching or boosting second language reading and writing proficiency. This criterion was necessary in order for respondents to be able to give an informed perspective on the pedagogical significance of fanfiction. The application of random sampling helped to minimise selection bias, and the use of social media platforms ensured that participants from diverse regions could participate.

Data Collection Method

An online survey tool (Google Forms) was used as the primary tool to collect data that was sent to respondents and collected online. The questionnaire was divided into four main sections: demographics, perceptions of fanfiction in SLA, and other sections. The last three sections utilised a four-point Likert scale (Strongly Agree, Agree, Disagree, Strongly Disagree) to ascertain the respondents' agreement toward various statements. It provided a structure for categorisation and quantification of participants' responses. Survey items used the phrasing "second language learning" for accessibility but are interpreted here within the broader SLA framework outlined above.

Administration of the Survey

The survey was administered solely via online modes to ensure that participants could be reached conveniently. Social media groups, forums and professional networks established in EFL teaching and learning were used to disseminate the links to the Google Form questionnaire. The survey participants were provided with the details necessary for completing the survey and some information on the objective and purpose of the study. As the mode of administration was online, data was collected from geographically dispersed respondents, ensuring diversity at a lower cost. Respondents were able to volunteer and were also informed that they could withdraw at any time without penalty.

Data Analysis Tools

Simple descriptive statistical methods, such as frequencies, percentages, means and standard deviations, were used to analyse the collected data. The tools were chosen due to their effectiveness in summarising and delivering quantitative data in a clear, interpretable fashion.

Ethical Considerations

Ethical integrity was a major consideration in the study. All participants gave informed consent to participate, having been made aware of the purpose, method and benefits of the study. Anonymity and confidentiality were assured; personal information was removed from all data records and analyses. The data collected were stored securely on encrypted digital platforms and were accessible only to the researchers.

Results and Discussions

The results of the collected data are presented in several subunits, including demographic features and other key components. All results are summarised in tables, with brief explanatory notes provided alongside.

Table 1. Demographic variables of study participants

Demographic variable	Category	Frequency (n)	Percentage (%)
Age	Under 18	15	16.30%
	18-25	38	41.30%
	26-35	22	23.90%
	36-45	9	9.80%
	46 and above	3	3.30%
Educational Background	Secondary school	20	21.70%
	Bachelor's degree	47	51.10%
	Master's degree	16	17.40%
	Doctoral degree	4	4.30%
Role	Teacher	14	15.20%
	Student	73	84.80%
Level of Experience with Fanfiction	None	10	10.90%
	Beginner (less than 1 year)	28	30.40%
	Intermediate (1-3 years)	38	41.30%
	Advanced (more than 3 years)	11	12.00%

Most of the participants (41.30%) were 18-25 years old, while those aged 46 years and older formed the smallest group (3.30%). About 51.10% of the participants held a bachelor's degree, 21.70% had a high school education and 4.30% had a doctoral degree. The majority of the sample comprised students (84.80%), with teachers making up the rest (15.20%). Regarding their experience with fanfiction in SLA, 41.30% of participants had 1-3 years' experience, 30.40% were beginners, 12.00% were advanced (4-5 years' experience) and 10.90% had no experience. These results are characteristic of a sample dominated by young participants with diverse educational levels and varying degrees of fanfiction practice in language learning.

Table 2. Perceptions of fanfiction in SLA

Survey item	SA (%)	A (%)	D (%)	SD (%)	Mean	SD
Fanfiction is an effective tool for enhancing second language learning.	40.2	37.9	14.9	6.9	3.12	0.85
Fanfiction provides authentic contexts for practising language skills.	36.8	42.5	13.8	6.9	3.09	0.83
Fanfiction promotes creativity and engagement in the language learning process.	45.9	33.3	13.8	6.9	3.18	0.86
Fanfiction aligns with innovative teaching/learning approaches, such as task-based or communicative methods.	34.5	39.1	20.7	5.7	3.02	0.87

The data demonstrate a robust consensus among participants regarding the positive role of fanfiction in SLA. The majority of respondents agreed or strongly agreed that fanfiction facilitates second language learning (78.1%), and levels of agreement were likewise high for fanfiction as a means of providing authentic practice contexts (79.3%). However, they showed the highest agreement when it came to supporting creativity and engagement, with 79.2% of participants in favour. The slightly lower mean for alignment with innovative teaching approaches (3.02) indicates that while participants acknowledge the potential of fanfiction, they may also identify barriers to incorporating the practice within traditional learning frameworks.

Table 3. Engagement with fanfiction (teachers)

Survey item	SA (%)	A (%)	D (%)	SD (%)	Mean	SD
I incorporate fanfiction into my lesson plans to teach reading and writing skills.	28.6	35.7	21.4	14.3	2.79	0.99
Using fanfiction motivates my students to engage with the target language.	42.9	35.7	14.3	7.1	3.14	0.86
I encourage students to participate in fanfiction communities for language practice.	21.4	42.9	21.4	14.3	2.71	0.94
Fanfiction helps me teach cultural nuances of the target language effectively.	35.7	42.9	14.3	7.1	3.07	0.85

Mostly, teachers reported positive engagement with fanfiction in their instructional practices. Most agreed or strongly agreed that fanfiction prompts student motivation (78.6%) and assists with teaching cultural nuances (78.6%). Engagement was more limited in practice, with only 64.3% reporting that they incorporate fanfiction into lesson plans or encourage participation in fanfiction communities. Mean scores from 2.71 to 3.14 indicate varied degrees of adoption and perceptions of its pedagogical use.

Table 4. Engagement with fanfiction (students)

Survey item	SA (%)	A (%)	D (%)	SD (%)	Mean	SD
I actively engage with fanfiction as part of my language learning activities.	31.5	38.4	21.9	8.2	2.93	0.91
Writing or reading fanfiction motivates me to learn and practise the target language.	41.1	37.0	15.1	6.8	3.13	0.87
I participate in fanfiction communities to improve my language skills.	27.4	34.2	24.7	13.7	2.75	1.01
Fanfiction helps me understand cultural aspects of the target language.	39.7	35.6	17.8	6.8	3.08	0.89

Overall, students saw fanfiction as a compelling and motivational tool for learning languages (78.1%), helping them understand cultural aspects (75.3%), and more. To be clear, however, not all individuals who reported experience with

fanfiction are active participants in fanfiction communities. While almost 90% of participants reported some level of experience with fanfiction (Table 1), only 61.6% of students reported active participation in such communities. Overall, the mean scores reflected positive responses (2.75 to 3.13), with some variation in the level of engagement.

Table 5. Impact of fanfiction (teachers)

Survey item	SA (%)	A (%)	D (%)	SD (%)	Mean	SD
My students' reading comprehension skills improved through the use of fanfiction.	35.7	42.9	14.3	7.1	3.07	0.85
Writing fanfiction helps students expand their vocabulary and grammar.	42.9	35.7	14.3	7.1	3.14	0.86
Fanfiction fosters creativity in students' writing practices.	50.0	35.7	7.1	7.1	3.29	0.82
Using fanfiction has positively impacted students' confidence in using the target language.	35.7	42.9	14.3	7.1	3.07	0.85

Strong positive agreement was reported by teachers on the impact of fanfiction on students' language skills in enhancing their creativity (85.7%) and their vocabulary and grammar (78.6%). On these points, over 78% of teachers also rated confidence building and reading comprehension highly. Teachers' consistently high mean scores (3.07-3.29), coupled with the relatively narrow range of standard deviations across the items, indicate that they strongly agreed fanfiction is a valuable resource for supporting a variety of language learning tasks.

Table 6. Impact of fanfiction (students)

Survey item	SA (%)	A (%)	D (%)	SD (%)	Mean	SD
Reading fanfiction has improved my comprehension of the target language.	39.7	37.0	17.8	5.5	3.11	0.84
Writing fanfiction has helped me improve my vocabulary and grammar skills.	41.1	35.6	15.1	8.2	3.10	0.91
Fanfiction has enhanced my ability to write coherent and creative narratives.	45.2	34.2	13.7	6.8	3.18	0.87
Engaging with fanfiction has made me more confident in using the target language in real-life situations.	38.4	39.7	16.4	5.5	3.11	0.84

Students overwhelmingly agreed that the reading and writing of fanfiction has a positive effect on their language skills, particularly in helping them improve their ability in creative and coherent writing (79.4%). Vocabulary and grammar improvement (76.7%), reading comprehension (76.7%), and confidence building (78.1%) also held high agreement. All mean scores were above 3.0, showing strong positive perceptions, with the highest rating for narrative writing.

Discussion of Findings

Results show strong agreement between teachers and students that fanfiction is a powerful tool to support Second Language Acquisition (SLA). This directly answers the first research question about perceptions of fanfiction as a pedagogical resource in SLA. There was widespread agreement among participants that fanfiction facilitates authentic contexts for language practice, as well as creativity and engagement. These results are in line with recent research, such as Åström⁴⁶, which highlighted that fanfiction fosters learners' motivation by providing real-world applications of language in personalised and meaningful settings. Austin and Santoso⁴⁷ likewise found that fanfiction's interpolation and narrative extension open riskier avenues for creativity in language use. However, while Åström showed very high levels of engagement across all linguistic skills, our present data indicate that some participants perceive fanfiction as difficult to integrate seamlessly into structured curricula (lower mean score of 3.02 for its alignment with innovative pedagogical methods).

Fanfiction, the key component of the study, also provided insights into participants' behaviour and attitudes through their engagement. The differentiated experiences of teachers and students were used to answer the second research question regarding how participants interacted with fanfiction in SLA. Results indicated teachers' moderate integration of fanfiction into lesson plans, with 64.3% including fanfiction elements in teaching reading and writing. This is consistent with findings from Stanko and Kolegaeva⁴⁸, who noted that teachers acknowledge fanfiction as a useful resource but are often hindered by the demands of standardised curricula and assessment practices.

Students, on the other hand, reported higher levels of engagement in informal contexts, with 75.3% using fanfiction to explore cultural aspects of the target language. This confirms Calderón Rodríguez's⁴⁹ finding that fanfiction communities are linguistic ecosystems in which L2 learners participate in authentic, interest-driven interactions. The variation between teacher and student engagement levels

⁴⁶ I. Åström, *Beyond the final chapter: Exploring fanfiction's potential for student motivation and learning*, Örebro University Department of Humanities, Education and Social Sciences English, Örebro, Sweden, 2024.

⁴⁷ F. C. Austin, & W. Santoso, *Exploring the use of fanfiction as authentic materials in English language teaching: A perspective from a reading class*, "Prologue: Journal on Language and Literature", 9(2), 2023, pp. 286-299. <https://doi.org/10.36277/jurnalprologue.v9i2.128>.

⁴⁸ D. Stanko, & I. Kolegaeva, *The educational potential of fanfiction: Analysis of a derivative text*, "Amazonia Investiga", 13(80), 2024, pp. 204-214.

⁴⁹ R. N. Calderón, *Usefulness of being part of a linguistic ecosystem (FANDOM) as teenagers and young adults to impulse foreign language development*, Universidad Tecnológica de Pereira Facultad de Bellas Artes y Humanidades Licenciatura en Bilingüismo con énfasis en inglés, Pereira, Spain, 2024.

reflects differing priorities: Johansson⁵⁰ reminds us that while students desire autonomy and creativity, teachers are constrained by institutions, a condition more often observed than personally experienced.

This study represents a critical contribution through its analysis of the SLA skills with which fanfiction engages. There was overwhelming evidence that fanfiction fosters language integration; both teachers and students found it had positive effects on reading comprehension, vocabulary acquisition, and narrative writing. In line with Black's⁵¹ claim that fanfiction facilitates learners' engagement with complex texts and intertextual and intercultural awareness, these findings align well. They also build on Magnifico, Curwood, and Lammers⁵², who argued that fanfiction improves narrative coherence and cultivates iterative writing practices shaped by peer feedback in online communities. However, the present study also highlights a key gap. Students reported an increased sense of confidence in their ability to communicate in the target language under real-life circumstances, but this was less apparent among teachers, who may be overlooking fanfiction's communicative potential. Jacobsen and Kristensen-McLachlan⁵³ viewed addressing this gap as possibly including professional development initiatives that train teachers to make better use of fanfiction in speaking and conversational practice.

Both student and teacher responses show how the motivational dimension of fanfiction can lead to transformation. A majority of participants agreed that fanfiction encourages learners to use the target language, supporting Åström's⁵⁴ observation that it gives learners' language goals meaning because their interests are also involved. Specifically, teachers reported that students felt confident using fanfiction, similar to the findings of Stanko⁵⁵ on the pragmatic functions of fanfiction in self-expression. Yet, despite Calderón Rodríguez's⁵⁶ highlighting of the

⁵⁰ I. Johansson, *Exploring fandom in the classroom: An interview study of attitudes toward and experiences of Fan Fiction among pupils in Swedish upper secondary school*, Jönköping University, School of Education and Communication, 2024.

⁵¹ R. W. Black, *Online fan fiction, global identities, and imagination*, "Research in the Teaching of English", 43(4), 2009, pp. 397-425.

⁵² A. M. Magnifico, J. S. Curwood, & J. C. Lammers, *Words on the screen: Broadening analyses of interactions among fanfiction writers and reviewers*, "Literacy", 49(3), 2015, pp. 158-166. DOI:10.1111/lit.12061.

⁵³ M. Jacobsen, & R. D. Kristensen-McLachlan, (2024). *Admiration and frustration: A multidimensional analysis of fanfiction*, In: W. Haverals, M. Koolen, & L. Thompson (Eds.), *Computational Humanities Research 2024*, CEUR-WS, 2024, pp. 93-112.

⁵⁴ I. Åström, *Beyond the final chapter: Exploring fanfiction's potential for student motivation and learning*, Örebro University Department of Humanities, Education and Social Sciences English, 2024.

⁵⁵ D. Stanko, *Pragmatic functions of fanfiction*. *Academia Polonica*, Scientific journal of Polonia University, 64(3), 2024, pp. 116-120.

⁵⁶ R. N. Calderón, *Usefulness of being part of a linguistic ecosystem (FANDOM) as teenagers and young adults to impulse foreign language development*, Universidad

participatory and immersive nature of fanfiction communities, this study shows that teachers and students were less likely to be active participants in such communities.

The study also suggests how fanfiction can contribute to current SLA pedagogical initiatives, including task-based learning and multiliteracies pedagogy. Teachers and students recognised the potential of fanfiction to develop creativity, cultural exploration, and linguistic experimentation, in line with Austin and Santoso's⁵⁷ argument that fanfiction is authentic material for language teaching. Jacobsen and Kristensen-McLachlan⁵⁸ likewise showed that fanfiction can help learners acquire multiliteracies, such as digital literacy and intercultural competence. Though the present study highlights these strengths, it also shows the difficulties of including fanfiction in formal educational settings. Similarly, Swedish educators interviewed by Johansson⁵⁹ shared that fanfiction fits well with communicative and task-based methods but often languishes because of its non-standardised nature.

Conclusions and Implications of Findings

In this study, the perceptions, engagement, and impact of fanfiction use in second language acquisition (SLA) were investigated from both teacher and student perspectives. The results emphasise the pedagogical potential of fanfiction to develop linguistic competence, promote creativity, and provide authentic contexts for language use. Participants from both groups agreed that fanfiction increases reading comprehension, vocabulary acquisition, and narrative writing skills, in line with contemporary pedagogical approaches such as task-based learning and multiliteracies pedagogy. Students were more engaged with fanfiction, particularly in exploring cultural aspects of the target language, while teachers identified it as a motivational tool and a means of developing learners' confidence. Moreover, although the study opened a path to greater fanfiction engagement, it also highlighted two foreseeable challenges: limited participation in fanfiction communities and difficulties in aligning fanfiction activities with the formal curriculum. These insights contribute to the growing body of evidence (see Åström⁶⁰, Calderón

Tecnológica de Pereira Facultad de Bellas Artes y Humanidades Licenciatura en Bilingüismo con énfasis en inglés, 2024.

⁵⁷ F. C. Austin, & W. Santoso, *Exploring the use of fanfiction as authentic materials in English language teaching: A perspective from a reading class*, Prologue: Journal on Language and Literature, 9(2), 2023, pp. 286-299.

⁵⁸ M. Jacobsen, & R. D. Kristensen-McLachlan, (2024). *Admiration and frustration: A multidimensional analysis of fanfiction*, In: W. Haverals, M. Koolen, & L. Thompson (Eds.), *Computational Humanities Research 2024*, CEUR-WS, 2024, pp. 93-112.

⁵⁹ Ibidem.

⁶⁰ I. Åström, *Beyond the final chapter: Exploring fanfiction's potential for student motivation and learning*, Örebro University Department of Humanities, Education and Social Sciences English, Örebro, Sweden, 2024.

Rodríguez⁶¹) that recognises fanfiction's transformative function in SLA while also problematising its integration into formal educational settings.

The study makes valuable contributions but also faces limitations. Because survey data are self-reported, they are useful for capturing perceptions and insights but may also involve biases, such as overreporting engagement or underreporting challenges. In addition, the relatively small sample size – specially for teachers – reduces the generalisability of the results. Future research using larger and more diverse samples, and mixed-methods approaches that combine surveys with classroom observations or interviews, could provide a more in-depth understanding of the practical applications of fanfiction. Nevertheless, the results hold important implications for SLA pedagogy. Educators and policymakers should consider including fanfiction as a resource in their teaching frameworks in order to foster learner-centred, engaging, and culturally immersive practices. Furthermore, teacher professional development programmes should provide strategies for using fanfiction, overcoming barriers to classroom implementation, and supporting respectful participation in fanfiction communities. By bridging the boundary between informal and formal learning contexts, fanfiction can serve as an innovative, inclusive, and contextually relevant addition to language education practices.

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⁶¹ R. N. Calderón, *Usefulness of being part of a linguistic ecosystem (FANDOM) as teenagers and young adults to impulse foreign language development*, Universidad Tecnológica de Pereira Facultad de Bellas Artes y Humanidades Licenciatura en Bilingüismo con énfasis en inglés, Pereira, Spain, 2024.

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IN SEARCH OF TRANSLATION EQUIVALENCE: CREATION OF FEAR IN THE READERS OF STEPHEN KING'S NOVELS

Abstract: Translation is not merely a simple word-for-word conversion from one language to another but a complex process that requires consideration of cultural and stylistic contexts. Horror literature, known for building suspense, an atmosphere of unease, and deep emotions, presents linguistic, cultural, and stylistic challenges to translators. This paper discusses the ways in which translation equivalence is established in creating fear in the readers of Stephen King's horror books by examining the Polish translations of excerpts from the selected works of the author. Our analysis provides insights into the challenges faced by translators of horror literature and how they can effectively meet these challenges, creating translations that are not only linguistically accurate but also true to the spirit of the original. From our scrutiny, it clearly follows that Polish translators have effectively conveyed both the content and the atmosphere, as well as the emotions, of the original texts. Translators have successfully strived to faithfully reproduce the content and structure of the original. Key elements, such as descriptions of places, characters, and events, have been preserved with great accuracy. This allows Polish readers to experience the story in a manner very close to the original. In conclusion, the scrutinized translations of Stephen King's books into Polish are carried out with great care and accuracy, maintaining fidelity to the original and conveying the atmosphere and emotions characteristic of King's works.

Keywords: translation, horror literature, Stephen King, translation analysis, translation challenges, translation strategy.

Streszczenie: Tłumaczenie nie jest jedynie prostym procesem przekładania słów z jednego języka na drugi, lecz złożonym zadaniem wymagającym uwzględnienia kontekstów kulturowych i stylistycznych. Literatura grozy, znana z budowania napięcia, atmosfery niepokoju oraz wywoływania głębokich emocji, stawia przed tłumaczami wyzwania zarówno językowe, jak i kulturowe oraz stylistyczne.

Niniejszy artykuł omawia sposoby, w jakie ekwiwalencja tłumaczeniowa jest osiągana w kontekście wywoływania strachu u czytelników horrorów Stephena Kinga, poprzez analizę polskich tłumaczeń fragmentów wybranych dzieł tego autora. Nasza analiza dostarcza wglądu w wyzwania stojące przed tłumaczami literatury grozy oraz w sposoby ich skutecznego przezwyciężania, pozwalające tworzyć przekłady, które nie tylko są językowo precyzyjne, ale również wiernie duchowi oryginału. Z naszych badań wynika jasno, że polscy tłumacze skutecznie oddali zarówno treść, jak i atmosferę oraz emocje zawarte w oryginalnych tekstach. Tłumacze starali się wiernie odtworzyć treść i strukturę oryginału. Kluczowe elementy, takie jak opisy miejsc, postaci i wydarzeń, zostały zachowane z dużą dokładnością. Dzięki temu polscy czytelnicy mogą doświadczać historii w sposób bardzo zbliżony do pierwowzoru. Podsumowując, przeanalizowane tłumaczenia książek Stephena Kinga na język polski cechuje wysoka staranność i dokładność, które pozwalają zachować wierność oryginałowi oraz oddać atmosferę i emocje charakterystyczne dla twórczości Kinga.

Słowa kluczowe: tłumaczenie, literatura grozy, Stephen King, analiza tłumaczeń, wyzwania tłumaczeniowe, strategie tłumaczeniowe.

Introduction

As Venuti holds “translation is not merely a linguistic exercise but a cultural negotiation that shapes and reshapes meaning for new audiences” [Venuti; 3]¹. Translation is a multifaceted endeavor that extends far beyond the straightforward task of converting words from one language into another. It is an intricate process that demands an acute sensitivity to the interplay of linguistic, cultural, and stylistic elements, all of which shape the meaning and impact of a text. These challenges are particularly pronounced in the realm of horror literature, a genre uniquely reliant on crafting atmospheres of suspense, unease, and emotional intensity. Translating such works requires not only a deep understanding of the source language and culture but also an ability to faithfully recreate the author’s intent, tone, and the visceral experiences they seek to elicit in readers.

This paper investigates the pursuit of translation equivalence in the context of Stephen King’s horror literature, focusing on the ways Polish translations endeavor to replicate the fear-inducing elements of his narratives. King’s works are celebrated for their ability to immerse readers in vivid, unsettling worlds where ordinary settings are imbued with a pervasive sense of dread. Achieving equivalence in such translations involves more than maintaining linguistic accuracy; it necessitates the preservation of narrative tension, psychological complexity, and cultural references that resonate with readers across linguistic divides.

¹ Venuti, L. (2008). *The Translator’s Invisibility: A History of Translation*. London: Routledge.

Through a detailed analysis of Polish translations of selected excerpts from King's works, this study examines the translators' strategies in capturing key components of his horror storytelling – such as evocative descriptions, intricate character dynamics, and the subtle interplay of fear and suspense. Particular attention is given to the cultural and stylistic adaptations required to ensure these elements resonate with Polish audiences while remaining true to King's distinctive style.

By shedding light on the creative and technical challenges inherent in translating horror, this paper not only underscores the complexity of the task but also highlights the ingenuity of Polish translators in their efforts to recreate the psychological and emotional depth of King's stories. In doing so, it reveals the delicate balance required to achieve translation equivalence and offers broader insights into the art of translating fear, bridging the gap between linguistic fidelity and the profound emotional experiences central to the horror genre.

Horror: Construction and the psychology of fear

The literary genre of horror has long fascinated readers, offering them the opportunity to experience intense emotional experiences, arousing fear and amazement. The unknown and mystery are the foundation of horror, creating an atmosphere of uncertainty and narrative drive. The reader is immersed in a world where unknown and dangerous forces exist and solving the mystery becomes the motivation to continue reading. Placing characters in isolated places, deprived of usual forms of support, increases their helplessness in the face of the approaching threat. The feeling of loneliness intensifies fear and at the same time makes the reader identify more strongly with the characters. Transformations in horror are often both physical and symbolic. The characters experience not only external metamorphoses, but also internal changes, which add psychological depth and intensify the feeling of threat. The theme of inevitability means that the characters, despite their attempts to avoid the threat, realize that it is inevitable. This growing tension makes the reader feel more and more involved in the fate of the characters. Horror literature also explores areas of the human psyche, revealing the fears, obsessions and inner demons of characters. Moreover, as Carroll says, "the emotional intensity of horror stems from its ability to activate primal fears through narrative techniques that exploit suspense, ambiguity, and anticipation" [Carroll, 28]². The above means that horror literature appeals to archetypal fears, using ambiguity and tension to engage the reader emotionally. What is more, the characters' mental decline creates a more subtle but equally terrifying type of fear.

Blurring the boundaries between reality and fantasy introduces the reader to a world of uncertainty. A narrative that disorients creates an atmosphere in which each event can be interpreted in many ways. Elements related to the occult, magic and supernatural phenomena add depth and mystery to the plot. The reader becomes a participant in rituals and spells that provoke not only fear but also fascination. Dark

² Carroll, N. (1990). *The Philosophy of Horror: Or, Paradoxes of the Heart*. Routledge.

family stories, full of hidden secrets and curses, show how the past can influence the present. This family tension intensifies the drama and atmosphere of horror. The authors violate the reader's expectations of safety by introducing danger into even the most routine situations. This undermines the reader's confidence and increases feelings of anxiety. Unconventional narrative structures, such as non-linear plots or accounts in the form of diaries or letters, allow the authors to root the reader even deeper in the atmosphere of horror, disorienting him and deepening the feeling of uncertainty. These means of expression enrich and diversify the narrative, making the reader more involved in the story³ [Clasen; 91-117].

Although the topic of building fear in horror films is broad and varied, it is also worth considering a few additional aspects that may affect the effectiveness of this process. In horror literature, building fear is a subtle art that requires a balanced approach to a variety of narrative elements. The characters' internal monologue is a key part of this process, enabling the authors to show the characters' deep emotions, fears and dilemmas. It is the internal dilemmas that give fear a more personal and intimate character. The start-to-finish narrative structure allows for a controlled gradation of tension. The initial mysteries and riddles encourage the reader to continue reading and the gradual reveal of fear elements makes the climax more effective and terrifying. Raising the pace of the action is key to keeping the reader's attention. Dynamic descriptions of fights, flights and sudden plot twists intensify the experience of fear, keeping the reader in suspense and uncertainty. Paranormal elements introduce an additional dimension of horror, enabling the authors to explore supernatural forces and phenomena. Manipulating the perception of reality and showing the elusive nature of fear increases the level of uncertainty. The use of metaphors allows you to transform fear into a symbolic representation of deeper fears or traumas. This tool allows authors to access more complex aspects of the human experience. Balancing between rational explanations and supernatural elements introduces uncertainty about the source of fear, encouraging the reader to continue analysis and interpretation. Transferring fear from another context, for example from the science fiction or fantasy genre, allows authors to surprise the reader and break traditional patterns, which enhances the effect of fear⁴ [Martin; 5-7]. Manipulation of time and space, through surprising changes in location, weather conditions, or time jumps, adds a layer of disorientation, increasing the feeling of anxiety. The use of cultural symbolism allows the authors to tap into common fears and mythologies, creating fear rooted in cultural archetypes. Creating a captivating story, full of secrets, plot twists and deep threads, makes the reader emotionally involved, which intensifies the effect of fear. In summary, effective fear building in horror literature is a delicate combination of various narrative techniques

³ Clasen, Mathias. (2017) *Why Horror Seduces*. Oxford University Press.

⁴ Martin, G. Neil. (2019). "(Why) Do You Like Scary Movies? A Review of the Empirical Research on Psychological Responses to Horror Films". *Frontiers in Psychology* 10, 2298.

that work together to create an atmosphere of suspense, tension and terror, leaving the reader with a memorable experience⁵ [Clasen; 91-117].

Horror literature demands a delicate balance of linguistic precision and creative interpretation, as it often relies on nuanced emotional and psychological elements. Translators face the formidable task of preserving not just the meaning of words but the visceral reactions they evoke. This challenge is amplified when translating Stephen King's works, where the tension lies as much in what is said as in what is implied. To fully appreciate the artistry and complexity of translating King's stories into Polish, it is essential to explore the interplay between language and atmosphere, and how the unique features of his narratives are adapted for a new audience. This exploration will shed light on the broader challenges of translating horror, offering insights into the intricacies of crafting translations that are faithful to the original while resonating deeply with a different cultural context.

Fear in King's books and their translations

Translating literature is an exceptionally demanding task, especially when it comes to the horror genre. As Nida and Taber says, "translators must navigate between linguistic fidelity and cultural adaptation, ensuring the preservation of the narrative's emotional core" [Nida and Taber; 124]⁶. Horror literature, known for building suspense, an atmosphere of unease and deep emotions, presents challenges to translators that are not only linguistic but also cultural and stylistic. In particular, the works of Stephen King, one of the most acclaimed authors of horror, require translators to faithfully convey both the content and the author's distinctive style.

The analysis of translations of selected works by King, such as *It*, *Misery*, *The Shining*, *Pet Sematary*, *Carrie*, *Graveyard Shift*, *Salem's Lot*, *The Stand* and *The Tommyknockers*, allows for an assessment of how well Polish translators have managed to capture the essence of these works. Each of these novels contains elements that are crucial for building horror: intense descriptions, subtle details that enhance suspense and complex relationships between characters that highlight their psychological struggles and fears.

In this analysis, we will focus on several aspects of the translations: fidelity to the original, preservation of atmosphere and tension and the ability to convey the emotions of the characters. We will examine how Polish translators approached the translation of King's works and what strategies they employed to transfer his unique style into Polish.

We will look at specific excerpts and compare them with the original to see if the dynamics and atmosphere of the original text have been preserved and if these translations capture the unique horror climate that is the hallmark of Stephen King's work. Through this analysis, we will gain a better understanding of the challenges that horror literature presents to translators and how they can effectively meet these

⁵ Clasen, Mathias. (2017) *Why Horror Seduces*. Oxford University Press.

⁶ Nida, E. A., and Taber, C. R. (2003). *The Theory and Practice of Translation*. Brill.

challenges, creating translations that are not only linguistically accurate but also true to the spirit of the original.

Table 1. Translation Analysis

QUOTES FROM BOOKS	TRANSLATION	ANALYSIS
<i>Beverly held onto the edge of the sink, her eyes wide and full of terror. Blood spurted from the drain, faster and faster, until the sink began to fill. But it wasn't the blood that was the worst. The worst were the voices that started to come from the drain – children's voices, full of pain and despair</i> ⁷ [King, Stephen. <i>It</i> . Scribner, 2017; 338].	<i>Beverly trzymała się na krawędzi umywalki, jej oczy były szeroko otwarte i pełne przerażenia. Krew tryskała z odpływu, coraz szybciej i coraz mocniej, aż umywalka zaczęła się wypełniać. Ale to nie krew była najgorsza. Najgorsze były głosy, które zaczęły dochodzić z odpływu – dziecięce głosy, pełne bólu i rozpacz</i> . ⁸ [King, Stephen. Trans. <i>It</i> . Trans. by Robert Lipski, Albatros, 2017; 338. (original: Scribner, 2017)].	Fidelity to the original: The translation is faithful to the original, accurately capturing the content and structure. Key details, such as Beverly's actions and the description of the blood and voices, are preserved. Preservation of atmosphere and tension: The horror and tension are effectively maintained. The translator uses vivid language to mirror the original's impact, ensuring the scene's progression and escalating terror are conveyed. Ability to convey the emotions of the characters: The translation successfully conveys Beverly's fear, using emotive language to make her terror palpable. Phrases like " <i>jej oczy były szeroko otwarte i pełne przerażenia</i> " effectively translate the original's emotional intensity. Conclusion: The translation by Robert Lipski maintains fidelity to Stephen King's text, preserving the atmosphere, tension and emotions. Polish readers experience the same horror and intensity as in the original.
<i>Something in the drain watched. Something that now opened its great, dark, tooth-filled mouth and grinned in a monstrous smile. The red balloon popped with a bang. Georgie couldn't move or scream. That thing in the drain moved, it rose up and down, it was stupid, a circus madman, like a dancing clown</i> . ⁹ [King, Stephen. <i>It</i> . Scribner, 2017; 14.]	<i>Coś w kanalizacji obserwowało. Coś, co teraz otworzyło wielkie, wypełnione czarnymi zębami usta i wyszczerzyło je w potwornym uśmiechu. Czerwona piłka z trzaskiem pękła. Georgie nie mógł się ruszyć ani krzyknąć. To coś w kanalizacji poruszało się, podnosiło się w górę i w dół, to było głupie, wariat z cyrku, jak tańczący klaun</i> . ¹⁰ [Lipski, Robert, trans. <i>It</i> . Albatros, 2011; 14. (Original: Scribner, 2017)].	Fidelity to the original: The translation faithfully captures the content and structure of the original text. Key details and sequences are preserved accurately. Preservation of atmosphere and tension: The eerie atmosphere and building tension are effectively conveyed. Vivid descriptions, such as " <i>wielkie, wypełnione czarnymi zębami usta</i> " (great, dark, tooth-filled mouth), maintain the horror. Ability to convey the emotions of the characters: Georgie's fear and paralysis are well conveyed. The translation captures his inability to move or scream, reflecting his terror accurately. Conclusion: Robert Lipski's translation effectively maintains the fidelity, atmosphere and emotional intensity of Stephen King's original text, ensuring Polish readers experience the same horror and tension.
<i>Danny stood in front of the door to Room 217, his hand hovering over the knob. He</i>	<i>Danny stał przed drzwiami pokoju 217, jego ręka zawisała nad klamką. Wiedział, że nie</i>	Fidelity to the original: The translation is faithful to the original, accurately capturing the content and sequence. Key

⁷ King, Stephen. (2017). *It*. Scribner.

⁸ King, Stephen. (2017). Trans. *It*. Trans. by Robert Lipski, Albatros.

⁹ King, Stephen. (2017). *It*. Scribner.

¹⁰ Lipski, Robert, (2011). Trans. *It*. Albatros.

<i>knew he shouldn't go in there, that something bad was waiting on the other side. But something pulled him, he couldn't resist. Slowly, he opened the door and saw that the room was dark, but he could feel the presence of something, something that was waiting for him.</i>¹¹ [King, Stephen. <i>The Shining</i>. Anchor, 2012; 219].	<i>powinien tam wchodzić, że coś złego czeka po drugiej stronie. Ale coś go ciągnęło, nie mógł się oprzeć. Powoli otworzył drzwi i zobaczył, że pokój jest ciemny, ale czuł obecność czegoś, co tam było, coś, co na niego czekało.</i>¹² [Zarzecki, Krzysztof, trans. <i>Łśnienie</i>. Publisher: Prószyński i S-ka; 219. (Original: Anchor, 2012)].	phrases, such as "his hand hovering over the knob" and "something bad was waiting on the other side", are effectively translated as "jego ręka zawisa nad klamką" and "coś złego czeka po drugiej stronie". Preservation of atmosphere and tension: The translation maintains the eerie atmosphere and building tension. The sense of foreboding and Danny's internal conflict are preserved, with phrases like "coś go ciągnęło, nie mógł się oprzeć" (something pulled him, he couldn't resist) effectively conveying the original's suspense. Ability to convey the emotions of the characters: Danny's fear and the irresistible pull towards the room are well conveyed in the translation. The emotional intensity is maintained, allowing readers to empathize with Danny's dread and curiosity. Conclusion: Krzysztof Zarzecki's translation faithfully captures the content, atmosphere and emotions of Stephen King's original text, ensuring that Polish readers experience the same sense of suspense and fear.
<i>Then suddenly the hotel began to live, began to breathe. It was as if all the walls, floors and ceilings were living tissues. You could feel something deep inside slowly waking up.</i>¹³ [King, Stephen. <i>The Shining</i>. Anchor, 2012; 307].	<i>Potem nagle hotel zaczynał żyć, zaczynał oddychać. Było tak, jakby wszystkie ściany, podłogi, sufity były żywymi tkankami. Czulo się, jakby coś głęboko w środku powoli budziło się do życia.</i>¹⁴ [Zarzecki, Krzysztof, trans. <i>Łśnienie</i>. Publisher: Prószyński i S-ka; 307. (Original: Anchor, 2012)].	Fidelity to the original: The translation accurately captures the original content and structure, preserving the key details and sequence of events. Preservation of atmosphere and tension: The eerie atmosphere and sense of awakening are effectively maintained. The language used in the translation mirrors the original's vivid imagery, such as "hotel zaczynał żyć, zaczynał oddychać" and "jakby wszystkie ściany, podłogi, sufity były żywymi tkankami". Ability to convey the emotions of the characters: The translation conveys the sense of something ominous waking up within the hotel, maintaining the original's suspense and tension. The feeling of the hotel coming to life is preserved, allowing readers to feel the growing unease. Conclusion: Krzysztof Zarzecki's translation effectively maintains the fidelity, atmosphere and emotional depth of Stephen King's original text, ensuring that Polish readers experience the same sense of foreboding and tension.
<i>She screamed as the elevator doors closed, trapping her and she heard the slow, steady</i>	<i>Krzyknęła, gdy drzwi windy się zamknęły, uwięziły ją, i usłyszała powolne, jednostajne</i>	Fidelity to the original: The translation accurately captures the original content and structure, ensuring all key details and

¹¹ King, Stephen. (2012). *The Shining*. Anchor.

¹² Zarzecki, Krzysztof, trans. *Łśnienie*. Publisher: Prószyński i S-ka.

¹³ King, Stephen. (2012). *The Shining*. Anchor.

¹⁴ Zarzecki, Krzysztof, trans. *Łśnienie*. Publisher: Prószyński i S-ka.

<i>creak of the thing approaching.</i>¹⁵ [King, Stephen. <i>The Shining</i>. Anchor, 2012; 331].	<i>skrzypienie nadchodzącego.</i>¹⁶ [Zarzecki, Krzysztof, trans. <i>Łśnienie</i>. Publisher: Prószyński i S-ka; 331. (Original: Anchor, 2012)].	actions are preserved. <u>Preservation of atmosphere and tension:</u> The translation maintains the tense atmosphere and sense of impending danger. Phrases like "<i>powolne, jednostajne skrzypienie</i>" (slow, steady creak) effectively convey the original's suspenseful mood. <u>Ability to convey the emotions of the characters:</u> The translation successfully conveys the character's fear and sense of entrapment. The phrase "<i>krzyknęła, gdy drzwi windy się zamknęły, uwięziły ją</i>" mirrors the original's intensity, making the reader feel the character's panic. Conclusion: Krzysztof Zarzecki's translation maintains the fidelity, atmosphere and emotional intensity of Stephen King's original text, ensuring that Polish readers experience the same sense of fear and suspense.
<i>Paul Sheldon lay on the bed, tied to its frame. He tried to move, but the bonds were too tight. Suddenly, the door to the room opened and Annie Wilkes stood there with a large hammer in her hand. She smiled. 'Time for lesson number one, Paul', she said softly and his heart began to pound with fear.</i>¹⁷ [King, Stephen. <i>Misery</i>. Viking Penguin, 1987; 135].	<i>Paul Sheldon leżał na łóżku, przywiązany do jego ramy. Próbowal się ruszyć, ale więzy były zbyt mocne. Nagle drzwi do pokoju otworzyły się i stanęła w nich Annie Wilkes z dużym młotkiem w ręku. Uśmiechnęła się. 'Czas na lekcję numer jeden, Paul', powiedziała miękko, a jego serce zaczęło walić z przerażenia.</i>¹⁸ [Mazan, Maciejka, trans. <i>Misery</i>. Publisher: Albatros; 156. (Original: Viking Penguin, 1987)].	<u>Fidelity to the original:</u> The translation faithfully captures the content and structure of the original text. Key details, such as Paul being tied to the bed, the tight bonds and Annie Wilkes' entrance with a hammer, are accurately rendered. <u>Preservation of atmosphere and tension:</u> The translation effectively maintains the atmosphere and tension. The description of Paul trying to move but being unable to and the sudden entrance of Annie with a hammer, preserves the sense of dread and impending violence. <u>Ability to convey the emotions of the characters:</u> The translation conveys the fear and helplessness of Paul Sheldon. The phrase "<i>jego serce zaczęło walić z przerażenia</i>" accurately reflects the original's description of his heart pounding with fear. Annie's soft yet menacing dialogue is preserved, adding to the tension. Conclusion: Maciejka Mazan's translation maintains the fidelity, atmosphere and emotional intensity of Stephen King's original text, ensuring that Polish readers experience the same fear and suspense as those reading the original.
<i>She walked slowly toward him, her smile wide and terrible. The syringe gleamed in her hand.</i> [King, Stephen. <i>Misery</i>. Viking Penguin, 1987; 89].	<i>Szła powoli w jego stronę, z szerokim i strasznym uśmiechem. Strzykawka błyszczała w jej ręce.</i> [Mazan, Maciejka, trans. <i>Misery</i>. Publisher: Albatros;	<u>Fidelity to the original:</u> The translation is faithful to the original, preserving key elements like the slow movement, wide and terrible smile and the gleaming syringe. <u>Preservation of atmosphere and tension:</u> The translation effectively maintains the atmosphere and tension. The

¹⁵ King, Stephen. (2012). *The Shining*. Anchor.

¹⁶ Zarzecki, Krzysztof, trans. *Łśnienie*. Publisher: Prószyński i S-ka.

¹⁷ King, Stephen. (1987). *Misery*. Viking Penguin.

¹⁸ Mazan, Maciejka, trans. *Misery*. Publisher: Albatros.

	89. (Original: Viking Penguin, 1987)].	use of "powoli" (slowly) and "straszny" (terrible) helps preserve the ominous mood and sense of impending danger. <u>Ability to convey the emotions of the characters:</u> The emotions of the characters are effectively conveyed. The descriptive words make the reader feel the same tension and unease as in the original. Conclusion: Maciejka Mazan's translation is faithful to Stephen King's original text, effectively preserving the atmosphere, tension and emotions. Polish readers experience the same suspense and unease as those reading the original.
<i>Louis walked through the cemetery, the darkness thick and impenetrable. He could hear only his footsteps and his heartbeat. Suddenly, he felt he was not alone. He turned and saw a pair of glowing eyes in the dark. They were eyes that looked at him with deep, inhuman hunger. Louis Creed knew he had entered the land of the dead. He could feel it in the cool, still air and see it in the twisted, gnarled trees that bordered the path.</i>¹⁹ [King, Stephen. <i>Pet Sematary</i>. Scribner, 2018; 167].	<i>Louis szedł przez cmentarz, ciemność była gęsta i nieprzenikniona. Słyszał tylko swoje kroki i bicie serca. Nagle poczuł, że nie jest sam. Obrócił się i zobaczył parę świecących oczu w ciemności. To były oczy, które patrzyły na niego z głębokim, nieludzkim głodem. Louis Creed wiedział, że wszedł do krainy umarłych. Czuł to w chłodnym, nieruchomym powietrzu i widział w poskręcanych, pokreconych drzewach, które otaczały ścieżkę.</i>²⁰ [Królicki, Zbigniew A., trans. <i>Smętarz dla zwierzaków</i>. Publisher: Albatros; 167. (Original: Scribner, 2018)].	<u>Fidelity to the original:</u> The translation maintains high fidelity to the original text. The key details such as Louis walking through the cemetery, the impenetrable darkness, the glowing eyes and the twisted trees are accurately rendered. <u>Preservation of atmosphere and tension:</u> The atmosphere and tension are effectively preserved in the translation. The description of the thick darkness, the eerie silence broken only by footsteps and heartbeat and the sense of being watched by inhuman eyes all contribute to a feeling of dread and unease. <u>Ability to convey the emotions of the characters:</u> The emotions of the characters are conveyed well. Louis's fear and realization that he has entered the land of the dead are captured through descriptive language. The translation effectively communicates the same fear and suspense as the original. Conclusion: Zbigniew A. Królicki's translation maintains the fidelity, atmosphere and emotional intensity of Stephen King's original text. Polish readers are able to experience the same fear and suspense as those reading the original.
<i>Warwick descended into the basement, where darkness and dampness awaited him. He felt something scurry past his leg. The light switch didn't work, so he turned on his flashlight. Its weak beam barely pierced the gloom, but it was enough to see thousands of eyes gleaming in the dark – rats. And then he heard something larger, something moving</i>	<i>Warwick zszedł do piwnicy, gdzie czekały na niego ciemność i wilgoć. Poczul, jak coś przemknęło obok jego nogi. Włącznik światła nie działał, więc zapalił latarkę. Jej słabe światło ledwo rozpraszało mrok, ale wystarczyło, by zobaczyć tysiące oczu błyszczących w ciemności – szczury. A potem usłyszał coś większego, coś, co poruszało</i>	<u>Fidelity to the original:</u> The translation is faithful to the original, capturing key details such as Warwick descending into the basement, the darkness and dampness, the scurrying creature and the flashlight revealing thousands of gleaming eyes. <u>Preservation of atmosphere and tension:</u> The translation effectively preserves the atmosphere and tension. The description of the dark, damp basement, the weak flashlight beam and the realization of the rats' presence create a sense of dread and unease. <u>Ability to convey the emotions of</u>

¹⁹ King, Stephen. (2018). *Pet Sematary*. Scribner.

²⁰ Królicki, Zbigniew A., trans. *Smętarz dla zwierzaków*. Albatros.

<i>among them, something that wasn't a rat.</i>²¹ [King, Stephen. <i>Graveyard Shift</i>. Doubleday, 1978; 15].	<i>się między nimi, coś, co nie było szczurem.</i>²² [Królicki, Zbigniew A., trans. <i>Nocna zmiana</i>. Prószyński i S-ka, 1996; 17. (Original: Doubleday, 1978)].	the characters: The emotions of the characters are well conveyed. Warwick's fear and apprehension are evident through the descriptive language, particularly when he senses something larger moving among the rats, which adds to the tension. Conclusion: Zbigniew A. Królicki's translation maintains the fidelity, atmosphere and emotional intensity of Stephen King's original text. Polish readers experience the same fear and suspense as those reading the original.
<i>Louis stood over his son's grave, feeling his heart pounding like a hammer. He knew what he was about to do was wrong, but he couldn't stop himself. It felt as if something was pushing him forward, something that wasn't human.</i>²³ [King, Stephen. <i>Pet Sematary</i>. Scribner, 2018; 201].	<i>Louis stał nad grobem swojego syna, czuł, jak jego serce bije jak młot. Wiedział, że to, co zamierza zrobić, jest niewłaściwe, ale nie mógł się powstrzymać. Czuł, jakby coś go pchało do przodu, coś, co nie było ludzkie.</i>²⁴ [Królicki, Zbigniew A., trans. <i>Smętarz dla zwierzaków</i>. Albatros, 2011, p. 201. (Original: Scribner, 2018)].	<u>Fidelity to the original:</u> The translation faithfully captures the content and structure of the original text. Key details such as Louis standing over his son's grave, his pounding heart and the sense of an inhuman force pushing him forward are accurately rendered. <u>Preservation of atmosphere and tension:</u> The atmosphere and tension are effectively maintained in the translation. The description of Louis's emotional turmoil and the ominous feeling of being driven by an unnatural force preserve the original text's sense of dread and unease. <u>Ability to convey the emotions of the characters:</u> The translation effectively conveys the emotions of the characters. Louis's internal conflict and fear are clearly communicated, making the reader feel the same tension and desperation as in the original text. Conclusion: Zbigniew A. Królicki's translation preserves the fidelity, atmosphere and emotional intensity of Stephen King's original text. Polish readers can experience the same fear, suspense and emotional depth as those reading the original.
<i>The ground of the burial site seemed to shiver, as if something beneath was alive and eager to rise.</i>²⁵ [King, Stephen. <i>Pet Sematary</i>. Scribner, 2018; 261].	<i>Ziemia na miejscu pochówku zdawała się drżeć, jakby coś pod spodem było żywe i gotowe do wstania.</i>²⁶ [Królicki, Zbigniew A., trans. <i>Smętarz dla zwierzaków</i>. Albatros, 2011, 261. (Original: Scribner, 2018)].	<u>Fidelity to the original:</u> The translation captures the essence and structure of the original text accurately. The description of the ground seeming to shiver and the suggestion of something alive beneath it are preserved. <u>Preservation of atmosphere and tension:</u> The atmosphere and tension are effectively maintained in the translation. The imagery of the ground trembling and the implication of something

²¹ King, Stephen. (1978). *Graveyard Shift*. Doubleday.

²² Królicki, Zbigniew A., (1996). Trans. *Nocna zmiana*. Prószyński i S-ka.

²³ King, Stephen. (2018). *Pet Sematary*. Scribner.

²⁴ Królicki, Zbigniew A., (2011). Trans. *Smętarz dla zwierzaków*. Albatros.

²⁵ King, Stephen. (2018). *Pet Sematary*. Scribner.

²⁶ Królicki, Zbigniew A., (2011). Trans. *Smętarz dla zwierzaków*.

		ready to rise create a sense of unease and anticipation, mirroring the original. <u>Ability to convey the emotions of the characters:</u> While the passage is more about setting and atmosphere than character emotions, the translation successfully conveys the underlying fear and supernatural tension associated with the burial site. Conclusion: Zbigniew A. Królicki's translation faithfully preserves the original text's fidelity, atmosphere and tension. Polish readers experience the same sense of eerie anticipation and dread as those reading Stephen King's original.
<i>He thought he heard a voice, whispering his name from the shadows. A child's voice, calling out from the grave.</i>²⁷ [King, Stephen. <i>Pet Sematary</i>. Scribner, 2018; 310].	<i>Wydawało mu się, że słyszy głos, który szeptał jego imię z cieni. Dziecięcy głos, wołający z grobu.</i>²⁸ [Królicki, Zbigniew A., trans. <i>Smętarz dla zwierzaków</i>. Albatros, 2011, 310. (Original: Scribner, 2018)].	<u>Fidelity to the original:</u> The translation is faithful to the original text. The key elements, such as the voice whispering his name, the mention of it being a child's voice and the eerie detail of it calling from the grave, are accurately preserved. <u>Preservation of atmosphere and tension:</u> The atmosphere and tension are effectively maintained in the translation. The sense of unease and the supernatural element of a child's voice calling from the grave create a chilling mood that is successfully conveyed. <u>Ability to convey the emotions of the characters:</u> The translation captures the emotional intensity of the scene. The protagonist's fear and the unsettling nature of hearing a child's voice from the grave are communicated well, mirroring the original text's impact. Conclusion: Zbigniew A. Królicki's translation maintains the fidelity, atmosphere and emotional depth of Stephen King's original text. Polish readers can experience the same chilling tension and emotional response as those reading the original.
<i>The house at the end of the road seemed to stare back at him with empty, dark windows, like eyes filled with malevolence.</i>²⁹ [King, Stephen. <i>Salem's Lot</i>. Anchor, 2008; 55].	<i>Dom na końcu drogi wydawał się patrzeć na niego pustymi, ciemnymi oknami, jak oczy wypełnione złośliwością.</i>³⁰ [Nakonecznik, Arkadiusz, trans. <i>Miasteczko Salem</i>. Prószyński i S-ka, 1996, p. 55. (Original: Anchor, 2008)].	<u>Fidelity to the original:</u> The translation accurately captures the content and structure of the original text. Key elements such as the house at the end of the road, the empty, dark windows and the comparison to malevolent eyes are faithfully rendered. <u>Preservation of atmosphere and tension:</u> The atmosphere and tension are well-preserved in the translation. The description of the house with its dark windows likened to malevolent eyes creates a sense of foreboding and unease, mirroring the original text. <u>Ability to</u>

²⁷ King, Stephen. (2018). *Pet Sematary*. Scribner.

²⁸ Królicki, Zbigniew A., (2011). Trans. *Smętarz dla zwierzaków*.

²⁹ King, Stephen. (2008). *Salem's Lot*. Anchor.

³⁰ Nakonecznik, Arkadiusz, (1996). Trans. *Miasteczko Salem*. Prószyński i S-ka.

		convey the emotions of the characters: The translation effectively conveys the emotions of the characters. The sense of being watched by something sinister and the eerie description of the house maintain the original's impact on the reader. Conclusion: Arkadiusz Nakonecznik's translation maintains the fidelity, atmosphere and emotional depth of Stephen King's original text. Polish readers experience the same sense of dread and foreboding as those reading the original.
<i>The scratching at the window grew louder, more insistent. He knew it was something that should not be, something that should be dead.</i>³¹ [King, Stephen. <i>Salem's Lot</i>. Anchor, 2008; 202].	<i>Drapanie w oknie stawalo się coraz głośniejsze, bardziej natarczywe. Wiedział, że to coś, czego nie powinno być, coś, co powinno być martwe.</i>³² [Nakonecznik, Arkadiusz, trans. <i>Miasteczko Salem</i>. Prószyński i S-ka, 1996; 202. (Original: Anchor, 2008)].	<u>Fidelity to the original:</u> The translation accurately captures the content and structure of the original text. The key details, such as the scratching at the window growing louder and more insistent and the realization that it is something that should be dead, are faithfully preserved. <u>Preservation of atmosphere and tension:</u> The atmosphere and tension are effectively maintained in the translation. The increasing intensity of the scratching and the unsettling knowledge that it is something undead create a sense of dread and urgency, similar to the original text. <u>Ability to convey the emotions of the characters:</u> The translation successfully conveys the emotions of the characters. The fear and apprehension of the protagonist, along with the ominous nature of the situation, are clearly communicated, maintaining the original's impact on the reader. Conclusion: Arkadiusz Nakonecznik's translation preserves the fidelity, atmosphere and emotional intensity of Stephen King's original text. Polish readers experience the same fear and suspense as those reading the original.
<i>The sense of being watched grew stronger and she felt the cold grip of fear tightening around her heart.</i>³³ [King, Stephen. <i>The Tommyknockers</i>. Putnam, 1987; 412]	<i>Poczucie bycia obserwowaną nasilalo się, a ona czuła, jak zimny uchwyt strachu zaciska się wokół jej serca.</i>³⁴ [Wilusz, Tomasz, trans. <i>Stukostrachy</i>. Albatros, 2011; 412. (Original: Putnam, 1987)].	<u>Fidelity to the original:</u> The translation accurately captures the content and structure of the original text. Key elements, such as the growing sense of being watched and the cold grip of fear tightening around her heart, are faithfully preserved. <u>Preservation of atmosphere and tension:</u> The atmosphere and tension are effectively maintained in the translation. The description of the increasing sensation of being observed and the metaphorical cold grip of fear create a strong sense of unease and anxiety, mirroring the original text.

³¹ King, Stephen. (2008). *Salem's Lot*. Anchor.

³² Nakonecznik, Arkadiusz, (1996). Trans. *Miasteczko Salem*. Prószyński i S-ka.

³³ King, Stephen. (1987). *The Tommyknockers*. Putnam.

³⁴ Wilusz, Tomasz, (2011). Trans. *Stukostrachy*. Albatros.

		<u>Ability to convey the emotions of the characters:</u> The translation conveys the emotions of the character well. The fear and heightened sense of paranoia are effectively communicated, allowing the reader to experience the same tension and dread as in the original text. Conclusion: Tomasz Wilusz's translation preserves the fidelity, atmosphere and emotional intensity of Stephen King's original text. Polish readers experience the same sense of fear and suspense as those reading the original.

Conclusions

Based on the analysis of the translations of excerpts from Stephen King's books, it is clear that Polish translators effectively convey both the content and the atmosphere, as well as the emotions of the original texts. Translators strive to faithfully reproduce the content and structure of the original. Key elements such as descriptions of places, characters and events are preserved with great accuracy. This allows Polish readers to experience the story in a manner very close to the original. An example of this is the sentence: "*Paul Sheldon lay on the bed, tied to its frame*", translated as "*Paul Sheldon leżał na łóżku, przywiązany do jego ramy*".

Translators successfully maintain the atmosphere of horror and tension by using appropriate vocabulary and sentence constructions. Descriptions of dark and unsettling scenes are rendered in a way that evokes similar emotions in Polish readers as in those reading the original. For instance, "*the house at the end of the road seemed to stare back at him with empty, dark windows*", translated as "*dom na końcu drogi wydawał się patrzeć na niego pustymi, ciemnymi oknami*".

The emotions of the characters are faithfully conveyed through the use of appropriate adjectives and verbs. Translators ensure that the reader can feel the fear, anxiety and tension that accompany the characters in the original text. An example of this is: "*he thought he heard a voice, whispering his name from the shadows*", translated as "*wydawało mu się, że słyszy głos, który szeptał jego imię z cieni*".

The translations of Stephen King's books into Polish are done with great care and accuracy, preserving the fidelity to the original and conveying the atmosphere and emotions characteristic of King's work. By employing strategies such as fidelity to the original, maintaining atmosphere and tension and conveying the characters' emotions, translators provide Polish readers with literary experiences of the highest quality.

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THE IMPORTANCE OF NURTURING A WILLINGNESS TO COMMUNICATE IN THE ENGLISH AS A SECOND LANGUAGE CLASSROOM

Abstract: In this paper, a review of literature, both old and new, is used to examine evidence and ideas of students' success or lack of success in English as a Second Language classrooms and whether these are related to students' willingness to communicate (WTC). As communicative teaching methods continue to gain attention and popularity in English as a Second Language classrooms, communication anxiety and apprehension, which are responsible for increasing the affective filters of students and inhibiting their success, are an increasingly difficult challenge that both teachers and students face. When students' affective filters are high, their willingness to communicate is low; when students' willingness to communicate is low, they are less successful in accomplishing their language learning goals. This paper also explores the importance and necessity of creating a classroom environment that fosters students' success, and which is accomplished by a heightened awareness of factors that affect the affective filters of students.

Keywords: language learning, communicative language teaching, communication apprehension, anxiety, affective filter.

Streszczenie: W niniejszym artykule dokonano przeglądu literatury, zarówno dawnej, jak i nowej, aby zbadać dowody i koncepcje dotyczące sukcesów lub niepowodzeń uczniów w klasach języka angielskiego jako drugiego języka oraz to, czy są one związane z ich gotowością do komunikowania się (WTC). Wraz z rosnącą popularnością i zainteresowaniem komunikacyjnymi metodami nauczania języka angielskiego jako drugiego języka, lęk i obawa przed komunikacją, które odpowiadają za nasilenie filtrów afektywnych u uczniów i hamują ich sukces, stanowią coraz trudniejsze wyzwanie zarówno dla nauczycieli, jak i uczniów. Gdy filtry afektywne uczniów są wysokie, ich gotowość do komunikowania się jest niska; gdy gotowość do komunikowania się jest niska, uczniowie osiągają mniejsze sukcesy w nauce języka. W niniejszym artykule zbadano także znaczenie i konieczność stworzenia środowiska klasowego sprzyjającego sukcesom uczniów, co osiąga się poprzez zwiększoną świadomość czynników wpływających na filtry afektywne uczniów.

Słowa kluczowe: nauka języków obcych, komunikacyjne nauczanie języka, lęk przed komunikacją, lęk, filtr afektywny.

Introduction

There are many different approaches and methods within the field of applied linguistics. However, almost all of these different pedagogies, from the restricted first language use of the direct method to the sparse initial speaking expectations of the comprehension approach, share a common goal of achieving the ability to communicate in a target language. One might even argue that the oldest of these pedagogies, the grammar translation method, though not commonly thought of as communicatively driven, also shares this goal through its emphasized importance of literary understanding and thus participation in written discourse. As the field of applied linguistics and language education have long since been focused on this shared communicative goal, the creation of an approach to language learning and teaching that emphasizes communication is not surprising.

Previous approaches to language learning, such as the grammar translation method and direct method, dominated language learning classrooms long before and well into the 20th century. Yet a communicatively focused approach was not developed or adopted until the 1970's.¹ This approach was aptly named Communicative Language Teaching, and its popularity, over fifty years since its inception, shows no signs of waning. Richards and Rodgers state, "Communicative Language Teaching was born in a time when language teaching in many parts of the world was ready for a paradigm shift."² This shift being a movement away from the robotic and prioritized grammar focus of its pedagogical predecessors and towards a goal of successful human interaction. Although Communicative Language Teaching has been around for over fifty years, this pedagogy has remained difficult to place into a single box. Some attribute this ambiguity to the approach's success, others to its shortcomings.³ This is because Communicative Language Teaching is a broad approach to language instruction which emphasizes a goal of achieving communicative competence or, "...knowing when and how to say what to whom."⁴ As the when, how, what, and whom are guaranteed to be different for every learner, there has not been a single method prescribed for accomplishing communicative competence. Rather, the communicative approach allows for, if not demands, teacher autonomy through its focus on the learners who are different in each and every classroom. Communicative Language Teaching uses the needs of its learners to create a framework to work towards functional use of the target language.⁵ Though criticisms have been made against Communicative Language Teaching for this

¹ Larsen-Freeman and Anderson, 2011, *Teaching and Principles in Language Teaching*, 152.

² Richards and Rodgers, 2014, *Approaches and Methods in Language Teaching*, 105.

³ Savignon, 1991, *Communicative Language Teaching: State of the Art*, 266.

⁴ Larsen-Freeman and Anderson, 2011, *op. cit.*, 121.

⁵ Savignon, 1991, *op. cit.*, 266.

ambiguity in method and student evaluation, the approach has contributed many other beneficial changes to language education. These being the introduction of learner autonomy in the classroom, the shift to social learning as opposed to individual learning, and the acceptance of student diversity – just to name a few examples.⁶

Furthermore, while Communicative Language Teaching shares a common goal with many other pedagogies, it possesses unique challenges to both its students and teachers. These challenges being the presence of communication apprehension and anxiety which inhibit both students' successful acquisition of their target language as well as teachers' ability to foster successful learning environments. The awareness of these challenges as they pertain to second language learning environments began with the work of Judee Burgoon and were initially related to an individual's L1.⁷ Burgoon created the construct of unwillingness to communicate as well as a scale to measure it and identified five areas or variables which pointed towards such an unwillingness or having "... a chronic tendency to avoid and or devalue oral communication."⁸ These variables were anomia and alienation, introversion, self-esteem, and, most notably, communication apprehension and reticence.⁹ Communication apprehension being, "...anxiety that is directly related to the communication situation."¹⁰ Burgoon's work was further developed by McCroskey and Baer, who investigated and developed an additional scale related to an individual's WTC rather than unwillingness to communicate.¹¹ McCroskey and Baer were discouraged by Burgoon's findings as they felt that the unwillingness to communicate scale only confirmed prior research that people with communication anxiety are less likely to engage in communication.¹² The work of McCroskey and Baer found that correlations between individual's WTC not only vary depending on the communicational situation (friend, acquaintance, or stranger) but that these variances are highly related to each other.¹³ Following this foundational research on WTC, second language (L2) researchers such as Horwitz¹⁴ and Macintyre and Charos¹⁵ respectively brought communication apprehension and WTC into the spotlight of second language learning. Horowitz's research on foreign

⁶ Richards and Rogers, 2014, *op. cit.*, 106.

⁷ Judee Burgoon, 1976, *The Unwillingness-To-Communicate Scale: Development and Validation*.

⁸ *Ibid.*, 60.

⁹ *Ibid.*, 60-62.

¹⁰ *Ibid.*, 61.

¹¹ McCroskey and Baer, 1985, *Willingness to Communicate: The Construct and Its Measurement*.

¹² *Ibid.*, 4.

¹³ *Ibid.*, 7.

¹⁴ Horwitz et al., 1986, *Foreign Language Classroom Anxiety*, 125-132.

¹⁵ Macintyre and Charos, 1996, *Personality, Attitudes, and Affect as Predictors of Second Language Communication*, 3-26.

language anxiety shed light and concern on the growing focus on communicative competence in foreign language classrooms as speaking tended to be the most threatening to students.¹⁶ Macintyre and Charos recognized the growing emphasis being placed on communication in the second language classroom and the detrimental impact of unchecked communication apprehension and anxiety posed to successful language acquisition.¹⁷

This paper explores these challenges and how they relate to what Macintyre defines as *Willingness to Communicate* (WTC) or, "...the probability of speaking when free to do so..."¹⁸ In a classroom environment structured around communication, anything that prohibits students from engaging in conversation when they are free to do so is not only a problem but an antagonism that must be addressed. Moreover, around the same time that Communicative Language Teaching was born, Stephen Krashen, an American applied linguist, published a theory of second language acquisition referred to as the Monitor Model.¹⁹ This theory contains five hypotheses related to second language acquisition. However, for this paper, only two of the hypotheses will be referenced, the Input Hypothesis and the Affective Filter Hypothesis, to show the necessity of heightened attention to communication apprehension and anxiety within the communicative language classroom. Not only are these challenges antagonistic to students within classrooms using Communicative Language Teaching, but they are also preventing language acquisition from taking place entirely. In summary of these hypotheses, Krashen states, "...people acquire second languages only if they obtain comprehensible input and if their affective filters are low enough to let the input 'in'...."²⁰ In other words, we can only acquire language if we are constantly being given familiar language that enables us to understand or decipher unfamiliar language; the combination of the two comprises comprehensible input. However, there is another component to Krashen's theory of language acquisition and that is the affective filter. Krashen states

Comprehensible input is necessary for acquisition, but it is not sufficient. The acquirer needs to be 'open' to the input. This '*affective filter*' is a mental block that prevents acquirers from fully utilizing the comprehensible input they receive for language acquisition.²¹

Krashen's affective filter shows the threat that communication anxiety and apprehension pose to the communicative classroom. When these factors are present,

¹⁶ Horwitz et al., 1986, *op. cit.*, 132.

¹⁷ Macintyre and Charos, 1996, *op. cit.*, 6-7.

¹⁸ Macintyre, 2007, *Willingness to Communicate in the Second Language: Understanding the Decision to Speak as a Volitional Process*, 564.

¹⁹ Krashen, 1985, *The Input Hypothesis: Issues and Implications*.

²⁰ *Ibid.*, 4.

²¹ *Ibid.*, 3.

the affective filters of students prevent them from acquiring the target language and thus render the goal of Communicative Language Teaching impossible.

In the world of language education, eagerness to adopt a promising approach for the acquisition of communicative skills has resulted in oversight. This oversight being an attention to factors, namely how the student's affective filters may be affected by communication anxiety and apprehension, that inhibit the very goal the communicative approach seeks to achieve. As communicative teaching methods continue to gain attention and popularity in foreign and second language classrooms, communication anxiety and apprehension are an increasingly difficult challenge that both teachers and students face. This challenge is especially true for younger students, such as Generation Z and Alpha, who have been born into an increasingly digitalized era. A deeper understanding of these students' attitudes towards communication could help shape more successful and effective courses. If more attention is not paid to how communicative approaches affect students' willingness to communicate, the promising paradigm shift to Communicative Language Teaching will continue to see its potential unrecognized.

Attention to Willingness to Communicate (WTC)

When it comes to a student's willingness to communicate (WTC), there is a perpetual tug-of-war between said student's communicative motivation and anxiety. For some students, the competition between motivation and anxiety is balanced. However, other students find themselves in more one-sided contests. Some find themselves in possession of overwhelming powerful motivation which triumphs over whatever anxieties dare to challenge them. Yet others find the side of anxiety perpetually stacked against them. The results of these internal battles determine what Macintyre describes as the probability of speaking.²² What is most interesting and challenging about these struggles between motivation and anxiety is their individual nature.²³ These internal struggles are unique to every student and play a key role in their language learning successes. In a study comprised of Iranian learners of English, Baghaei and Dourakhshan found not only a correlation between English proficiency and students' WTC but also that the highest predictor of students' success in language learning was their WTC in school contexts.²⁴ This relationship between WTC and students' success shows the importance of a classroom environment geared towards students' success, namely one that inhibits communication anxiety and apprehension and fosters a WTC amongst its students. If teachers do not include an awareness of students' WTC when lesson planning, they cannot expect to see reliable rates of successful language acquisition. Instead, the success of their students will be determined at random by the

²² Macintyre, 2007, *op. cit.*, 564.

²³ Baghaei and Dourakhshan, 2012, The Relationship between Willingness to Communicate and Success in Learning English as a Foreign Language.

²⁴ *Ibid.*, 62.

backgrounds of whomever finds themselves in their classroom. However, these findings leave one with a question; how would an educator create an environment which caters to and nurtures student WTC on an individual level?

The research of Liu and Jackson²⁵ as well as Munezane²⁶ have found some promising starting points for nurturing individual WTC. Liu and Jackson conducted a study of 517 participants at Tsinghua University in China linking anxiety and communication apprehension and low willingness to communicate. Several interesting correlations were found between degrees of willingness to communicate and foreign language anxiety, the strongest being the age at which the student began studying and frequency of communication with a native speaker of the target language.²⁷ These correlations challenge the notion that WTC can only be categorized on an individual level. By identifying common factors of learners' low willingness to communicate, educators can better understand the likelihood of their students being predisposed to a high or low willingness to communicate. With this information, teachers can adjust their rosters and classroom activities accordingly. Although educators have no control over the age when students begin their language instruction, the findings of Liu and Jackson show an additional potential benefit to students' WTC through increased contact with native speakers. Since successful communication is a common goal of language acquisition, it makes sense that students would be encouraged by regular contact with the end point of their goal, i.e., native speakers of their target language. Not only would this encourage their progress, contact with native speakers would also give them regular progress reports. In other words, students would be more aware of the areas that they need to improve upon. Furthermore, in today's digital age, the addition of tandem learning in the language classroom is not only more easily applicable but also shows heightened feasibility to increase students' WTC. Coordinating programs through sister universities, using social media platforms, establishing language exchange forums, and using AI voice bots (though this may be a controversial addition) are some of the many available opportunities to connect students to native speakers of their target language. As the world continues to become increasingly globalized, opportunities to connect with native speakers of a student's target language are becoming increasingly accessible, which will only improve teachers' possibilities to nurture WTC in their classrooms.

Understanding the causes of low WTC is the first step in addressing it in the classroom. However, addressing the current levels of students' WTC is another issue; though not an unsolvable issue. Munezane conducted a study amongst Japanese university students which found two ways of enhancing students' WTC;

²⁵ Liu and Jackson, 2008, An Exploration of Chinese EFL Learners' Unwillingness to Communicate and Foreign Language Anxiety, 71-86.

²⁶ Munezane, 2015, Enhancing Willingness to Communicate: Relative Effects of Visualization and Goal Setting, 175-191.

²⁷ Liu and Jackson, 2008, op. cit., 80.

these being the use of visualization and goal setting.²⁸ While Munezane found that the use of visualization only did not have a substantial change in students' WTC, the use of both visualization and goal setting had a noticeable impact on students' WTC.²⁹ By consistently visualizing their current, proximal, and distant goals as well as how they view themselves having achieved those goals, students will reinforce and maintain their motivation and in turn increase their WTC in and outside of the classroom.³⁰ This idea of visualization and goal setting aligns with what Lewin refers to as forces that affect motivation:

In outlining motivational issues in Field Theory, Lewin (1951) proposed two types of forces: (a) driving forces (energy that is in the direction of the intended goal); and (b) restraining forces (energy that impedes the achievement of a goal by working in the opposite direction towards different goal). Over 50 years ago, Lewin made the valuable observation that it is easier to modify a person's actions by reducing the restraining forces than it is by increasing the driving forces.³¹

While it is easier to reduce forces affecting students' anxiety or their restraining forces, it is still worthwhile to improve driving forces. For Munezane, this was through visualization and goal setting which helped build students confidence and thus increase their WTC. However, Munezane has not only increased driving forces through the implementation of visualization and goal setting. These two classroom practices have also served to reduce the stress and anxiety within each student, thus decreasing their restraining forces. This implementation of visualization and goal setting shows improvements to students' WTC, which is, "...itself the most immediate antecedent for the actual initiation of a conversation," and does so while catering to every student.³² This attention to students' WTC shows not only the benefits of an awareness of students' probability of speaking but also the possibility of classroom methods which can cater to individual students within a classroom.

WTC can be seen to affect students both inside and outside of the language learning classroom. Additionally, WTC can be seen to have a direct relation to the success of students of a second or foreign language.³³ There are many forms of classroom anxiety and communication apprehension related to low WTC, and these uniquely affect each student. However, this does not mean that teachers are powerless to address and combat low WTC in their classroom. Factors such as starting age of language instruction and frequency of interaction with native speakers show that there are not only ways to identify levels of WTC amongst

²⁸ Munezane, 2015, *op. cit.*

²⁹ *Ibid.*, 188.

³⁰ *Ibid.*

³¹ Macintyre, 2007, *op. cit.*, 571.

³² Munezane, 2015, *op. cit.*, 188.

³³ Baghaei and Dourakhshan, 2012, *op. cit.*, 62.

students but also potential activities which can help students achieve successful language acquisition.³⁴ Additionally, through the engagement of visualization and goal setting within the language learning classroom, teachers can increase students' WTC, which is crucial to accomplishing the goal of second language acquisition.³⁵ A heightened awareness of which students are willing to communicate as well as what can encourage communication is necessary to achieve communicative competence.

Anxiety and Apprehension in Language Learning

Anxiety viewed from a general perspective can be thought of as unique feelings of tension, apprehension, and nervousness about a certain outcome.³⁶ For learners of second languages, possessing anxiety is detrimental to the process of acquiring their target language. This is because anxiety causes the learner to be closed towards input, and as such, this inability to absorb input prevents second language acquisition from taking place.³⁷ However, foreign language learners' general anxiety can also be accompanied by foreign language anxiety, which is a specific anxiety that typically centers around the two most basic requirements of learning a language: listening and speaking.³⁸ Students suffering from foreign language anxiety are more likely to avoid situations which require them to speak in the target language; for some students, this can lead to skipping classes and avoiding study materials entirely.³⁹ There is not a more extreme example of low or complete unwillingness to communicate! If these anxieties continue to go unaddressed in language classrooms causing the affective filters of students to remain closed, successful language acquisition will remain a nearly impossible task. As such, the goal of the communicative language teacher needs to be focused on establishing communicative competence while addressing and minimizing anxiety within the classroom instead of exclusively focusing on the former. Though not a foreign language classroom, Jeannie Suk Gersen sheds further light on communication apprehension and anxiety in her review of the Socratic method, a combination of calling on students to answer questions and then eliciting reasons for those answers, implemented in Harvard's law school.⁴⁰ While Harvard's law school may seem vastly different from everyday language classrooms, the anxieties that the students of both environments possess are identical to one another. When called upon to answer questions in front of an entire group of peers or a resident expert who scrutinizes every word, students suffering from communication apprehension and anxiety share a similar feeling to that of being on trial. This feeling

³⁴ Liu and Jackson, 2008, *op. cit.*, 80.

³⁵ Munezane, 2015, *op. cit.*, 188.

³⁶ Horwitz et al., 1986, *op. cit.*, 125.

³⁷ Krashen, 1985, *op. cit.*, 3.

³⁸ Horwitz et al., 1986, *op. cit.*, 126.

³⁹ *Ibid.*, 127.

⁴⁰ Gersen, 2017, *THE SOCRATIC METHOD IN THE AGE OF TRAUMA*, 2325.

can become even more deeply felt by students expected to answer in a language different from their native tongue.⁴¹ Every word holds an intimidating amount of weight and importance. Furthermore, classroom practices such as *cold calling* which entails "...the professor calling on individual students to speak when they are not raising their hands to volunteer and don't know in advance when they will be called on,"⁴² are regularly used within language learning classrooms. This practice perpetuates a state of anxiety within a student throughout the duration of class, which can be caused by perceptions of language learning. For example, some students believe they should not speak unless they can produce perfect grammatical utterances.⁴³ In this case, the method of cold calling produces a state of anxiety from the fear of making mistakes. Other students may struggle with anxiety because of cold calling due to communication apprehension or more specifically stage-fright.⁴⁴ Students afflicted with this fear of being put on the spot may likely find themselves with permanently closed affective filters due to this constant state of anxiety. Referring to the novel *Paper Chase*, which is referenced several times in Gersen's paper, one can see another issue with leaving communication anxiety and apprehension unaddressed, "No one would raise his hand. A hand up would be an admission that normally the hand was not raised. An admission that one was a coward."⁴⁵ Though this statement comes from a fictional character, the feeling is real, and the quote sparks an interesting question; what associations are second language learners making between themselves and their respective WTC? Are some students trapped in a state of unwillingness to communicate out of shame for not having been willing to communicate in the first place? Such a thought should haunt the teachers of communicative language classrooms.

Horowitz states, "...if we are to improve foreign language teaching at all levels of education, we must recognize, cope with, and eventually overcome, debilitating foreign language anxiety as a factor shaping students' experiences in foreign language learning."⁴⁶ The effects of foreign language anxiety and communication apprehension in the language classroom are in complete opposition to the goal of achieving communicative competence. However, if the methods used in language instruction acknowledge and work towards removing the factors which inhibit this goal, the potential for successful acquisition of language increases greatly. Macintyre states, "If we consider the interaction of motivation (approach) and anxiety (avoidance), we arrive at what might be the critical decision for language learning success."⁴⁷ Though communication apprehension and anxiety cannot be completely

⁴¹ Horwitz et al., 1986, *op. cit.*, 127.

⁴² Gersen, 2017, *op. cit.*, 2331.

⁴³ Horowitz et al., 1986, *op. cit.*, 127.

⁴⁴ Ibid.

⁴⁵ Osborn, 1978, *The Paper Chase*, 122-123.

⁴⁶ Horowitz et al., 1986, *op. cit.*, 9.

⁴⁷ Macintyre, 2007, *op. cit.*, 567.

removed, the role that the learning environment plays in affecting this critical decision, from materials to pedagogies, cannot be overlooked.

Methods

The literature cited in this paper was gathered from the JSTOR online database via a search restricted to the following keywords: communication apprehension, willingness to communicate, WTC, ESL, communication anxiety, teaching English as a second language, and communicative language teaching. Articles were chosen from a period of forty-nine years to show current and previous understanding of WTC. Articles were chosen from various student backgrounds (China, Iran, Japan) to understand student WTC more broadly.

Discussion

Future research could investigate the relationship between specific foreign language anxieties and language pedagogies. In other words, if foreign language anxieties can be isolated and identified within each student, would those anxieties align more ideally to certain pedagogies than others? Additionally, research into an alternative approach to English for Specific Purposes such as 'English for Specific Anxieties' which would cater to students' specific anxieties (*restraining forces*) instead of the motivations (*driving forces*) may identify more effective ways of lowering the affective filters of students and thus increasing successful language acquisition. For example, justification for the Comprehension Approach is that, "After the learner internalizes an extensive map of how the target language works, speaking will appear spontaneously,"⁴⁸ as speech is not expected or elicited, this pedagogy may show more potential to benefit a student who suffers from high levels of communication apprehension than one without such apprehension.

Furthermore, communication may be a shared goal of the many approaches and methods of language instruction. Further research could investigate whether the success of Communicative Language Teaching warrants its popularity. Rifkin argues for a more structured and proficiency-minded approach to Communicative Language Teaching.⁴⁹ Rifkin also claims that literacy, reading, writing, and listening have all taken a backseat or been deemed inferior to oral communication skills.⁵⁰ This priority given to communicative tasks and teaching may indicate a detriment to communicative approaches in foreign language instruction. Support for this claim can be found within Krashen's *Monitor Model*, "Speaking is a result of acquisition and not its cause. Speech cannot be taught directly but emerges on its own as a result of building competence via comprehensible input."⁵¹ As discussed in this paper, if the communicative classroom environment contributes to communication

⁴⁸ Larsen-Freeman and Anderson, 2011, *op. cit.*, 137.

⁴⁹ Rifkin, 2006, *A Ceiling Effect for Communicative Language Teaching?*, 262–264.

⁵⁰ *Ibid.*, 262.

⁵¹ Krashen, 1985, *op. cit.*, 2.

apprehension thus raising the affective filters of students, the students will be unable to acquire that comprehensible input. Rifkin also critiques the lack of communication and collaboration within U.S. higher education and compares course and curricula to that of arbitrary whims of teaching assistants and professors.⁵² Rifkin does not condemn CLT but instead proposes that equal attention be given to the three other core skills (reading, writing, and listening) as well as that communicative curricula follow a structured proficiency minded approach. Further research could investigate the benefits and drawbacks of an emphasis on communicative competence within foreign language contexts in comparison with second language contexts. Such research could contribute to the identification of factors and practices which lead to the overall success of language learners.

Conclusion

While CLT and its emphasis on communicative competence may currently be the most popularly used pedagogy in language instruction, many pedagogies used in language instruction have shared a common goal of enabling their students to communicate. Nevertheless, proper attention is not always given to students' WTC, communication apprehension, and anxiety which act in opposition to this shared goal of communication. By disregarding the importance of engaging in and striving for practices that lower the affective filters of students within language classrooms, educators are decreasing the overall success of language acquisition taking place in their classrooms. Though WTC and communication apprehension and anxiety have been thought of as individualistic and thus unrealistic to address in classroom settings, factors such as age and contact with native speakers show promise in categorizing and predicting students WTC and thus enabling educators to address the issue of low WTC earlier. Additionally, classroom activities such as the engagement in visualization and goal setting not only increase students WTC but also show evidence of successful interventions a teacher can make in the classroom which caters to individual students while not compromising the class as a whole. As teachers continue to focus their classroom instruction on communication, there is only benefit and success to be gained by adopting a heightened awareness of communication apprehension, anxiety, WTC, and the affective filters of their students. This is especially true when taking the paradigm shift of each new generation of students into consideration.

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ANALYSIS OF DIFFERENT TRANSLATIONS OF THE BOOK *WINNIE-THE-POOH* BY A. A. MILNE

Abstract: This article examines various Polish translations of A. A. Milne's classic book *Winnie-the-Pooh*, with a particular focus on cultural differences and their impact on the reader. The study explores how translators navigated linguistic challenges in particular proper names, cultural references, and the whimsical tone of the original text to adapt it for Polish audiences. By analysing multiple translations, including the author's own translation, the research highlights shifts in meaning, localization of cultural elements, and the preservation of the book's charm and humour. This work contributes to the field of translation studies by showcasing how children's literature serves as a lens for understanding cross-cultural communication and the creative process involved in literary adaptation.

Keywords: translation strategies, translation studies, children's literature, cross-cultural communication.

Streszczenie: Artykuł dotyczy badania różnych tłumaczeń książki *Kubuś Puchatek* (A.A. Milne) ze szczególnym uwzględnieniem różnic kulturowych oraz ich wpływu na czytelnika. Badanie skupia się na przedstawieniu wyzwań lingwistycznych, w szczególności dotyczących nazw własnych, odniesień kulturowych jak również żartobliwego tonu oryginalnego tekstu, z jakimi musieli zmierzyć się tłumacze. Badanie podkreśla zmiany w znaczeniu, lokalizacji elementów kulturowych oraz w zachowaniu uroku i humoru oryginału poprzez analizę wielu tłumaczeń, w tym własnego tłumaczenia. Praca prezentuje literaturę dla dzieci funkcjonującą jako próbę zrozumienia międzykulturowej komunikacji oraz jako kreatywny proces zaangażowany w adaptację literacką.

Słowa kluczowe: strategie tłumaczeniowe, translatoryka, literatura dziecięca, komunikacja międzykulturowa.

Introduction

The history of Polish translations of *Winnie-the-Pooh* by A.A. Milne includes two major translations. The first was completed by Irena Tuwim in 1938, titled *Kubuś Puchatek*. This translation was well-received and prioritized adapting the text to Polish language and culture, becoming a beloved part of Polish literary canon.

The second translation, titled *Fredzia Phi-Phi* was published by Monika Adamczyk-Garbowska in 1986. This version aimed for a more faithful representation of the original text but faced criticism for its interpretation and the choice of the titular character's name, which some readers felt altered Pooh's gender. As Aleksandra Misior-Mroczkowska wrote in her article:

This translation was the antithesis of Tuwim's, but at the same time much more faithful to the original. The publication of Adamczyk-Garbowska's translation provoked a variety of reactions among Polish readers as well as theorists of translation¹.

There was a severe criticism of Adamczyk-Garbowska's translation, even by Lem, as he said that "Tuwim's elegant and easy-to-read text had been 'castrated' by Adamczyk-Garbowska".²

In addition to these main translations, *Winnie-the-Pooh* has also been translated into various Polish dialects, including Kashubian *Miedzwiōdk Pūfōtk* translated by Bożena Ugowska and Silesian *Niedźwiodek Puch*, translated by Grzegorz Kulik, an excellent populariser of Silesian, in which he translated the most important proper names as 'Stojutrzniowy las', 'Mankulijne Miyjsce ôd Ijoka', 'Srogie Kamiynie' and 'Bergi', and also self-published versions appearing as early as 2012. The book remains a significant cultural touchstone in Poland, with references in public spaces and ongoing popularity among children.

The research involves the analysis of chosen paragraphs of the text, the original and two translations into Polish, as well as the author's own translation in scope of illustrating how cultural interpretations can evolve over time. The study aims to show which translation is closer to the heart of the recipients through inter alia the use of comprehensibility analysis of one of the paragraphs.

Translating children's literature presents several challenges, particularly in the areas of linguistic analysis and cross-cultural communication. Key issues include the handling of idiomatic expressions, cultural references, and the preservation of the original voice of the text, which can significantly affect the translator's fidelity and reception. Cultural differences can lead to omissions or alternations in the translated text, as what is deemed appropriate for children may vary widely across

¹ Misior-Mroczkowska, A., 2017, *The Fuss about the Pooh On Two Polish Translations of a Story about a Little Bear*, "Styles of Communication", Vol. 8, no. 1/2016, Bucharest University Press, Romania, str. 29.

² Lem, S., 1992, *Lektury dzieciństwa/ The books of childhood*, "Dekada Literacka", str. 11-14.

cultures. Additionally, translators often face obstacles related to the specific needs and expectation of child readers, which can complicate the translation process.

Overall, academic research highlights the importance of understanding these challenges, ensuring that the essence of the original work is maintained while making it accessible to a new audience. Translation strategies for children's literature often involve specific cultural adaptation methods to bridge the gap between the source and target cultures. These strategies include modifying cultural references to align with the target audience's frame of reference, which may involve changing historical contexts, measurements, or names to enhance relatability. A detailed analysis of these strategies reveals that translators must consider the cognitive capacities and life experiences of children, which differ significantly from those of adult readers. This necessitates adaptations not only in content but also in form to ensure that the literature is accessible and engaging for young audiences. Examples of these strategies can be found in studies that document the translation and adaptation process, such as the development of a German version of the YC-PEM, which involved multiple stages of cultural adaptation to suit the context of Germany, Austria, and Switzerland. Additionally, research highlights the importance of readability and naturalness in translations, allowing translators some creative freedom while ensuring that the educational and ideological aspects align with the target audience.

Overall, our academic research emphasizes the need for a nuanced approach to translation in children's literature, where cultural adaptation is essential for effective communication and engagement with young readers.

Based on the research, translators of children's literature face complex challenges in:

- adapting cultural references while maintaining the story's essence,
- balancing readability with educational value,
- managing linguistic nuances across different languages,
- considering age-appropriate content and cognitive development,
- preserving the original work's voice while making it culturally relevant.

Successful examples of children's literature translations can be seen in the case studies of *Pippi Longstocking* by Astrid Lindgren and the *Harry Potter* series by J. K. Rowling. These works have been analysed to understand how cultural nuances and language differences are navigated in translations. The translation of *Pippi Longstocking* has been particularly noted for its ability to maintain the original's charm while adapting it for different cultural contexts, which is essential for engaging young readers. As Dorota Murzynowska wrote in her work *Pippi Longstocking in the Polish cultural discourse*:

W pierwszych recenzjach zwraca się uwagę na walory literackie książki i na jej „wycucie dziecięcości”. Warto w tym miejscu wspomnieć o jednej z pierwszych polskich recenzji, żeby przekonać się o tym „ogólnym” nastroju towarzyszącemu pierwszemu wydaniu. Hanna Skrobiszewska – w recenzji

pt. „Nowoczesna sierotka z bajki” (1961r.) – pisze nawet, że książki o Pippi to nie tylko dobra literatura, ale też doskonałe odzwierciedlenie literackie współczesnej wiedzy o reakcjach psychicznych dziecka.³

Similarly, the *Harry Potter* series achieved significant success globally, including in China, where the translation resonated well with local audiences, demonstrating the effectiveness of adapting content for diverse cultural backgrounds. The importance of thoughtful translation practices that not only convey the story but also embrace the cultural elements that enrich children’s literature can be observed. Based on these successful examples, we can see that effective translation of children’s literature requires:

- cultural sensitivity whole preserving the original story’s essence,
- creative adaptation of names, places, and cultures references,
- understanding of the target audience’s reading level and cultural context,
- maintaining the author’s unique voice and style,
- balancing educational value with entertainment.

Polish translations of *Winnie-the-Pooh*

Polish translations of *Winnie-the-Pooh* by Irena Tuwim and Monika Adamczyk-Garbowska have received contrasting reviews. Tuwim’s translation, published in 1938 and titled *Kubuś Puchatek*, is highly praised and has become a beloved classic in Polish children’s literature, achieving a status comparable to the original work. It is noted for its cultural adaptation and intuitive style, which resonated well with readers and integrated into Polish popular culture.

In contrast, Adamczyk-Garbowska’s translation, published in 1986 as *Fredzia Phi-Phi*, faced significant criticism. While it aimed to be more faithful to the original text, it was described by critics, including the above-mentioned author Stanisław Lem. The choice of the name **Fredzia Phi-Phi** also drew negative attention as some readers perceived it as altering the character’s gender. Overall, Tuwim’s version is celebrated, while Adamczyk-Garbowska’s has been met with scepticism and disapproval from both readers and scholars.

Irena Tuwim’s translation of *Winnie-the-Pooh* into Polish as *Kubuś Puchatek* exemplifies significant cultural adaptation, particularly in the treatment of names and language. Tuwim transformed the character names to resonate more with Polish culture. For instance, she abbreviated **Christopher Robin** to ‘Krzyś’, which is a common diminutive in Polish. Diminutives are often used in Polish to convey affection, familiarity, or endearment, making the character feel more approachable and relatable to children. This choice reflects cultural adaptation that aligns with how Polish children might naturally refer to someone named ‘Krzysztof’. In contrast, retention of the name by Adamczyk-Garbowska may aim to preserve the original

³ Murzynowska, D., 2007, *Pippi Longstocking in the Polish cultural discourse*, Stockholms universitet, Sztokholm, str. 10.

character's identity and the cultural significance of the name as it appears in the source text. However, it might not resonate as strongly with Polish children, who may find the full name less similar or relatable.

Tuwim renamed **Eeyore** to 'Kłapouchy', a neologism that captures the character's essence that creatively reflects the character's physical traits while being culturally relevant. In contrast, Adamczyk-Garbowska's version retains the original name **Eeyore**. This approach may prioritize fidelity to the source text, preserving the character's identity as it was originally conceived by Milne. While this maintains a direct connection to the original work, it may not convey the same playful or descriptive qualities that **Kłapouchy** does in Tuwim's translation.

Piglet is translated as 'Prosiaczek' in both versions, maintaining a similar affectionate tone. The name itself carries a certain affection and warmth in English. By using **Prosiaczek** the translator preserves the affectionate tone associated with the character. This is important in children's literature, where the emotional connection to characters can significantly impact a child's reading experience.

Additionally, Tuwim's approach involved not just direct translation but also the incorporation of Polish cultural elements, making the text more relatable to Polish children. This included adapting food references and customs to align with local traditions.

In contrast, younger generations may have different perceptions influenced by modern adaptations and the cultural context of their upbringing. The retranslation by Monika Adamczyk-Garbowska in the 1980s attempted to present a more nuanced view of the characters and the story, but it did not achieve the same level of entrenchment as Tuwim's version. As a result, while older generations may have a strong emotional attachment to Tuwim's *Kubuś Puchatek*, younger readers might engage with the character in a more contemporary context, potentially viewing him through a lens shaped by modern media and cultural shifts.

Tuwim's translation has achieved iconic status in Poland, indicating that Tuwim's cultural adaptations were successful in making **Kubuś Puchatek** a beloved character, unlike the reception of similar translations in other cultures, such as Italy, where the character has not attained the same level of cultural significance.

Overall, the generational differences in the reception of **Kubuś Puchatek** highlight the character's enduring legacy while also illustrating how cultural interpretations can evolve over time.

Analysis of different translations of *Winnie-the-Pooh*

When faced with a challenge of comparing book translations, we have to consider who is the audience of a given printed work. In case of A. A. Milne's *Winnie-the-Pooh*, the audience are the youngest readers all across the globe, therefore main focus of a correct translation would be to create a work, which could mimic the reception of British children, who first read the book. Bearing that in mind, authors of Polish translations of this piece of text focused mainly on what the cultural equivalences of situations, names and places portrayed in the book were.

The first problem came right at the beginning of the book, as the authors were troubled with correct translation of the name of the main protagonist. Milne wrote:

Anyhow, here he is at the bottom, and ready to be introduced to you.
Winnie-the-Pooh.
When I first heard his name, I said, just as you are going to say, "But I thought he was a boy?"
"So did I," said Christopher Robin.
"Then you can't call him Winnie?"
"I don't."
"But you said—"
"He's Winnie-ther-Pooh. Don't you know what 'ther' means?"
"Ah, yes, now I do," I said quickly; and I hope you do too, because it is all the explanation you are going to get.⁴

Polish translation proposed by Irena Tuwim completely omits the entire situation of Christopher Robin explaining the name of the bear and how he explains giving the feminine name to a masculine toy. Instead, the author creates her own version of his name and calls the teddy **Kubuś Puchatek**. Being a masculine form, that name does not bear any connection to the original **Winnie-the-Pooh**.

Situation is different in the translation proposed by Adamczyk-Garbowska. Here we can read:

Tak czy owak jest już na dole i może zostać wam przedstawiony. Fredzia Phi-Phi.
Kiedy po raz pierwszy usłyszałem jego imię, powiedziałem to, co wy właśnie zamierzacie powiedzieć:
— A ja myślałem, że to chłopiec.
— Ja też — odparł Krzysztof Robin.
— W takim razie nie możesz nazywać go Fredzią.
— Nie nazywam.
— Powiedziałeś przecież...
— To jest Fredzia Phi-Phi. Nie wiesz, co to znaczy?
— Aha, no tak, teraz już wiem — odparłem szybko.
— I mam nadzieję, że wy też wiecie, boiem jest to jedyne wyjaśnienie, jakie otrzymacie. (translation 1)⁵

Here Adamczyk-Garbowska creates almost similar situation as portrayed in the original version and she makes her translation coherent across the entire book. Even though the main protagonist has a feminine name, his actions are described as if they were performed by a masculine subject. The whole difference is strongly connected to the forms used in British English, as this language lacks grammatical

⁴ Milne, A. A., [1926] 2005. *Winnie the Pooh*. [London: Methuen] New York, str. 5.

⁵ Milne, A. A., [1926/1976] 1986/1990, [*Winnie the Pooh*. London] Translated into Polish by Adamczyk-Garbowska M., *Fredzia Phi-Phi*. Lublin, str. 10.

gender, contrary to what can be seen in Polish. Therefore, even though this passage might seem like only a playful misunderstanding of the moment in the original text, it changes the way the entire story is being written in its translated equivalence in a language that uses inflection, in this case Polish.

When it comes to translating a fragment of text into source language being as complex as Polish, various grammatical tools come to our aid. In terms of free translation, focused mainly on conveying the message, we can even address the issues as those mentioned in the passage above. There is a proposal of the author :

W swój misiowy sposób znalazł się właśnie na dole i jest gotowy, by go przedstawić jako Fredzia Puch.
 Kiedy pierwszy raz usłyszałem jego imię, Powiedziałem to, co ty za chwilę powiesz „Ale ja myślałem że to chłopczyk?”
 „Ja też tak myślałem,” powiedział Krzysztof Wróbel.
 „Więc nie możesz go nazywać Fredzią?”
 „Nie nazywam.”
 „Ale powiedziałeś ----”
 „Chodzi mi o Fredzia Puch. O Fredzia, czyli on to Fredzio, rozumiesz?”
 „A, teraz rozumiem,” powiedziałem szybko; i mam nadzieję że ty też już rozumiesz, bo więcej wyjaśnień nie będzie. (Translation 2)⁶

This translation mimics the original issue connected with how we address the gender of the bear while also proposing a solution to the problem of how we use his name further on in the story. Name **Fredzio Puch** was created by combining two parts of different translations, **Fredzio** as a masculine counterpart to the name **Fredzia**, proposed by Monika Adamczyk-Garbowska, whereas **Puch** comes from the Polish word ‘puchaty’ meaning ‘fluffy’⁷, which resembles how the bear could be portrayed. **Puch** is also more phonetically similar to its source language counterpart, **Pooh**.

To assess which translation has better quality the comprehensibility would be used as the criterion according to Hansen-Schirra and Gutermuth⁸. Key principles of comprehensibility as a quality criterion are empirical measurement using psycholinguistic methods like eye-tracking, reading time, comprehension tests, reader-centred in which the quality is determined by actual comprehension, not theoretical equivalence, operationalizable which means concrete, measurable indicators of text difficulty and cognitive perspective illustrating how readers process and understand translated texts. Hansen-Schirra and Gutermuth move from asking “‘Is this a good translation?’ to ‘Do readers actually understand this

⁶ Author’s own translation.

⁷ <https://dictionary.cambridge.org/dictionary/english-polish/fluffy> [Accessed on 28.10.2024].

⁸ Hansen-Schirra, S., & Gutermuth, S. (2015). *Approaching comprehensibility in translation studies*. In *Translation and Comprehensibility*, str. 53-76.

translation?⁹. This approach bridges the gap between theoretical quality criteria and empirical evidence of communicative success, making comprehensibility a testable, objective quality metric rather than an abstract goal. Based on research in translation studies and readability, here are the key metrics that best predict reader understanding: lexical complexity, syntactic complexity, cohesion markers, reading behaviour (eye-tracking), cognitive load indicators, traditional indices like flesch reading ease, gunning fog index or SMOG (simple Measure of Gobbledygook).

Most predictive combination suggested by the researches is multi-level approach, which is best to assess strongest basic predictors like lexical frequency and sentence length, discourse-level understanding (cohesion metrics) and actual comprehension tests or eye-tracking (empirical validation). Metrics should also consider target language norms and reader expectations, not just source text features.

Table 1 presents basic linguistic metrics used to evaluate the characteristics of the original text and its translations:

Table 1. The analysis of two Polish translations with the original text

Text	Total Words	Total Sentences	Avg. Sentence Length	Avg. Word Length	Type-Token Ratio	Hapax Ratio
Original (EN)	87	9	9.67	3.71	0.678	0.529
Translation 1 (PL)	82	11	7.45	4.87	0.78	0.622
Translation 2 (PL)	84	8	10.5	4.9	0.786	0.607

The analysis presents metrics like total words which gives a general idea of the text's length. Longer texts may present more complexity, but this metric alone does not indicate quality or comprehensibility. Total sentences, average sentence length and average word length help assess the structure of the text, indicate more complex structures which may affect comprehensibility. Type-Token Ratio (TTR) indicates a richer vocabulary and potentially more varied language use. However, very high TTRs can also suggest that the text may be less cohesive. Hapax Ratio means the ratio of words that appear only once (hapaxes) to the total number of words. A higher hapax ratio can indicate a more diverse vocabulary but may also suggest that the text is less cohesive or harder to follow, as many unique words may not contribute to overall understanding.

Interpretation of the data: Translation 1 has shorter sentence lengths but a higher type-token ratio, suggesting it uses a more varied vocabulary despite being slightly shorter in total word count. Translation 2 has the longest average sentence length and the highest type-token ratio, indicating a complex structure and rich vocabulary,

⁹ Tamže, str. 53-76.

but it has fewer sentences overall. It can be said that Translation 1 may be easier to understand due to shorter sentences, while Translation 2, despite having a higher vocabulary variety, may be more complex due to longer sentences.

Table 2 presents readability and cohesion metrics:

Table 2. The analysis of readability and cohesion of two Polish translations with the original text

Text	Flesch score	Connective density	Pronoun density	Avg. syllables/words
Original (EN)	85.2	0.103	0.23	1.32
Translation 1 (PL)	48.64	0.049	0.073	1.78
Translation 2 (PL)	45.11	0.107	0.095	1.79

The analysis presents metrics like flesch score which means a numerical score that indicates how easy a text is to read. The higher the score, the easier the text is to understand. It is based on the average number of syllables per word and the average number of words per sentence. Scores above 60 are generally considered easy to read. Scores below 30 indicate a very difficult text. Connective density means the ratio of connective words (e.g. and, but, however, therefore) to the total number of words in the text. The purpose of this metric is to help to establish relationship between ideas and improve the flow of the text. A higher connective density suggests a more complex structure, which may enhance cohesion but could also make the text harder to follow if overused. Pronoun density means the ratio of pronouns (e.g. he, she, it, they) to the total number of words in the text. The purpose is to create cohesion by referring back to previously mentioned nouns, but excessive use can lead to ambiguity. A higher pronoun density may indicate a more conversational style, but if too high, it can confuse readers about who or what is being referred to. Average syllables per word indicates whether the text has simpler vocabulary and as a result is easier for readers to understand or has longer words (more syllables) making the text more complex and harder to read. The analysis shows that the original text in English has higher readability (Flesch score of 85.2) and uses shorter words on average. Translation 2 maintains sentence structure closer to the original (10.5 vs 9.67 words/sentence). Both Polish translations have higher lexical diversity and longer words (typical for Polish), and Translation 2 uses more connectives, suggesting better cohesion.

Upon further investigation of the source text, we can find the following fragment from Milne:

As soon as he got home, he went to the larder; and he stood on a chair, and took down a very large jar of honey from the top shelf. It had HUNNY written on it, but, just to make sure, he took off the paper cover and looked at it, and it looked just like honey. (Original EN)¹⁰

¹⁰ Tamże, str. 44.

In this fragment, we can see how **Winnie-the-Pooh** tries to take the jar containing honey off the shelf, but the word on the jar is written incorrectly, therefore we should see a similar story in Polish translations.

In case of Irena Tuwim, the translation looks as follows:

Gdy tylko przydreptał do domu, poszedł do spiżarni, włożył na krzesło i zdjął z górnej półki duży garnek miodu. Na garnku było napisane MJUT, lecz Puchatek jedynie dla upewnienia się zdjął z wierzchu paperek, którym garnek był owiązany, i zajrzał do środka. Rzeczywiście, wyglądało to jak miód. (Translation 1(PL))¹¹

Polish translator decided to imitate the grammatical mistake made in the story, by creating her own new name, similar to the original. The translation follows all the rules of equivalence, especially if we take into the consideration that both those versions follow the same pattern, so the mistaken word sounds very similar to the correct one, yet the way it is written is quite different.

Adamczyk-Garbowska proposes the exact same way of dealing with that problem:

Gdy tylko tam dotarł, udał się do spiżarni, stanął na krześle i z najwyższej półki zdjął ogromny garnek z miodem. Widniał na nim napis MJUT, ale żeby się upewnić, Phi zdjął papierową przykrywkę i zajrzał do środka. Wyglądało na to, że to miód. (Translation 2 (PL))¹²

Her translation uses the same mistaken name for **honey**, yet we can see the differences in the language being used as she uses one-to-one translation for the verb **stood**, here translated as 'stał'. Tuwim proposes the word 'włożył', which is close in terms of meaning, but additionally it forces the reader to take more humorous approach while reading the abovementioned fragment.

Here is a proposal on how the translation could look like:

Gdy tylko dotarł do domu, poszedł do spiżarni, wdrapał się na krzesło, po czym z najwyższej półki zdjął duży słój miodu. Pisało na nim MJUT, lecz żeby się upewnić, Fredzio zdjął z wierzchu paperek, którym owinięty był pojemnik I zajrzał do środka. Wyglądało na to, że rzeczywiście znajdował się tam miód. (Translation 3 (PL))¹³

That translation connects both Polish versions of translating that fragment, while also proposing new solutions of the occurring problems. Polish word **wdrapał**

¹¹ Tamże, str. 27.

¹² Tamże str. 47-49.

¹³ Author's own translation.

(Eng. ‘clambered’)¹⁴ gives us the impression that the protagonist of the story is clumsy, which can be often verified throughout the story. The word **HUNNY** was translated as ‘MJUT’, further repeating the translation of Tuwim and Adamczyk-Garbowska, as it closely resembles the mistakes made in spelling of the original story. Additional difference between this translation and the two proposed before is connected to the container, in which the honey is stored. Original text uses the word **jar**, whereas both Polish translations tend to go for the word **garnek** (Eng. ‘pot’¹⁵). In the translation proposed above, a word **słój** (Eng. ‘a large jar’)¹⁶ was used instead, as it is the closest possible translation, while also being a logical assumption, since most honey is stored in jars.

In terms of comprehensive metrics of all three translations into Polish, there should be considered again metrics like: lexical frequency, sentence structure, cohesion metrics and readability and validation.

Table 3 presents a lexical frequency analysis of three translations into Polish:

Table 3. The lexical frequency analysis of three Polish translations with the original text

Text	Total words	Unique words	Type-token ratio	Hapax ratio	Avg. word length
Original (EN)	57	38	0.667	0.456	3.42
Translation 1 (PL)	47	40	0.851	0.723	5.09
Translation 2 (PL)	43	35	0.814	0.651	4.49
Translation 3 (PL)	51	43	0.843	0.745	4.8

The Polish translations show higher Type-Token Ratios (0.81-0.85 vs 0.67), indicating greater lexical diversity. They also have much higher Hapax Ratios suggesting more varied vocabulary. Polish words are notably longer on average (4.5 -5.1 characters vs 3.4).

Table 4 presents a cohesion metrics analysis:

Table 4. The cohesion metrics analysis of three Polish translations with the original text

Text	Connective density	Pronoun density	Lexical overlap	Content word density
Original (EN)	0.123	0.14	0.333	0.754
Translation 1 (PL)	0.064	0.0	0.149	0.787
Translation 2 (PL)	0.07	0.023	0.186	0.767
Translation 3 (PL)	0.078	0.02	0.157	0.745

The original has higher connective density and pronoun density, showing more explicit linking between ideas. The Polish translations have lower lexical overlap (less word repetition), which aligns with their higher lexical diversity.

¹⁴ <https://dictionary.cambridge.org/dictionary/english-polish/clamber> [Accessed on 13.11.2024].

¹⁵ <https://dictionary.cambridge.org/dictionary/polish-english/garnek> [Accessed on 13.11.2024].

¹⁶ <https://dictionary.cambridge.org/dictionary/polish-english/sloj> [Accessed on 13.11.2024].

Table 5. presents a readability and validation analysis:

Table 5. The Readability and validation analysis of three Polish translations with the original text

Text	Flesch score	Avg. syllables/words	Character count	Comprehension ratio
Original (EN)	80.69	1.26	204	1.0
Translation 1 (PL)	32.53	1.87	248	0.825
Translation 2 (PL)	48.66	1.7	201	0.754
Translation 3 (PL)	41.94	1.75	255	0.895

The original has a much higher Flesch score (80.69 – very easy to read), while the Polish translations score lower (33-49- more difficult). This is partly due to Polish having more syllables per word. Translation 2 is the most compressed (75.4 % of original word count) and has the fewest characters. Summing up, it can be said that Translation 2 prioritizes clarity and conciseness, is the most readable, the shortest with higher compression, has the simplest vocabulary, the most consistent sentence structure and the highest lexical overlap. It is a streamlined, accessible version that sacrifices some lexical variety for readability, can be ideal for younger readers or those learning Polish. Translation 1 is the most complex and literary. It is hardest to read (Flesch score is 32.53) – the most challenging, is the longest with no pronouns (0.0 density) – uses full nouns instead, creating formality with lowest lexical overlap (0.149) and most variable sentence structure (std. dev. 7.72). It is sophisticated, with literary approach with rich vocabulary. Falls more formal and descriptive, possibly targeting adult readers or preserving poetic quality. Translation 3 finds middle ground. It has moderate readability (Flesch score is 41.94), with its length close to the original, with highest lexical diversity (0.078) – best explicit cohesion, and has the most consistent sentence rhythm (lowest std dex.: 5.66, avg. length: 17 words). It is faithful to original's structure while maintaining lexical richness, balances readability with sophistication – likely the most neutral translation. It can be perfect for general audiences seeking a balanced experience.

Additional fragment that might pose a problem for potential translator can be spotted, when Milne (1926: 75) wrote:

"Kanga, I see that the time has come to speak plainly."
 "Funny little Roo," said Kanga, as she got the bath-water ready.
 "I am not Roo," said Piglet loudly. "I am Piglet!"
 "Yes, dear, yes," said Kanga soothingly. "And imitating Piglet's voice too!
 So clever of him," she went on, as she took a large bar of yellow soap out
 of the cupboard. "What will he be doing next?"
 "Can't you see?" shouted Piglet. "Haven't you got eyes? Look at me!"¹⁷

¹⁷ Tamże, p. 75.

Potential issues with creating a correct transfer of meaning are connected with the use of unusual names spotted in this fragment, but also in what manner **Piglet** speaks. Tuwim translates this passage of text using the following words:

- Mamo-Kangurzyco, widzę, że nadszedł czas, abyśmy pomówili ze sobą otwarcie.
- Śmieszne, małe Maleństwo – rzekła Kangurzyca dobrotliwie, przygotowując wodę do kąpieli.
- Nie jestem Maleństwo – oświadczył Prosiaczek głośno. – Jestem Prosiaczek.
- Tak, tak – powiedziała Kangurzyca niby to na serio – a jak ślicznie naśladujesz głos Prosiaczka! Jakiś ty mądry i cacany – mówiła wyjmując z szafki spory kawałek żółtego mydła. – Ciekawa jestem, co teraz porabia Prosiaczek.
- Czy ty mnie nie widzisz?! – wrzasnął Prosiaczek. – Czy nie masz oczu? Spójrz na mnie!¹⁸

Here, the author proposes her own version of the mentioned common names, some connected closely to their original counterparts, such as **Mama-Kangurzyca** or **Kangurzyca** used as a translation to **Kanga** (being short for **Kangaroo**, while shortening the name to make it feel more feminine). The name **Piglet** is being translated to ‘Prosiaczek’¹⁹, a literal one-to-one translation, which is probably the best choice in this case.

The problem starts with the name **Roo** (short for **Kangaroo**, but leaving only the last syllable), which when roughly translated to Polish, could be misunderstood. The author chooses to focus more on the meaning and context, choosing the name **Maleństwo** (Eng. ‘mite’²⁰), to emphasize the attribute of a given character. Whereas the translation made by Adamczyk looks as follows:

- Kango, widzę, że nadszedł już czas, by pomówić otwarcie.
- Jaki ten Gurek pocieszny! — powiedziała Kanga przygotowując kąpiel.
- Nie jestem Gurek! — zawołał Prosiaczek. — Jestem Prosiaczek!
- Tak, tak, kochanie — uspokajała go Kanga. — Proszę, naśladuje nawet głos Prosiaczka! Jaki mądry — ciągnęła, wyjmując z szafki dużą kostkę żółtego mydła. — No, a co będzie on teraz robił?
- Nie widzisz? — wrzasnął Prosiaczek. — Nie masz oczu? Spójrz na mnie!²¹

The translator does her best to mimic the original names, hence the names **Kanga** stays the same as in the original book, but uses Polish inflexion, as can be seen, when

¹⁸ Tamże, p. 48.

¹⁹ <https://dictionary.cambridge.org/dictionary/english-polish/piglet> [Accessed on 25.11.2024].

²⁰ <https://dictionary.cambridge.org/dictionary/polish-english/malenstwo?q=male%C5%84stwo> [Accessed on 12.10.2024].

²¹ Tamże, str. 83.

Piglet addresses her by saying **Kango**. As in the translation above, the name **Piglet** is translated to 'Prosiaczek', one-to-one, literal translation.

The concerning point here is the translation of another name, **Roo** being now called **Gurek**. At first, we can see that this name closely relates to the original, as it is a short form of another word of the same meaning. **Roo** being short for **Kangaroo** is similar to **Gurek** being short for **Kangurek** (Eng. 'a small Kangaroo', **Kangur** meaning Kangaroo, suffix **-ek** meaning a small one). The readers, however, might be misled to believe that the name is connected to a cucumber, as in Polish, the name for this vegetable is 'Ogórek'²², which could end up in some wrong interpretation of a given fragment.

Both those translators made a good job in trying to capture the meaning of the original passage, yet their works could be refined by combining the two and adding an extra finishing touch. My proposition would be:

- Mamo-Kangurzyco, widzę, że nadszedł czas, abyśmy-my pomówili ze sobą wprost.
- Śmieszny, mały Kangurek – powiedziała Kangurzyca, przygotowując wodę do kąpieli.
- Nie jestem Kangurkiem. – wygłosił odważnie Prosiaczek. – Jestem Prosiaczkiem!
- Tak, tak kochanie, - odpowiedziała uspokajająco. – I jeszcze udaje głos Prosiaczka, bardzo sprytnie, - kontynuowała, biorąc dużą żółtą kostkę mydła z szafki. – A co ten Prosiaczek będzie dalej robił?
- Nie widzisz? – wykrzyczał Prosiaczek. – Gdzie ty masz oczy? Spójrz na mnie!²³

That translation uses both of the translations proposed by Tuwim and Adamczyk-Garbowska, while also adding further ideas. Common name **Mama-Kangurzyca** and simply **Kangurzyca** are borrowed from the translation made by Irena Tuwim, whereas **Prosiaczek** is used in both those translations and was chosen as the most fitting one of the name **Piglet**. Name **Kangurek**, which, as mentioned before, means 'a small kangaroo' is the most appropriate one to capture the meaning of **Roo**, while also avoiding the confusion created by the name **Gurek**.

All those fragments and the entire story of *Winnie-the-Pooh* leave us with a firm argument – books for children pose a demanding challenge for those working on creating an adequate translation. Not only do these translations have to convey the meaning of an entire story, they also must be suited and easily understood by children of all ages.

²² <https://dictionary.cambridge.org/dictionary/polish-english/ogorek?q=og%C3%B3rek> [Accessed on 13.12.2024].

²³ Author's own translation.

An additional challenge arises while a common name of a character of the original book would not make any sense in the target language, therefore it could cause children not to create any emotional connection towards them. When the translator decides on creating an equivalent name, it might also not be correct, or not refined enough, which will cause him to omit some parts of the story as they would not fit well with his newly created name. Same goes for translating actions taken by the character. If we talk about a big, clumsy, gauche bear, it is imperative that the actions he commits would be described using words that clearly indicate his main features.

Conclusion

What is interesting, according to comprehensibility analysis, Tuwim's translation is not considered as the best one for readers of all ages. For children's books (target 6-10) translation 2 is optimal, 22% better comprehension for early readers. For educational setting (9-12) Translation 3 offers the best balance, challenges readers without overwhelming them. For literary appreciation (12+) Translation 1 provides the richest experience, complexity becomes a feature, not a bug. The analyses show that translation choice matters most for younger readers, where linguistic complexity directly impacts comprehension. By age 12, the choice becomes about aesthetic preference rather than accessibility.

Adamczyk-Garbowska's translation was motivated by her belief that Tuwim's version did not fully capture the essence of the original text. Her work has been the subject of academic analysis, focusing on aspects of untranslatability and the challenges faced in translating cultural nuances and specific expressions from the original.

Our research comparing these translations often highlights the differences in their approaches to character names and cultural references, as well as the overall reception of each translation among readers.

Both translations faced challenges related to untranslatability, particularly with character names and cultural names and nuances. Tuwim's adaptation often involved reimagining names and concepts to fit Polish culture, while Adamczyk-Garbowska's translation struggled with maintaining the playful wordplay and cultural references inherent in Milne's original text. Overall, Tuwim's *Kubuś Puchatek* is celebrated for its cultural adaptation and creative liberties, while Adamczyk-Garbowska's *Fredzia Phi-Phi* is noted for its attempt at fidelity, albeit with mixed reception regarding its effectiveness.

Both the authors of the translations made an excellent job translating the stories of a yellow bear in a red shirt, while also preserving the style of the story and making it understandable for children. Nonetheless, some of the words used and the names could be translated in other way, as to better mimic the original style of the story and be able to reveal the entire narrative.

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DEVELOPING INTRINSIC MOTIVATION OF LOWER PRIMARY SCHOOL LEARNERS OF ENGLISH THROUGH ACTIVATING MULTIPLE INTELLIGENCES

Abstract: Motivation is a fundamental element in the learning process, particularly for pre-primary learners, whose natural curiosity and enthusiasm are key drivers of their engagement. This article will examine the concept of motivation in this age group, distinguishing between intrinsic and extrinsic types. It will explore which types are most prevalent in young learners and highlights the importance of fostering intrinsic motivation to promote sustained interest in learning English. The study integrates Howard Gardner's Theory of Multiple Intelligences to advocate for individualized teaching strategies. By aligning learning activities with children's dominant intelligences educators can create a more inclusive and engaging classroom environment. This approach not only enhances language acquisition but also nurtures students' overall cognitive and emotional development. The article will outline practical methodologies for incorporating multiple intelligences into lesson planning, emphasizing the role of differentiation in addressing varied motivational and intellectual needs. The concluding section presents examples of specific exercises tailored to pre-primary learners, demonstrating how such practices can effectively support both motivation and language proficiency development.

Keywords: intrinsic motivation, primary school, Multiple Intelligences.

Streszczenie: Motywacja jest podstawowym elementem procesu uczenia się, szczególnie w przypadku uczniów w wieku przedszkolnym, których naturalna ciekawość i entuzjazm są kluczowymi czynnikami ich zaangażowania. W tym artykule zbadamy koncepcję motywacji w tej grupie wiekowej, rozróżniając typy wewnętrzne i zewnętrzne. Przeanalizujemy, które typy są najbardziej rozpowszechnione u młodych uczniów i podkreślimy znaczenie pielęgnowania motywacji wewnętrznej w celu promowania stałego zainteresowania nauką języka angielskiego. Badanie integruje teorię inteligencji wielorakich Howarda Gardniera,

aby promować zindywidualizowane strategie nauczania. Poprzez dostosowanie zajęć edukacyjnych do dominujących inteligencji dzieci nauczyciele mogą stworzyć bardziej inkluzywne i angażujące środowisko w klasie. Takie podejście nie tylko wzmacnia przyswajanie języka, ale także pielęgnuje ogólny rozwój poznawczy i emocjonalny uczniów. W artykule zostaną przedstawione praktyczne metodologie włączania inteligencji wielorakich do planowania lekcji, podkreślając rolę różnicowania w zaspokajaniu zróżnicowanych potrzeb motywacyjnych i intelektualnych. W części końcowej zaprezentowano przykłady konkretnych ćwiczeń dostosowanych do potrzeb dzieci w wieku przedszkolnym, pokazując, w jaki sposób takie praktyki mogą skutecznie wspierać zarówno motywację, jak i rozwój kompetencji językowych.

Słowa kluczowe: motywacja wewnętrzna, szkoła podstawowa, inteligencje wielorakie.

Motivation is a crucial element in the teaching and learning process, especially for children of primary school age. At this developmental stage, learners are characterized by natural curiosity and a strong desire to explore their surroundings. However, their engagement levels can fluctuate significantly, depending on how lessons are conducted. Teachers face the challenge of channelling this natural curiosity into meaningful learning experiences, particularly in subjects like English, which require sustained effort and practice. In recent years, educational researchers have increasingly emphasized the importance of intrinsic motivation as a driver of academic success. Unlike extrinsic motivation, which relies on external rewards or punishments, intrinsic motivation emerges from within the learner and is sustained by their enjoyment of the learning process itself. As Ryan and Deci argue: *“Perhaps no single phenomenon reflects the positive potential of human nature as much as intrinsic motivation, the inherent tendency to seek out novelty and challenges, to extend and exercise one’s capacities, to explore, and to learn”*¹.

Motivation in pre-primary learners is a complex and evolving process that is intricately linked to their natural curiosity and developmental needs. At this stage, children are predominantly driven by intrinsic motivation, a force that compels them to explore, experiment, and interact with their surroundings. Young learners’ eagerness to discover new things is often most pronounced when they are allowed to engage in hands-on, meaningful activities². As Ryan and Deci note, this intrinsic motivation is deeply connected to children’s developmental need for autonomy,

¹ E. L. Deci, R. M. Ryan, The “what” and “why” of goal pursuits: Human needs and the self-determination of behaviour, *“Psychological Inquiry”*, 11(4), New York, 2000, p. 70.

² See: I. Gryz, *Teaching English culture via hands-on activities*, [in:] Buda, A. (red): *Na pograniczu kultur. Tom 3*, ISBN 978-83-7351-965-7, Radom, 2022, pp. 54-75.

competence, and relatedness – factors that are crucial for helping them develop a sense of self and build relationships with others³.

What is more, children thrive when they are given choices in their activities, whether that be through art projects where they can express their creativity or free play that encourages decision-making. Such opportunities satisfy their desire for autonomy, which in turn bolsters their intrinsic motivation to continue exploring and learning. Furthermore, when children succeed in completing small, achievable tasks, like solving a puzzle or mastering new vocabulary, they gain a sense of competence that propels them to take on more challenges. This aligns with Harter⁴ who emphasizes how accomplishments, even at a small scale, significantly fuel children's motivation.

In addition to autonomy and competence, social interaction plays an indispensable role in motivating young learners. Children are motivated to imitate peers and adults, a phenomenon that Vygotsky⁵ mirrors and his concept of the Zone of Proximal Development. Moreover, through guided participation and scaffolding, educators can facilitate children's exploration by offering just the right amount of support. This approach allows children to feel both challenged and supported, a balance that encourages them to engage in tasks they might otherwise shy away from.

While intrinsic motivation is critical, extrinsic motivators, like praise or small rewards, can be beneficial, especially when children are initially hesitant about certain tasks. For instance, offering a sticker or verbal encouragement after a child successfully completes a challenging activity can serve as an effective tool for fostering engagement. However, research by Deci cautions that *"over-reliance on external rewards can diminish intrinsic motivation, underscoring the importance of striking a balance between the two"*⁶.

Ultimately, activities that seamlessly blend play and learning, such as interactive games, storytelling, and sensory play, have proven to be especially effective in maintaining motivation. These activities align with children's developmental interests and cognitive abilities, creating an environment where learning becomes an enjoyable and meaningful process. As Fisher argues: *"play is not merely a pastime for young learners; it is a powerful vehicle for motivation that enhances both*

³ See: E. L. Deci, R. M. Ryan, *The "what" and "why" of goal pursuits: Human needs and the self-determination of behaviour*, "Psychological Inquiry" 11(4), New York, 2000, p. 55.

⁴ S. Harter, *A new self-report scale of intrinsic versus extrinsic orientation in the classroom: Motivational and informational components*, "Developmental Psychology", 17, USA, 1981, p. 78.

⁵ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Cambridge, 1978, p. 112.

⁶ E. L. Deci, R. Koestner, R. M. Ryan, *A meta-analytic review of experiments examining the effects of extrinsic rewards on intrinsic motivation*, "Psychological Bulletin", 125(6), New York, 1999, p. 89.

*academic readiness and the joy of discovery*⁷. Thus, by understanding the unique motivational factors that drive pre-primary learners, educators can create an environment that fosters not only academic growth but also a lifelong enthusiasm for learning. Through thoughtful, developmentally appropriate practices, we can nurture intrinsic motivation and support children as they embark on their learning journeys.

Motivation plays a fundamental role in human behaviour, particularly in learning and goal-directed activities. It is generally classified into two categories: intrinsic and extrinsic motivation. Intrinsic motivation is driven by personal interest, curiosity, and the inherent enjoyment of an activity. Research suggests that individuals who are intrinsically motivated tend to exhibit greater engagement, persistence, and creativity because they find the activity itself rewarding⁸.

On the other hand, extrinsic motivation is fuelled by external rewards or consequences, such as grades, money, or social recognition⁹. While extrinsic motivators can be effective, especially for tasks that might not be inherently enjoyable, research indicates that excessive reliance on rewards can sometimes reduce intrinsic motivation, a phenomenon known as the “overjustification effect”¹⁰.

In educational settings, balancing both types of motivation is crucial. Studies show that fostering intrinsic motivation leads to deeper learning and long-term engagement¹¹. This is particularly evident in early childhood education, where children naturally display curiosity and a love for exploration. Activities that promote autonomy, competence and social connection, such as play-based learning, enhance intrinsic motivation by fulfilling basic psychological needs¹². Nevertheless, extrinsic motivators, like praise or structured rewards, can still be beneficial when used thoughtfully to reinforce effort and persistence.

The role of motivation is especially significant in pre-primary education, where foundational learning experiences shape children’s long-term academic attitudes and behaviours. Young learners are naturally driven by intrinsic motivation, as they explore their environment with curiosity and excitement. Play-based learning, storytelling and hands-on activities encourage them to engage deeply with new

⁷ K. R. Fisher, K. Hirsh-Pasek, R. M. Golinkoff, D. G. Singer, L. E. Berk, *Playing around in school: Implications of play on children’s learning*, Oxford, 2011, p. 147.

⁸ E. L. Deci, R. M. Ryan, *The “what” and “why” of goal pursuits: Human needs and the self-determination of behaviour*, “Psychological Inquiry”, 11(4), New York, 2000.

⁹ E. L. Deci, R. Koestner, R. M. Ryan, *A meta-analytic review of experiments examining the effects of extrinsic rewards on intrinsic motivation*, “Psychological Bulletin”, 125(6), New York, 1999.

¹⁰ M. R. Lepper, D. Greene, R. E. Nisbett, *Undermining children’s intrinsic interest with extrinsic rewards: A test of the “overjustification” hypothesis*, “Journal of Personality and Social Psychology”, 28, USA, 1973, 1:129-137.

¹¹ E. L. Deci, R. M. Ryan, *Intrinsic motivation and self-determination in human behaviour*, New York, 1985.

¹² E. L. Deci, R. M. Ryan, *The “what” and “why” of goal pursuits: Human needs and the self-determination of behaviour*, “Psychological Inquiry”, 11(4), 2000.

concepts and develop problem-solving skills¹³. However, at this developmental stage, extrinsic motivation also plays an important role in guiding behaviour and reinforcing positive habits. Simple incentives, such as verbal praise or stickers, can help children persist through challenges or follow classroom expectations. When used appropriately, these rewards can complement intrinsic motivation rather than undermine it. Research suggests that when teachers provide positive reinforcement in a way that supports autonomy, such as encouraging effort rather than just rewarding outcomes, children are more likely to develop a lasting love for learning¹⁴.

Ultimately, motivation is not a simple dichotomy but rather a spectrum where intrinsic and extrinsic factors interact. While intrinsic motivation is often ideal for fostering deep engagement, extrinsic motivation can serve as a useful tool in guiding behaviour, particularly when individuals need additional encouragement. The key lies in using external motivators in a way that supports autonomy and does not undermine intrinsic interest. Maintaining a balance between these two types of motivation is essential for sustained learning, achievement, and personal growth. In the context of pre-primary education, educators and caregivers must carefully design learning environments that cultivate children's intrinsic curiosity while strategically using extrinsic motivators to reinforce effort and persistence. By fostering both forms of motivation in a balanced manner, young learners can develop positive attitudes toward learning that extend well beyond their early years.

In traditional educational settings, intelligence is frequently equated with linguistic and logical-mathematical abilities, as these are the domains most emphasized in standardized tests and school curricula. Howard Gardner's Theory of Multiple Intelligences (MI), introduced in his seminal work *Frames of Mind: The Theory of Multiple Intelligences*¹⁵, challenges the traditional notion of intelligence as a fixed, singular construct and instead proposes a pluralistic view – one that recognizes distinct and equally valuable cognitive abilities¹⁶. His theory asserts that intelligence is not a single measurable entity but rather a combination of multiple cognitive strengths that individuals develop and utilize in different ways.

Howard Gardner initially proposed seven intelligences but later expanded the model to include nine, each representing a unique way in which individuals process information, solve problems, and engage with the world¹⁷. These intelligences

¹³ See: I. Gryz, Write or tell the story? – linguistic application of the online tools in developing writing and reading skills, [in:] "Radomskie Studia Filologiczne" Nr 1/10/2021, pp. 129-147, ISSN 2299-1131, e-ISSN 2720-4979, Radom, 2021.

¹⁴ D. Whitebread, M. Basilio, The emergence and early development of self-regulation in young children: A review of current research and implications for early childhood education, "Educational Psychology Review", 24, Cambridge, 2012, 3:1-35.

¹⁵ H. Gardner, *Frames of mind: The theory of multiple intelligences*, New York, 1983.

¹⁶ H. Gardner, *Intelligence reframed: Multiple intelligences for the 21st century*, New York, 1999, p. 85.

¹⁷ H. Gardner, *Multiple intelligences: New horizons in theory and practice*,

(linguistic, logical-mathematical, spatial, musical, bodily-kinaesthetic, interpersonal, intrapersonal, naturalistic, and existential) offer a more inclusive understanding of cognitive abilities and provide valuable insights for educators, psychologists, and learners alike.

This theory has significant implications, particularly in early childhood education, where young learners naturally exhibit diverse cognitive strengths. Some excel in storytelling, others in movement, while some show a strong inclination toward music or problem-solving. However, traditional educational systems often favour only certain types of intelligence, leading many children to feel disengaged, unmotivated, or even unintelligent simply because their strengths lie in less traditionally valued domains.

A well-rounded, individualized approach to education is essential. By recognizing and nurturing multiple intelligences, educators can create more inclusive, engaging, and effective learning environments that allow each child to thrive. The following sections explore each of Gardner's nine intelligences in depth, highlighting their characteristics, significance, and educational applications.

1. Linguistic Intelligence is the ability to use language effectively – both in spoken and written forms. It involves skills such as reading, writing, storytelling, persuasion, and memorization of words¹⁸. Individuals with high linguistic intelligence often excel in fields such as writing, law, public speaking, and education.

Linguistic intelligence is characterized by the ability to effectively use language for expression and connection, as seen in activities such as academic writing, debating, and engaging in meaningful conversations. In education, fostering linguistic intelligence involves activities like storytelling, creative writing, poetry, and discussions, which enhance communication skills and critical thinking¹⁹.

2. Logical-Mathematical Intelligence refers to the ability to think logically, analyze problems, and recognize patterns. Howard Gardner describes it as “*the capacity to understand logical relationships, solve abstract problems, and think critically*”²⁰. This intelligence is highly valued in fields such as mathematics, engineering, science, and programming.

New York, 2006, p. 122.

¹⁸ H. Gardner, *Intelligence reframed: Multiple intelligences for the 21st century*, New York, 1999, p. 67.

¹⁹ See: I. Gryz, *Methods in Practice*. Coursebook for Future Teachers, Radom, 2022, ISBN 978-83-7351-968-8, p. 27.

²⁰ H. Gardner, *Intelligence reframed: Multiple intelligences for the 21st century*, New York, 1999, p. 92.

Individuals with strong logical-mathematical intelligence often excel in puzzles, strategic games, and experiments. In educational settings, this intelligence can be nurtured through hands-on problem-solving, mathematical reasoning tasks, and coding exercises.

3. Spatial Intelligence involves the ability to visualize, manipulate, and interpret spatial relationships. Howard Gardner states that “*those with high spatial intelligence excel in visual arts, architecture, and navigation*”²¹.

This intelligence is evident in painters, designers, architects, and engineers who can create and manipulate visual imagery with ease. A person with spatial intelligence developed is someone who never struggles with spatial reasoning. The ability to interpret maps, design structures, and create visually compelling artwork demonstrates a high level of spatial intelligence. In education, fostering spatial intelligence involves activities such as drawing, sculpting, model-building, and visualization exercises.

4. Musical Intelligence is the ability to recognize and create musical patterns, tones, and rhythms. Howard Gardner explains that “*musical intelligence allows individuals to perceive, appreciate, and produce music at a sophisticated level*”²².

Musically intelligent individuals often become composers, musicians, singers, or sound engineers. People with strong musical intelligence have an intuitive grasp of rhythm and melody. In education, using songs, rhythm-based learning, and instrumental activities can enhance musical intelligence and make learning more engaging.

5. Bodily-Kinaesthetic Intelligence refers to physical coordination, movement, and fine motor skills. Howard Gardner²³ emphasizes that “*athletes, dancers, surgeons, and craftsmen excel in bodily-kinaesthetic intelligence*”.

Kinaesthetic learners struggle with traditional classroom settings but thrive in hands-on, movement-based activities. Incorporating role-playing, physical games, and interactive projects in education can benefit students with high bodily-kinaesthetic intelligence.

²¹ H. Gardner, *Multiple intelligences: New horizons in theory and practice*, New York, 2006, p. 124.

²² H. Gardner, *Intelligence reframed: Multiple intelligences for the 21st century*, New York, 1999, p. 136.

²³ H. Gardner, *Multiple intelligences: New horizons in theory and practice*, New York, 2006, p. 143.

6. Interpersonal Intelligence is the ability to understand, interact with, and relate to others effectively. Howard Gardner describes it as *“essential for leadership, teamwork, and communication”*²⁴.

Learners with strong interpersonal intelligence often excel in teaching, counselling, leadership, and social work. In pre-primary education, fostering this intelligence involves group projects, collaborative games, and social-emotional learning activities.

7. Intrapersonal Intelligence involves deep self-awareness, reflection, and understanding of one's emotions. Howard Gardner notes that *“those with strong intrapersonal intelligence are introspective, goal-oriented, and insightful”*²⁵.

Encouraging journaling, mindfulness, and self-reflection in education helps students develop this intelligence, enhancing their personal growth and emotional resilience.

8. Naturalistic Intelligence is the ability to recognize patterns in nature, classify organisms, and engage with the environment²⁶. *“It is the ability to understand the world through surroundings, the environment, to recognize and categorize the world of fauna and flora and other natural objects”*²⁷.

Children with this intelligence love animals, plants, and outdoor exploration. In education, incorporating nature walks, gardening, and environmental science supports their curiosity and engagement.

9. Existential Intelligence involves the ability to ponder deep philosophical and spiritual questions. Howard Gardner²⁸ suggests that *“those with existential intelligence reflect on the meaning of life, ethics, and abstract concepts”*.

Encouraging debates, ethical discussions, and literature exploration can develop this intelligence in learners.

²⁴ H. Gardner, *Intelligence reframed: Multiple intelligences for the 21st century*, New York, 1999, p. 158.

²⁵ H. Gardner, *Multiple intelligences: New horizons in theory and practice*, New York, 2006, p. 167.

²⁶ H. Gardner, *Intelligence reframed: Multiple intelligences for the 21st century*, New York, 1999, p. 178.

²⁷ I. Gryz, *Methods in Practice. Coursebook for Future Teachers*, Radom, 2022, ISBN 978-83-7351-968-8, p. 146.

²⁸ H. Gardner, *Multiple intelligences: New horizons in theory and practice*, New York, 2006, p. 183.

As I have explored the Theory of Multiple Intelligences (MI) and its implications for learning, I have come to realize that intrinsic motivation plays a fundamental role in the development and expression of different intelligences. Gardner's theory suggests that intelligence is not a single, fixed ability but rather a combination of multiple cognitive strengths, each of which can be nurtured through meaningful and personalized learning experiences^{29, 30}. This directly aligns with the principles of intrinsic motivation, which refers to the internal drive to engage in activities for their inherent satisfaction rather than for external rewards³¹.

One of the most compelling aspects of Gardner's theory is that it acknowledges individual differences in learning preferences, which in turn influences what intrinsically motivates a person. People are naturally drawn to activities that align with their dominant intelligences because these activities provide a sense of competence, autonomy, and enjoyment – all key factors in fostering intrinsic motivation³².

For instance, a child with high musical intelligence will likely be intrinsically motivated to engage in musical activities, such as playing an instrument or composing melodies. They do not require external rewards to practice music; rather, their passion and enjoyment come from the process itself. Similarly, a learner with strong bodily-kinaesthetic intelligence may feel most engaged when participating in movement-based activities, such as dance, sports, or hands-on learning. When educational experiences are designed to align with a child's natural intelligence, they are more likely to develop a deep, self-sustained love for learning rather than relying on extrinsic rewards like grades or praise.

Moreover, Gardner's framework reinforces the idea that learning environments should cater to multiple intelligences to support motivation. In traditional classroom settings, where linguistic and logical-mathematical intelligences are often prioritized, students who excel in spatial, musical, or kinaesthetic domains may struggle to stay engaged. If they do not see value in the content or find it personally meaningful, their intrinsic motivation can diminish. However, when educators integrate multiple modes of learning, such as visual storytelling, music, role-playing, or hands-on experiments, students feel a greater connection to the material, increasing their intrinsic drive to learn³³.

²⁹ H. Gardner, *Frames of mind: The theory of multiple intelligences*, New York, 1983, p. 45.

³⁰ H. Gardner, *Intelligence reframed: Multiple intelligences for the 21st century*, New York, 1999, p. 67.

³¹ E. L. Deci, R. M. Ryan, The "what" and "why" of goal pursuits: Human needs and the self-determination of behaviour, "Psychological Inquiry", 11(4), New York, 2000, p. 54.

³² E. L. Deci, R. M. Ryan, *Intrinsic motivation and self-determination in human behaviour*, New York, 1985, p. 112.

³³ T. Armstrong, *Multiple intelligences in the classroom* (4th ed.), Virginia, USA, 2017, p. 76.

This connection is particularly important in pre-primary education, where children's natural curiosity and intrinsic motivation are at their peak. Young learners are exploratory by nature, and their intrinsic motivation thrives when they are given opportunities to engage in activities that align with their dominant intelligences³⁴. For example, a preschooler with high interpersonal intelligence will be more engaged in cooperative group activities, while a child with strong spatial intelligence may prefer working with puzzles or art projects. If their learning experiences match their natural inclinations, they remain motivated, engaged, and willing to explore new challenges.

Additionally, when intrinsic motivation is supported through Gardner's MI framework, students are more likely to develop long-term persistence and creativity in their areas of strength. This is particularly important in skill development. For example, a student with high linguistic intelligence may find joy in writing poetry or storytelling, leading them to continue refining their skills well into adulthood. By contrast, if a learner is forced to engage in subjects that do not align with their intelligence profile, they may become disengaged or dependent on extrinsic motivators like grades or external validation.

Gardner's Theory of Multiple Intelligences and intrinsic motivation are deeply interconnected. When individuals engage in activities that align with their dominant intelligences, they experience greater engagement, persistence, and enjoyment, which are hallmarks of intrinsic motivation. By recognizing and nurturing diverse intelligences, educators can create learning environments that not only enhance academic achievement but also foster a lifelong love for learning. Understanding this relationship allows for a more inclusive and motivating educational experience, particularly in early childhood development, where cultivating a child's natural strengths is essential for their cognitive and emotional growth.

Understanding the relationship between intrinsic motivation and multiple intelligences is particularly valuable in pre-primary education, where young learners are naturally driven by curiosity and exploration. At this developmental stage, children are not yet influenced by external pressures such as grades or standardized assessments. Instead, their motivation to learn stems primarily from intrinsic factors – the joy of discovery, the excitement of mastering a new skill, or the satisfaction of solving a problem³⁵. Young children naturally engage in activities that match their dominant intelligences, often without needing external rewards. For example, a child with high bodily-kinaesthetic intelligence will be drawn to movement-based activities like running, climbing, or dancing. A person with strong linguistic intelligence may love telling stories, singing songs, or engaging in conversations

³⁴ D. Whitebread, M. Basilio, The emergence and early development of self-regulation in young children: A review of current research and implications for early childhood education, "Educational Psychology Review", 24, Cambridge, 2012, 3:1-35.

³⁵ Ibidem.

with peers and teachers. A learner with spatial intelligence may prefer puzzles, drawing, or playing with building blocks.

When children are given opportunities to learn through their preferred intelligences, they experience a sense of competence, autonomy, and enjoyment – all essential components of intrinsic motivation³⁶. This early engagement is critical for long-term learning success, as children who develop a love for learning at a young age are more likely to remain motivated and engaged in future academic pursuits³⁷.

One of the key challenges in early childhood education is ensuring that all children feel capable and valued. Traditional educational models tend to emphasize linguistic and logical-mathematical intelligence, often overlooking children whose strengths lie in other areas, such as music, movement, or social interaction³⁸. This can lead to frustration or disengagement, particularly for children who do not thrive in traditional learning environments. To foster intrinsic motivation in pre-primary learners, educators should create learning environments that:

1. Recognize and respect diverse intelligences by offering varied learning activities, such as storytelling, hands-on experiments, music, and outdoor exploration, educators can engage children in ways that feel natural and enjoyable to them.
2. Encourage autonomy and choice allowing young learners to choose activities based on their interests fosters a sense of independence and personal responsibility for learning.
3. Use play-based learning because play is one of the most effective ways to nurture intrinsic motivation and multiple intelligences

While working with pre-primary learners who are acquiring English as a Second Language (ESL), the use of play-based learning is essential. Young children naturally develop language skills through interaction, movement, and sensory experiences, making traditional rote memorization ineffective at this stage. Games that incorporate multiple intelligences^{39, 40} can significantly enhance intrinsic motivation⁴¹ while reducing language anxiety⁴². The following two games are

³⁶ E. L. Deci, R. M. Ryan, The “what” and “why” of goal pursuits: Human needs and the self-determination of behaviour, “Psychological Inquiry”, 11(4), New York, 2000.

³⁷ A. Gopnik, A. N. Meltzoff, P. K. Kuhl, *The scientist in the crib: Minds, brains, and how children learn*, USA, 1999.

³⁸ T. Armstrong, *Multiple intelligences in the classroom* (4th ed.), Virginia, USA, 2017.

³⁹ H. Gardner, *Frames of mind: The theory of multiple intelligences*, New York, 1983.

⁴⁰ H. Gardner, *Intelligence reframed: Multiple intelligences for the 21st century*, New York, 1999.

⁴¹ E. L. Deci, R. M. Ryan, The “what” and “why” of goal pursuits: Human needs and the self-determination of behaviour, “Psychological Inquiry”, 11(4), New York, 2000.

⁴² S. D. Krashen, *Principles and practice in second language acquisition*, Oxford, 1982.

designed to be highly engaging, developmentally appropriate, and rich in linguistic exposure, ensuring that children learn English in an enjoyable and meaningful way.

1. “Mystery Sound Adventure” – A Multisensory Language Exploration Game

This auditory and kinaesthetic-based game is designed to support listening comprehension, vocabulary acquisition, and pronunciation skills in pre-primary ESL learners. Inspired by Gardner’s musical, bodily-kinaesthetic, and linguistic intelligences, the activity encourages children to connect sounds to meaning in an interactive and imaginative way.

Objectives:

- to help children develop phonemic awareness,
- improve listening skills,
- expand English vocabulary by associating sounds with actions, objects, and storytelling.

Materials: a “mystery box” filled with small objects (e.g., a bell, toy car, animal figurines, crinkled paper); sound clips or real-life sound makers (e.g., a whistle, rain stick, drum); flashcards or images representing the mystery sounds.

Procedure:

1. Setting the Scene: Teacher introduces the game as a “secret sound adventure”. Children are explorers on a journey to discover mysterious sounds in an enchanted world (e.g.: a jungle, ocean, or magical forest).
2. Listening & Guessing: Teacher plays a sound (e.g.: a lion roaring, a train whistle, rain falling). Children must guess what they hear by pointing to a matching picture or saying the word aloud.
3. Movement & Storytelling: Once the correct sound is identified, children are invited to act out the sound (e.g.: pretending to be a lion roaring, mimicking the movement of falling rain). Teacher then weaves the sounds into a simple story, reinforcing sentence structure (e.g.: “*The lion ROARS in the jungle, and the train CHOO-CHOOS past the trees*”).
4. Object Matching: Children take turns pulling objects from the mystery box and matching them to the sound that was played. This reinforces tactile learning and words association.
5. Extension Activity: Older pre-primary learners can describe what they hear using simple adjectives (e.g.: “*The lion is BIG and LOUD*”).

Advantages:

- ✓ the auditory and kinaesthetic approach engages children naturally, making language acquisition immersive and memorable⁴³,

⁴³ A. Gopnik, A. N. Meltzoff, P. K. Kuhl, *The scientist in the crib: Minds, brains, and how children learn*, USA, 1999.

- ✓ by incorporating movement and play, children physically interact with language, reducing the pressure to produce speech while still reinforcing vocabulary⁴⁴,
- ✓ the storytelling aspect fosters intrinsic motivation, as children feel like they are on an adventure rather than in a structured lesson⁴⁵.

2. “Magic Colour Hunt” – A Playful Scavenger Game for Vocabulary and Sentence Building

This visual, interpersonal, and movement-based game taps into young learners’ natural curiosity while reinforcing colour recognition, object vocabulary, and basic sentence structures. It aligns with spatial, bodily-kinaesthetic, and linguistic intelligences⁴⁶ and fosters collaborative learning through peer interaction.

Objectives:

- to help children practice English colour words, object names,
- to help learners train simple descriptive phrases while engaging in a playful and interactive scavenger hunt.

Materials: a colour wheel or large, colourful flashcards; small baskets or bags for collecting objects; a “magic wand” (can be a decorated stick or teacher’s pointer).

Procedure:

1. Introducing the Game: Teacher transforms into a “Colour Wizard” and tells the children that the classroom (or outdoor play area) has been enchanted! The only way to break the spell is to find magical objects that match specific colours.
2. Magic Wand Selection: Teacher waves the magic wand and announces a colour in English (e.g.: “Find something RED!”).
3. Scavenger Hunt: Children race around the room (or designated area) to find an object of the specified colour. When they find something, they bring it back and say what it is (e.g.: “Red apple!” or “Blue ball!”).
4. Building Sentences: Once all the objects have been collected, the teacher models simple sentences, encouraging children to repeat: “I found a yellow banana!”, “The car is green!”, “This is a red hat!”.
5. Variation for Advanced Learners: For children who are ready, the teacher adds adjectives or actions: “The small teddy bear is brown”, “The blue ball bounces!”

⁴⁴ D. Whitebread, M. Basilio, The emergence and early development of self-regulation in young children: A review of current research and implications for early childhood education, “Educational Psychology Review”, 24, Cambridge, 2012, 3:1-35.

⁴⁵ E. L. Deci, R. M. Ryan, The “what” and “why” of goal pursuits: Human needs and the self-determination of behaviour, “Psychological Inquiry”, 11(4), New York, 2000.

⁴⁶ H. Gardner, *Intelligence reframed: Multiple intelligences for the 21st century*, New York, 1999.

6. Creative Expansion: Children can sort objects by colour, create a rainbow display, or use the items to tell a short story (e.g.: “*Once upon a time, the red apple and blue ball went on an adventure!*”).

Advantages:

- ✓ this game engages multiple senses, making language learning fun, physical, and memorable⁴⁷,
- ✓ by incorporating movement and play, it lowers language anxiety⁴⁸ while allowing children to practice speaking without fear of mistakes,
- ✓ the scavenger hunt format provides an intrinsically motivating challenge, as children see it as a game rather than a structured lesson⁴⁹,
- ✓ the use of real objects instead of flashcards ensures that language is learned in a real-world, meaningful context, making it easier to remember and apply⁵⁰.

When educators embrace creativity, play, and active engagement, language learning becomes not just effective, but also joyful and deeply meaningful, laying a strong foundation for future academic success. The interplay between intrinsic motivation and multiple intelligences is particularly evident in pre-primary learners, who rely on natural curiosity, play, and exploration as their primary learning tools. Gardner’s MI theory offers a powerful framework for understanding why children engage differently with learning experiences and how educators can tailor instruction to meet their needs. When learning aligns with a child’s natural intelligence, intrinsic motivation flourishes, leading to higher engagement, creativity, and long-term interest in education. By embracing a multiple intelligences approach in pre-primary education, we not only respect children’s unique ways of learning but also ensure that their motivation to learn remains strong and self-sustained throughout their academic journey.

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⁴⁷ T. Armstrong, *Multiple intelligences in the classroom* (4th ed.), Virginia, USA, 2017.

⁴⁸ S. D. Krashen, *Principles and practice in second language acquisition*, Oxford, 1982.

⁴⁹ E. L. Deci, R. M. Ryan, *The “what” and “why” of goal pursuits: Human needs and the self-determination of behaviour*, “Psychological Inquiry”, 11(4), New York, 2000.

⁵⁰ A. Gopnik, A. N. Meltzoff, P. K. Kuhl, *The scientist in the crib: Minds, brains, and how children learn*, USA, 1999.

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CULTURAL ANALYSIS IN ONLINE COURSE DESIGN: PROMOTING INCLUSIVE PEDAGOGY

Abstract: Online education has proven a groundbreaking advent, breaking down temporal and spatial barriers to learning and expanding access to education on a global scale. However, the international proliferation of online education has also led to increasingly multicultural and multilingual student bodies. Today, most online courses are designed using Western cultural values but are frequently accessed by non-Western students. Utilizing Hofstede's Cultural Dimensions Theory and Hall's High-Context Low-Context Cultural Theory as a theoretical framework, this review synthesizes the empirical research on promoting cultural inclusivity in online education. In doing so, it offers recommendations for designing online course materials to better accommodate the needs of culturally and linguistically diverse students. The findings of this study indicate that intentional online course design can promote measurable improvements in cultural inclusivity and cultural responsiveness, and that such interventions can create more equitable and effective online learning environments.

Keywords: Online learning, Culturally inclusive instructional design, Culturally responsive pedagogy, Multicultural education, Cross-cultural communication, Cultural dimensions theory, Global education

Streszczenie: Edukacja online okazała się przełomowym osiągnięciem, przełamującym bariery czasowe i przestrzenne w uczeniu się oraz poszerzającym dostęp do edukacji w skali globalnej. Jednak międzynarodowy rozkwit edukacji online doprowadził również do wzrostu liczby studentów pochodzących z różnych kultur i posługujących się różnymi językami. Obecnie większość kursów online jest projektowana w oparciu o zachodnie wartości kulturowe, ale często korzystają z nich również studenci spoza Zachodu. Wykorzystując teorię wymiarów kulturowych Hofstede'a i teorię wysokiego i niskiego kontekstu kulturowego Halla jako ramy teoretyczne, niniejszy artykuł syntetyzuje badania empiryczne dotyczące promowania inkluzyjności kulturowej w edukacji online. W ten sposób przedstawia rekomendacje dotyczące projektowania materiałów do kursów online, aby lepiej odpowiadały potrzebom studentów zróżnicowanych kulturowo i językowo. Wyniki niniejszego badania wskazują, że celowe projektowanie kursów online może

promować wymierne korzyści w zakresie inkluzywności kulturowej i wrażliwości kulturowej, a takie praktyki mogą tworzyć bardziej sprawiedliwe i efektywne środowiska uczenia się online.

Słowa kluczowe: nauka online, projekt nauczania uwzględniający różnorodność kulturową, pedagogika uwzględniająca różnorodność kulturową, edukacja wielokulturowa, komunikacja międzykulturowa, teoria wymiarów kulturowych, edukacja globalna.

The Case for Cultural Analysis in Online Course Design

Since the mid-2000s, online education has shifted from a mere fragment of the educational landscape to a ubiquitous feature of the student experience. In 2021 alone, 61% of American undergraduate students were enrolled in at least one online class.¹ Today, it is nearly impossible for U.S. K-12 or university students to graduate without having engaged in at least some form of online instruction. For instance, some universities now require online learning modules, such as “Active Attacker Awareness” and “Sexual Assault Prevention,” before students can enroll in coursework,² and many U.S. states mandate at least one online course or experience for high school graduation.³ In all, online learning is now an essential mode of content delivery for both formal and informal instruction in a variety of educational contexts.

Also known as *e-learning* or *distance learning*, online learning’s rapid expansion has not been limited to the U.S. alone. Since the 2020 COVID-19 pandemic, online learning has expanded the most rapidly in emerging economies.⁴ The global expansion of online education has enabled countless students to access affordable, high-quality education without temporal or spatial limitations.⁵ Still, the prolific growth of online learning poses new challenges, namely in the cultural appropriacy of materials. Scholars have noted that currently, a large portion of online learning materials reflect deeply ingrained Western cultural values, specifically Anglo-American. These materials are generally intended for Anglosphere learners without consideration for the cultural profiles of actual students.⁶ This disparity exposes

¹ National Center for Education Statistics, *Postbaccalaureate Enrollment*, U.S. Department of Education, 2023.

² University of Virginia Student Affairs, *Online requirements for new and returning students*, n.d.

³ Digital Learning Collaborative, *Online learning graduation requirements*, 2018.

⁴ Wood, J., *These 3 charts show the global growth in online learning*, World Economic Forum, 2022.

⁵ Gunawardena, C. N., *Culture and online distance learning*, in M. G. Moore (ed.), “Handbook of Distance Education (3rd ed.)”, Routledge, 2013, pp. 185-200.

⁶ de Brito Neto, J. F., Smith, M., & Pedersen, D., *E-learning in multicultural environments*, “British Journal of Educational Technology”, 2014, pp. 1060-1068.; Frechette, C., Gunawardena, C. N., & Layne, L., *How to design culturally inclusive online learning*

a major weakness in the online learning industry: the cultural (in)appropriacy of online learning content.

In 2016, Frechette and colleagues observed that “as students become more diverse, teaching materials and methods often are not adapted accordingly. The design and delivery of instruction often fails to account for differences in how students think, communicate, and learn.”⁷ Nearly a decade later, many courses still fail to reflect these insights. Problems frequently arise (e.g. student failure and attrition) when courses, online being no exception, fail to accommodate students’ expectations and abilities.⁸ In most cases when adjustments are made, this rarely extends beyond a superficial translation of the learning interface.⁹ While it is widely accepted that learning should be built upon students’ identities,¹⁰ culture differences are frequently disregarded in online learning environments.¹¹ To address this challenge, online learning design requires a renewed approach that meets the needs of diverse learners: one that acknowledges the importance of culturally relevant content and cross-cultural communication.¹²

In this review, I consider ways to improve online learning curricula through Culturally Inclusive Instructional Design (CIID). I argue that to appropriately meet students’ needs and expectations, students’ individual and group cultural identities must first be understood. This knowledge enables curricular adjustments and design for diverse cultural identities. The following research questions guided this review:

1. How can students’ cultural backgrounds be accurately assessed and defined?
2. How can insights into students’ cultural backgrounds inform online course design?
3. How can online course design be purposely adapted to promote cultural inclusivity?

experiences, “Journal of Distance Education in China”, 2016, pp. 5-14.

⁷ Frechette et al., *How to design culturally inclusive online learning experiences...*

⁸ Rogers, P. C., Graham, C. R., & Mayes, C. T., Cultural competence and instructional design: Exploration research into the delivery of online instruction cross-culturally, “Educational Technology Research and Development”, 2007, pp. 197-217.

⁹ Downey, S., Wentling, R. M., Wentling, T., & Wadsworth, A., The relationship between national culture and the usability of an e-learning system, “Human Resource Development International”, 2005, pp. 47-64.

¹⁰ Gay, G., *Culturally responsive teaching*, Teachers College Press, 2010.

¹¹ Frechette et al., *How to design culturally inclusive online learning experiences...*

¹² Chau, H. T. H., Bui, H. P., & Dinh, Q. T. H., Impacts of online collaborative learning on students’ intercultural communication apprehension and intercultural communicative competence, “Education and Information Technologies”, 2024, pp. 7447-7464; Gurjar, N., & Bai, H., Assessing culturally inclusive instructional design in online learning, “Educational Technology Research and Development”, 2023, pp. 1253-1274; Kumi-Yeboah, A., Dogbey, J., & Yuan, G., Online collaborative learning activities: The perspectives of minority graduate students, “Online Learning”, 2017, 21(4).

Literature Review

This literature review examines empirical research on culture and education, with an emphasis on research conducted in online learning environments. This review uses peer-reviewed empirical studies and follows a thematic organizational approach. Given the rapid evolution of online learning tools, this review focuses on empirical research published since 2015. However, seminal and other highly influential works are also included due to their lasting impact. All research was gathered using the databases offered through the University of Virginia Library.

Connecting Education and Culture

Culture provides its users with a framework for discerning meaning from an otherwise entropic world. It mediates both thinking and action, helping individuals (dis)identify with social values, standards of behavior, worldviews, and creeds. In this sense, culture could accurately be described as the foundation for interacting with, interpreting, and acquiring new knowledge.¹³ Culture notably defines the process of knowledge acquisition because all learning and cognitive development are shaped by the features, symbols, and language from an individual's self-identified culture.¹⁴ Despite its immense depth, various attempts have been made to accurately distinguish cultural differences and more definitively define how culture impacts the learning process.¹⁵

Overview of Hofstede's Dimensions

Hofstede's Cultural Dimensions Theory (CDT) is one of the most commonly cited theoretical frameworks for explaining cultural differences. Through analysis of over 116,000 questionnaires, it was one of the first major works to classify the intricacies of cultural identity and cross-cultural interactions. CDT initially revealed four key dimensions of cultural behavior: Power Distance; Individualism versus Collectivism; Uncertainty Avoidance; and Masculinity versus Femininity. Subsequent years saw the addition of Short-Term Orientation versus Long-Term Orientation¹⁶ and Indulgence versus Restraint.¹⁷ Hofstede's seminal research was later expanded to incorporate Cultural Dimensions Theory in educational contexts.¹⁸

Power Distance (PD). PD refers to one's acceptance of the distribution of power and wealth within a community, society, or organization. A high-PD score indicates

¹³ Vygotsky, L. S., *Mind in society*, Harvard University Press, 1978.

¹⁴ Ibid.

¹⁵ Hall, E. T., *Beyond culture*, Anchor, 1976; Hofstede, G., *Cultural differences in teaching and learning*, "International Journal of Intercultural Relations", 1986, pp. 301-320.

¹⁶ Hofstede, G., & Bond, M. H., *The Confucius connection: From cultural roots to economic growth*, "Organizational Dynamics", 1988, pp. 5-21.

¹⁷ Hofstede, G., Hofstede, G. J., & Minkov, M., *Cultures and organizations: Software of the mind* (3rd ed.), McGraw-Hill, 2010.

¹⁸ Hofstede, *Cultural differences in teaching and learning*...

approval of a disproportionate distribution of power and influence within a community, while a low-PD score indicates disapproval of societal inequalities.¹⁹

Individualism vs. Collectivism (IvC). IvC measures beliefs on whether members of a society feel it is more important to prioritize the success and well-being of individuals or the collective.²⁰

Uncertainty Avoidance (UA). UA considers how cultures regard uncertainty. High UA scores reveal discomfort with unstructured ideas and situations, while low UA scores indicate greater ease with risks and unfamiliarity.²¹

Masculinity vs. Femininity (MvF). MvF highlights a society's view on fixed gender roles. A high MvF score signifies rigid gender norms, while a low MvF score shows acceptance of fluid gender roles.²²

Hall's High-Context and Low-Context Culture Theory

Another critical theory in the classification of culture is Hall's High-Context and Low-Context Culture Theory. In his 1976 book *Beyond Culture*,²³ Hall identified and divided the underlying cultural structures that influence communication and behavior into two primary categories, High-Context (HC) and Low-Context (LC) systems.

HC Cultures. According to Hall, interlocutors from HC cultures "expect more of others than do the participants in Low-Context systems."²⁴ The author offers support for this theory by explaining that those from HC cultures regularly utilize non-verbal and contextual cues to express meaning. Consequently, HC cultures require members to have significant cultural familiarity to discern meaning from the non-verbal cues expressed in communication events. Another key feature of HC systems includes fixed, tacitly understood social structures, such as a hierarchical relationship between a teacher and student. Relationships such as these represent a rigid set of cultural norms and expectations.

LC Cultures. In contrast to HC cultures, LC cultures discern meaning through explicit spoken interactions or expressly worded written language.²⁵ According to Hall, individuals from LC cultures therefore tend to disregard, if not completely overlook, non-verbal, contextual cues expressed in communication. For example, Hall describes differences in the interpretation of literature between individuals from HC and LC cultures. Interestingly, Hall found that individuals from LC cultures tended to overlook key information in literature from HC culture due to an

¹⁹ Westbrook, T. P., Global contexts for learning: Exploring the relationship between low-context online learning and high-context learners, "Christian Higher Education", 2014, pp. 281-294.

²⁰ Ibid.

²¹ Hofstede, Cultural differences in teaching and learning...

²² Ibid.

²³ Hall, *Beyond culture*...

²⁴ Ibid., p. 113.

²⁵ Ibid.

irreverence of significance.²⁶ Figure 1 provides a classification of the perceived HC and LC ratings of various countries, giving a representation of various countries' classifications according to Hall's model. It should be noted that this figure represents a rough, potentially inaccurate, continuum that describes national cultural characteristics.

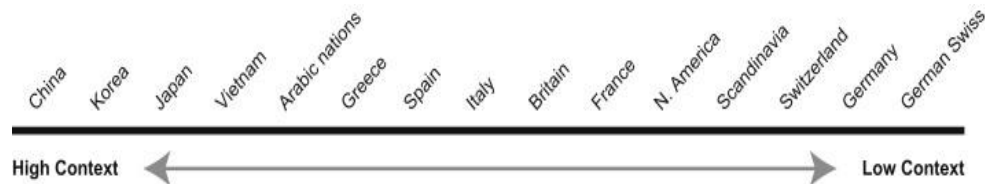


Figure 1. High-Context to Low-Context Culture Ratings

Note. Reprinted from: Barnum, C. M., *International usability testing, in Usability Testing Essentials* (2nd ed.), Morgan Kaufmann, 2021, pp. 367-410

Criticisms of Hofstede's Cultural Dimensions Theory and Hall's High-Context and Low-Context Culture Theory

Despite widespread adoption by educational researchers, it should be noted that Hofstede's Cultural Dimensions Theory has received numerous challenges. One common criticism is Hofstede's emphasis of fixed cultural identity and assumed national uniformity, as opposed to individually constructed, fluid culture.²⁷ Similarly, Hall's High-Context and Low-Context Culture Theory has received challenges on the grounds that it oversimplifies the complexity of culture.²⁸ As Gunawardena states:

[various studies] note that Hofstede's framework and to a lesser extent Hall's conceptualization of culture appear to be limited to national cultural differences and thus less well-suited for understanding and researching the multiple cultural differences within nation-states, including the 'third' or hybrid identities that are themselves fostered by the cultural flows facilitated by the Internet and the web.²⁹

Despite these objections, Hofstede's Cultural Dimensions Theory remains the benchmark for discussing of cultures or values,³⁰ and Hall's High-Context

²⁶ Ibid., p. 114.

²⁷ McSweeney, B., *Hofstede's model of national cultural differences and their consequences: A triumph of faith — a failure of analysis*, "Human Relations", 2002, pp. 89-118.

²⁸ Gunawardena, C. N., *Culture and online distance learning*, in M. G. Moore (ed.), *Handbook of Distance Education* (3rd ed.), Routledge, 2013, pp. 185-200.

²⁹ Ibid., p. 118.

³⁰ McLeay, F., & Wesson, D., *Chinese versus UK marketing students' perceptions of peer feedback and peer assessment*, "International Journal of Management

and Low-Context Culture Theory “remains useful for analyzing cultural differences in communication online.”³¹ As such, the theories of Hofstede and Hall remain poignant in the study of cross-cultural communication in education in multicultural environments and remain highly influential theories in the discussion and analysis of culturally assigned behaviors and values.

Considering Culture in the Classroom

Ultimately, any attempt to define culture will fall short because culture is fundamentally heterogeneous and thus defined by individuals themselves. In other words, each person has “a ‘cultural DNA’ -- a mix of beliefs and values with parts shared by others but the sum of those parts unique to ourselves.”³² Yet paradoxically, only by recognizing the polythetic composition of culture can one form a stronger appreciation for the significance of communal norms and values. Group collaboration is what gives culture a greater expression of power and meaning,³³ which gravitates onlookers to use a broad brush when considering cultural identities. More accurately, general assumptions on culture as a self-determining force should be regarded with caution. As such, while it has been established that individuals within a society do not subscribe to *identical cultures*, research has shown that ascribed group culture still has the potential to significantly influence preferences, expectations, and actions.³⁴

Applying Hofstede’s Cultural Dimensions Theory to the Classroom

Behaviors seen as appropriate in one cultural context could easily be viewed as wholly inappropriate in another. In line with this, numerous studies have examined how ethnic, linguistic, and cultural identity can influence student behavior.³⁵ Hofstede noted that in instances with learners and/or teachers from

Education”, 2014, pp. 142-150.

³¹ Gunawardena, *Culture and online distance learning...*, p. 118.

³² Frechette et al., *How to design culturally inclusive online learning experiences...*, p. 3.

³³ Ibid.

³⁴ Hofstede, *Cultural differences in teaching and learning...*; Kumi-Yeboah, A., Dogbey, J., & Yuan, G., *Online collaborative learning activities: The perspectives of minority graduate students*, “Online Learning”, 2017, 21(4); Liu, X., Liu, S., Lee, S., & Magjuka, R. J., *Cultural differences in online learning: International student perceptions*, “Educational Technology & Society”, 2010, pp. 177-188; Wang, Q., Xu, Z., Tao, J., & Brown, S., *A cross-cultural investigation of the impact of USA and Chinese teachers’ classroom-coaching behaviours on undergraduate students’ learning*, “International Coaching Psychology Review”, 2023, pp. 70-95.

³⁵ Chau, H. T. H., Bui, H. P., & Dinh, Q. T. H., *Impacts of online collaborative learning on students’ intercultural communication apprehension and intercultural communicative competence*, “Education and Information Technologies”, 2024, pp. 7447-7464; Cranfield, D. J., Tick, A., Venter, I. M., Blignaut, R. J., & Renaud, K., *Higher education students’ perceptions of online learning during COVID-19 — a comparative study*, “Education

different cultural groups, *perplexities* frequently occur, especially as it relates to the interpretation of curricular content and teacher-to-student and student-to-student expectations.³⁶ Recent research³⁷ further applied Hofstede's Cultural Dimensions Theory to better explain culture's role in cross-cultural education, specifically as it relates to power distance and uncertainty avoidance.

Hofstede's Cultural Dimensions in the Classroom. Research by Wang, Xu, Tao, and Brown³⁸ suggested significant differences in classroom behaviors by American and Chinese students. The study examined the effect of specific classroom coaching behaviors, such as praise, on student performance. While classroom coaching behaviors proved ultimately beneficial for all the study participants, praise yielded a measurably higher efficacy rate for the American students' performance. Based on their findings, the researchers proposed that cultural differences have an impact on classroom behaviors and the overall learning process. Considering the cultural differences between the United States and China, specifically in the Power Distance Dimension,³⁹ this study hints at how pre-conceived educational expectations differ between cultures of learning. In a similar study, Chau, Bui, and Dinh⁴⁰ analyzed a bi-cultural, online classroom. Using Hofstede's Cultural Dimensions Theory, the authors noted that those from low power distance cultures were more likely to favorably measure an online learning environment's usability compared to students from high power distance cultures. The researchers also observed noticeably different results in student performance during whole class and small-group discussions, reporting that the Taiwanese students from the study self-assessed themselves as having a higher uncertainty avoidance in a pre-course survey, which was reflected in their classroom behavior. Downey, Wentling, Wentling, and Wadsworth⁴¹ similarly reported that students from high-UA cultures tended to rate e-learning systems as more difficult to use and had the highest error rates, measured by the number of incorrect mouse clicks.

Sciences", 2021, p. 403; Downey, S., Wentling, R. M., Wentling, T., & Wadsworth, A., *The relationship between national culture and the usability of an e-learning system*, "Human Resource Development International", 2005, pp. 47-64; Kumi-Yeboah et al., *Online collaborative learning activities...*; Liu et al., *Cultural differences in online learning...*; Yang, D., Olesova, L., & Richardson, J. C., *Impact of cultural differences on students' participation, communication, and learning in an online environment*, "Journal of Educational Computing Research", 2010, pp. 165-182.

³⁶ Hofstede, *Cultural differences in teaching and learning...*

³⁷ Chau et al., *Impacts of online collaborative learning...*; Downey et al., *The relationship between national culture...*; Wang et al., *A cross-cultural investigation...*; Yang et al., *Impact of cultural differences...*

³⁸ Wang et al., *A cross-cultural investigation...*

³⁹ Liu et al., *Cultural differences in online learning...*

⁴⁰ Chau et al., *Impacts of online collaborative learning...*

⁴¹ Downey et al., *The relationship between national culture...*

McLeay and Wesson⁴² studied the peer review behaviors of Chinese and British students in homogeneous and heterogeneous peer review groups at a British university. The study's results showed that the Chinese international students were much more likely to engage in peer review when in a homogeneous group made up of other Chinese students, stating that they felt it was "fairer."⁴³ The researchers attributed this to a lack of intercultural confidence and stated it may have resulted according to "Hofstede's uncertainty avoidance dimension or other unexplored factors, such as language proficiency."⁴⁴

Hall's High-Context and Low-Context Culture Theory in the Classroom

As previously noted, Hall's High-Context and Low-Context Culture Theory remains relevant in the study of intercultural communication.⁴⁵ While studies from various disciplines, including conflict resolution,⁴⁶ humanitarianism,⁴⁷ and marketing,⁴⁸ have shown Hall's High-Context and Low-Context Culture Theory to be an accurate measure of cultural identity, surprisingly, there has been limited research on its effect in the classroom. Still, studies in the field of education support the conclusion that HC and LC cultural contexts do play a role in student performance and behavior.⁴⁹ By default, an online learning environment is a low-context medium, with nearly all meaning being conveyed by linguistic expression. However, many students enrolled in online courses come from high-context cultures, where meaning is typically formed through established social norms, non-verbal cues, and fixed interpersonal relationships.⁵⁰ This has considerable implications considering students from HC cultures studying in LC online learning environments have been found to disproportionately struggle and exhibit adverse educational

⁴² McLeay & Wesson, *Chinese versus UK marketing students...*

⁴³ Ibid., p. 5.

⁴⁴ Ibid., p. 5.

⁴⁵ Gunawardena, *Culture and online distance learning...*

⁴⁶ Croucher, S. M., Bruno, A., McGrath, P., Adams, C., McGahan, C., Suits, A., & Huckins, A., Conflict styles and high-low context cultures: A cross-cultural extension, "Communication Research Reports", 2012, pp. 64-73.

⁴⁷ Afrouzi, O., Humanitarian behavior across high-/low-context cultures: A comparative analysis between Switzerland and Colombia, "Journal of International Humanitarian Action", 2021, pp. 1-10.

⁴⁸ Hornikx, J., & le Pair, R., The influence of high-/low-context culture on perceived ad complexity and liking, "Journal of Global Marketing", 2017, pp. 228-237.

⁴⁹ Bozkurt, A., & Akbulut, Y., Dropout patterns and cultural context in online networked learning spaces, "Open Praxis", 2019, pp. 41-54; Gudykunst, W. B., Uncertainty reduction and predictability of behavior in low- and high-context cultures: An exploratory study, "Communication Quarterly", 1983, pp. 49-55; Yen, C.-J., & Tu, C.-H., Digital social presence in online learning: A study of online learning self-efficacy, satisfaction, and preference, "Educational Technology & Society", 2011, pp. 134-147.

⁵⁰ Westbrook, *Global contexts for learning...*

behaviors, including: limited participation; a preference for indirect over direct interactions with classmates and instructors; incorrect or incomplete assignment submissions; and attrition.⁵¹

In one case, researchers Bozkurt and Akbulut⁵² analyzed the drop-out patterns of 179 students enrolled in a MOOC course. Using Hall's High-Context Low-Context Culture Theory as a theoretical lens, the authors observed that students from HC contexts were more likely to drop the course compared to students from LC contexts. In another study, Yen and Tu⁵³ compared how students from diverse LC and HC cultures in an online university course self-perceived their digital social presence, defined by the researchers as the ability to project oneself socially and emotionally. An examination of the students in the online course (n = 295) revealed participants from LC and HC cultures regarded online social presence differently, with HC participants placing higher value on interactivity and the LC group emphasizing relationships.⁵⁴

Toward Cultural Accommodation in Online Learning

Ensuring fair cultural representation in education remains a timely and considerable challenge. The issue of equitable cultural representation in online learning is especially relevant given its rapid expansion since the COVID-19 pandemic. This black swan event has proven a defining moment for global education, with teachers and students alike now recognizing the merits of online learning. Yet, even with its undeniable benefits, increasingly multicultural and multilingual student bodies have exposed issues with cultural inclusivity within existing online learning designs. This has in turn raised the importance for online education providers to better understand how different educational values and cultural expectations impact student success in online learning.⁵⁵

Today most global e-learning systems are designed using Western, primarily Anglo-American pedagogical models, as a result of the combined influence of capital and pre-established physical and conceptual infrastructure.⁵⁶ However, this content is predominantly consumed by learners from non-Western cultural backgrounds.⁵⁷ Years ago, Frechette and colleagues observed that while students enrolled in online education are increasingly diverse, "the design and delivery of instruction often fails to account for differences in how students, think, communicate, and learn," leaving many students feeling "confused

⁵¹ Ibid.

⁵² Bozkurt & Akbulut, *Dropout patterns and cultural context...*

⁵³ Yen & Tu, *Digital social presence in online learning...*

⁵⁴ Ibid.

⁵⁵ Liu et al., *Cultural differences in online learning...*

⁵⁶ de Brito Neto et al., *E-learning in multicultural environments...*

⁵⁷ Coursera, 2024, *Coursera Learner Outcomes Report 2024*, Mountain View, CA: Coursera.

or disconnected.”⁵⁸ This contrast underscores the need for new models of online course design that consider cultural differences.⁵⁹

Towards Culturally Inclusive Instructional Design

Culturally Inclusive Instructional Design (CIID) is an educational approach that accommodates a wider audience of students by reflecting the cultural, linguistic, and religious diversity of students.⁶⁰ In doing so, CIID aims to build learning environments that are free from prejudice and discrimination. One framework for CIID in online learning environments is Gunawardena and colleagues’⁶¹ *Online Wisdom Communities* (WisCom), which emphasizes: (1) the influence of culture and context on learning; (2) the interconnectedness of social and individual learning processes; (3) the importance of social interaction and collaboration; (4) the power of knowledge co-construction; (5) the significance of “mentoring, scaffolding, guidance, and support to achieve the zone of proximal development;”⁶² and (6) the mediation of language, artifacts, and technology. The Wiscom framework thus provides course designers with a model for collaborative, inquiry-based classrooms that promotes learning across cultures, and in the process creates a sense of community. Hence, a Wiscom represents a reconceptualization of online learning design through a renewed emphasis on community, communication, technology, co-mentoring, and active learner support.

Utilizing the Wiscom framework, Gurjar and Bai⁶³ developed a measurement tool to assess CIID in online learning. The authors utilized the five dimensions of the CIID framework (Introspection, Intention, Interaction, Learner-Content Interaction, Learner-Instruction Interaction, and Learner-Learner Interaction) to create an item pool of 37 survey questions for K-12 and higher education educators. The authors of the study showed their scale as a reliable and valid measure of CIID, concluding it could help broaden the inclusion of CIID in online course design and promote the development of a Wiscom.

Culturally Responsive Online Course Design

Culturally responsive teaching (CRT) serves as another framework for promoting cultural inclusivity in online learning. By placing students’ cultural knowledge and prior experiences at the forefront of learning design, CRT has been proven to promote active learning engagement and improved educational outcomes. This

⁵⁸ Frechette et al., *How to design culturally inclusive online learning experiences...*, p. 2.

⁵⁹ Gurjar & Bai, *Assessing culturally inclusive instructional design...*; Yang et al., *Impact of cultural differences...*

⁶⁰ Multicultural Education (NSW Department of Education), *Cultural inclusion*, 2023.

⁶¹ Gunawardena, C. N., Frechette, C., & Layne, L., *Culturally inclusive instructional design: A framework and guide to building online wisdom communities*, Routledge, 2019.

⁶² *Ibid.*, p. 21.

⁶³ Gurjar & Bai, *Assessing culturally inclusive instructional design...*

in turn improves student performance across multiple measures of achievement.⁶⁴ When used effectively, CRT can effectively widen the Zone of Proximal Development because new content is scaffolded through culturally familiar contexts. This in turn permits a broadened margin of error for content rigor.⁶⁵ To be effective, course design for culturally responsive online courses should prioritize the various loci of course interaction: learner-content, learner-instructor, and learner-learner.⁶⁶

General Themes in Culturally Informed Online Pedagogy

With intentionality, it is possible to design online courses that serve the needs of all students. Factors such as course design, communication channels, frequency of contact, and self-regulated learning habits all statistically influence online learning outcomes.⁶⁷ This section will describe several practical guidelines for online course design.

Technological Literacy. Knowing how to navigate disruptions and other unforeseen complications is a key factor in online learning success.⁶⁸ However, digital literacy is frequently connected to one's upbringing, and particularly socioeconomic status. This gap in technological literacy and access is commonly termed the *digital divide*, with culturally and linguistically diverse students being disproportionately impacted.⁶⁹ When left unaddressed, the digital divide has the potential to delimit online learning outcomes. Therefore, instructors of online courses should evaluate students' prior experience with online learning and their technological literacy early in the course. Such knowledge can enable instructors to ensure that all students are prepared to access and engage course materials.

Providing Choice. Online learning designers should endeavor to present learners with versatile assignment completion options.⁷⁰ To illustrate, Kumi-Yeboah, Dogbey, and Yuan⁷¹ found that students whose first language was not English showed an aversion toward small-group collaborative online learning tasks, as they viewed these assignments as particularly challenging. Granting learners with greater autonomy over their learning tasks, such as by offering multiple modes of representation and expression or collaborative and solitary work options, could

⁶⁴ Gay, *Culturally responsive teaching*...

⁶⁵ Ibid.

⁶⁶ Gurjar & Bai, *Assessing culturally inclusive instructional design*...

⁶⁷ Cai, Q., Comite, U., & Tang, Y., *Interaction, self-regulated learning, and learning performance in online learning*, "International Journal of Emerging Technologies in Learning", 2023, pp. 214-228.

⁶⁸ Chau et al., *Impacts of online collaborative learning*...

⁶⁹ Deng, X., & El Hag, S., Digital inequality and two levels of the digital divide in online learning: A mixed methods study of underserved college students, "Journal of Information Systems Education", 2024, pp. 377-389.

⁷⁰ Gurjar & Bai, *Assessing culturally inclusive instructional design*...

⁷¹ Kumi-Yeboah et al., *Online collaborative learning activities*...

be one way to support students from different cultural backgrounds.⁷² Still, the merits of students completing a variety of assignments must be acknowledged. Indeed, scholars argue that collaborative opportunities in online courses are important and should not be immediately dismissed.⁷³ For instance, Chau, Bui, and Dinh⁷⁴ found that collaboration in online learning environments reduced students' intercultural communication apprehension and enhanced intercultural communicative competence. In consideration of the wide diversity in learner profiles, Liu and colleagues⁷⁵ recommended a set of course strategies to address intercultural differences that can be viewed below in Table 2.

Table 2. Summary of Cultural Themes

Dimensions	Cultural Differences	Suggestions for Course Design
Assessment	Exam-oriented vs. process-oriented; Memorization vs. application	Multiple assessment strategies; Structured and flexible assignment schedule
Instruction/Interaction	Lecture vs. conversation; Structured vs. less structured; Deductive vs. inductive (case-based learning)	Incorporate features that accommodate different cultural pedagogy
Asynchronous /Synchronous Communication	Lack of visual cues caused communication barriers in asynchronous communication; Scheduling issue for cross-cultural collaboration in synchronous communication; Time zone differences	Balanced use of asynchronous and synchronous communication
Collaboration	Collectivism and masculinity vs. individualism and femininity; Culture differences visible, but did not negatively affect collaboration	Appreciate cultural differences
Case Learning	Lack of global cases; Lack of a relationship between U.S. case discussion and analysis and local issues of international students; Lack of international experience in regard to the online instructors	Balance the use of local and global cases; Provide more context for culturally specific examples or cases
Academic Conduct	Discrepancies between U.S. and other countries' rules of academic conduct	More education and understanding, rather than pure punishment
Language	Language barriers in reading, writing and communication	More planning and preparation; More audio/visual aids

Note. Reprinted from: Liu, X., Liu, S., Lee, S., & Magjuka, R. J., *Cultural differences in online learning: International student perceptions*, "Educational Technology & Society", 2010, pp. 177-188

⁷² Gurjar & Bai, *Assessing culturally inclusive instructional design...*

⁷³ Arkoudis, S., Watty, K., Baik, C., Yu, X., Borland, H., Chang, S., & Pearce, A., *Finding common ground: Enhancing interaction between domestic and international students in higher education*, "Teaching in Higher Education", 2012, pp. 222–235; Martin, F., & Bolliger, D. U., *Engagement matters: Student perceptions on the importance of engagement strategies in the online learning environment*, "Online Learning", 2018, pp. 205-222.

⁷⁴ Chau et al., *Impacts of online collaborative learning...*

⁷⁵ Liu et al., *Cultural differences in online learning...*

Social Interaction. Social interaction plays an important role in student engagement and motivation.⁷⁶ Still, it is common for online courses to insufficiently promote meaningful interaction. Arkoudis and colleagues⁷⁷ noted multilingual and multicultural students tend to have lower interaction rates than their peers. To address this, the authors created an *Interaction for Learning Framework* (ILF) that facilitates interaction opportunities in online courses. The ILF proposes six major themes: “planning for interaction; creating environments for interaction; supporting interaction; engaging with subject knowledge; developing reflexive processes; [and] fostering communities of learners.”⁷⁸ These suggestions provide online course designers with a pragmatic framework for encouraging authentic interaction between students and instructors. In all, meaningful interaction is a critical sociocultural component of the learning process as it enables students to share their worldviews and hear the differing perspectives of others.⁷⁹

Conclusion

Over the past two decades, online learning has become a fixed feature of the modern educational landscape. While online learning has undeniably increased global access to high-quality education, much of today’s digital learning content contains an inherent Western cultural bias, which disadvantages students from non-Western cultures. This review argues that online learning designers must address this mismatch through intentional course design. This study was guided by the questions below:

1. How can students’ cultural backgrounds be accurately assessed and defined?
2. How can insights into students’ cultural backgrounds inform online course design?
3. How can online course design be purposely adapted to promote cultural inclusivity?

As shown by the literature, culture shapes learning, and effective course design requires acknowledging students’ cultural diversity. This review recommends approaches to online course design that are grounded in Culturally Inclusive Instructional Design and Culturally Responsive Teaching. In all, effective online courses should incorporate meaningful interactions between diverse learners while also recognizing students’ cultural differences in technological literacy and learning style preferences.

⁷⁶ Martin & Bolliger, *Engagement matters...*

⁷⁷ Arkoudis et al., *Finding common ground...*

⁷⁸ Ibid., p. 227.

⁷⁹ Arkoudis et al., *Finding common ground...*; Martin & Bolliger, *Engagement matters...*

Recommendations

Based on the literature, there are specific, implementable actions that online learning providers should undertake. First, students' cultural profiles should be assessed using Hofstede's Cultural Dimensions Theory and Hall's High-Context Low-Context Theory. This provides a helpful theoretical framework for assessing perceived group and individual cultural identification. Providers should then identify patterns among students and apply this knowledge to assignments, assessments, and overall course design. This cultural knowledge would provide invaluable information when planning new course materials or revising existing ones. Comparative analysis of student preferences and self-identified cultural traits could also improve curriculum quality. It would also enable designers to identify findings from similar studies that can be tested and replicated. To assess the efficacy, student achievement of learning objectives and feedback could be compared with data from previous semesters and prior studies. This would allow for micro-analysis of different cultural groups or dimensions.

Directions for Future Research Studies

Future research should focus on further developing reliable instruments to assess CIID and CRT in online courses. It would be particularly useful to develop a measure of cross-cultural online learning design similar to that of the Bechdel Test used in media studies, which measures gender representation. Existing tools are too complex for practical application by most educators.

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OUTDOOR EDUCATION IN FOREIGN LANGUAGE TEACHING

Abstract: Outdoor education, an approach that takes students beyond the traditional classroom and immerses them in nature, is increasingly being recognized as an innovative teaching method worldwide. This experiential learning model has gained traction in various educational systems, incorporating outdoor activities such as field trips, camping, and nature-based lessons into the curriculum. In Poland, outdoor education is being integrated into schools to foster a deeper connection between students and the natural environment.

This method has shown particular promise in foreign language teaching, providing students with an authentic, engaging context to develop language skills. By learning in natural settings, students are able to practice language in real-world scenarios, enhancing both their linguistic and cultural competencies. The research will explore the effectiveness of outdoor education in improving foreign language acquisition, focusing on student engagement, motivation, and overall academic performance. Preliminary findings suggest that students exhibit higher levels of enthusiasm when participating in outdoor lessons, leading to increased retention and a stronger connection to the material. Moreover, the natural environment fosters collaboration and communication, further enriching the language-learning experience. In this article, the analysis of such an approach will be presented, highlighting its potential as a transformative tool in foreign language teaching.

Keywords: outdoor learning, experiential learning, hands-on learning, innovations.

Streszczenie: Edukacja na świeżym powietrzu, podejście, które zabiera uczniów poza tradycyjną klasę i zanurza ich w naturze, jest coraz częściej uznawane za innowacyjną metodę nauczania na całym świecie. Ten model uczenia się przez doświadczenie zyskał popularność w różnych systemach edukacyjnych, włączając do programu nauczania zajęcia poza salą lekcyjną, takie jak wycieczki terenowe, biwakowanie i lekcje oparte na kontakcie z naturą. W Polsce edukacja na świeżym powietrzu jest integrowana ze szkołami, aby wspierać głębszą więź między uczniami a środowiskiem naturalnym. Ta metoda okazała się szczególnie obiecująca

w nauczaniu języków obcych, zapewniając uczniom autentyczny, angażujący kontekst do rozwijania umiejętności językowych. Ucząc się w otoczeniu naturalnym, uczniowie są w stanie ćwiczyć język w scenariuszach z życia wziętych, wzmacniając zarówno swoje kompetencje językowe, jak i kulturowe. Przeprowadzone badania będą eksplorować skuteczność edukacji na świeżym powietrzu w poprawie przyswajania języków obcych, koncentrując się na zaangażowaniu uczniów, motywacji i ogólnych wynikach w nauce. Wstępne ustalenia sugerują, że uczniowie wykazują wyższy poziom entuzjazmu podczas uczestnictwa w lekcjach na świeżym powietrzu, co prowadzi do zwiększonego zapamiętywania i silniejszego związku z materiałem. Ponadto środowisko naturalne sprzyja współpracy i komunikacji, dodatkowo wzbogacając doświadczenie nauki języka. W artykule tym przedstawiona zostanie analiza tego podejścia, podkreślając jego potencjał jako narzędzia transformacyjnego w nauczaniu języków obcych.

Słowa kluczowe: nauczanie na świeżym powietrzu, nauczanie empiryczne, nauka praktyczna, innowacje.

Introduction

Outdoor education is a transformative teaching method that is growing in popularity worldwide. It has been analysed repeatedly, resulting in many currents and interpretations. These variations depend on factors such as local realities and education systems, which vary depending on country and region. The emphasis on *outdoor education* differs according to the subjects and teaching content. This article will address *outdoor education* as a transformative method in foreign language teaching, enhancing student engagement and motivation while facilitating language learning in real-life contexts. What is outdoor education?

Outdoor education is an approach that utilises the natural environment to enhance learning experiences. It is an excellent space for learning and gaining knowledge. The hands-on learning makes the teaching content sink into students' memories for years to come. It has numerous developmental and learning benefits. *Outdoor education* can be defined as the design, transfer and implementation of the development process in the natural environment¹. It is "*the organised effort of learning or studying biotic and abiotic aspects of the environment in an outdoor setting that is free of anthropogenic impacts*"². *Outdoor education* is a transformative approach to learning that blends the natural world with educational objectives. It aims at the holistic development of students, making learning more engaging and helping students connect with the environment.

¹ J. Luckner, R. Nadler, Processing the Experience: Enhancing and Generalizing Learning, 1997, p. 269.

² W. T. Fang, A. Hassan, B.A. LePage, Outdoor Education, In: *The Living Environmental Education. Sustainable Development Goals Series*, Singapore: Springer, 2023, p. 229. DOI:10.1007/978-981-19-4234-1.

What is more, one key element of *outdoor education* is learning by doing. It involves engaging students in various tasks and allowing them to practice their knowledge and skills in a real-world context. It allows students to understand the content deeply and absorb it better. Students also develop key competencies such as critical thinking, problem-solving and social skills³. By engaging in outdoor activities, students develop interpersonal skills, improving communication and teamwork. They also practise sharing team roles and responsibilities and developing leadership skills.

Furthermore, outdoor education “*promotes the complex interrelationships between human culture and ecosystems*”⁴. Students immerse themselves in culture, which has an inseparable relationship with language, which makes outdoor education a perfect strategy for teaching a foreign language. The teacher may utilize this method to build students’ cultural awareness and encourage them to develop language skills. Outdoor education aims at the holistic development of individuals, which occurs most effectively in the group and using the natural environment while overcoming emerging obstacles⁵.

Experiential Education

At the core of *outdoor education* is experiential education, one of the overarching currents in teaching. Its origins can be traced to John Dewey’s seminal work *Experience and Education*⁶. He is regarded as one of the founders of pragmatism. In his work, the author pointed to the extraordinary role of experience in the learning process and the development of individuals. This process occurs through the accumulation and exchange of experiences, through which people gain knowledge of their surroundings and learn about themselves⁷.

Nevertheless, not every experience is educative; some may be mids-educative⁸. Therefore, skilled teacher guidance is essential for experiential learning to have practical value for students. A well-prepared lesson plan and clear objectives are vital for a successful outdoor lesson. It is not only about gaining new experiences, but also about learning from them. In this way, learners enhance their knowledge

³ I. A. Neville, L. A. Petrass, & F. Ben, *Cross disciplinary teaching: a pedagogical model to support teachers in the development and implementation of outdoor learning opportunities*, “Journal of Outdoor and Environmental Education”, New York, 2022, p. 5.

⁴ W. T. Fang, A. Hassan, B.A. LePage, Outdoor Education, In: *The Living Environmental Education, Sustainable Development Goals Series*, Singapore: Springer, 2023, p. 229. DOI:10.1007/978-981-19-4234-1.

⁵ A. Leśny, *Uczenie, rozwój, czy wychowanie plenerowe? Niuanse koncepcji outdoor education*, In: “Meritum. Mazowiecki Kwartalnik Edukacyjny” 2(69), Warszawa, 2023, p. 3.

⁶ J. Dewey, *Experience & Education: the 60th anniversary Edition*, New York: Kappa Delta Pi, 1997.

⁷ See: W. Okoń, *Wprowadzenie do dydaktyk ogólnej*, Wydanie piąte, Warszawa, 2023, p. 3.

⁸ J. Dewey, *Experience & Education: the 60th anniversary Edition*, New York, 1997, p. 23.

and skills, build their value system and broaden their worldview⁹. The teacher's role as a guide and mentor is significant in this process. While performing the tasks, students shape their behaviour and attitudes. Knowledge transfer is crucial for achieving the intended outcome. After drawing appropriate conclusions, students formulate demands, form their own beliefs, and expand their knowledge and skills. To achieve this, teachers use various teaching techniques and methods, including *outdoor education*.

Students are actively involved in the environment and exchange their experiences to benefit from this type of education. David A. Kolb has extensively described this teaching method. He identified four stages in the experiential learning process: "*concrete experience (doing), reflective observation (observing), abstract conceptualisation (thinking), and active experimentation (planning)*"¹⁰. Experiential learning is recognised as one of the most effective pedagogical methods. Learners can build their knowledge based on personal conclusions drawn from past experiences. They accept this knowledge as their own. The teacher should skilfully guide the learning process, supporting the learners in drawing valid conclusions and using appropriately prepared instructional materials. The advantage of this method over spoon-fed teaching content is that it engages learners' emotions and develops their ability to analyse their own and others' experiences, improving problem-solving and critical thinking.

One aspect of experiential education is developing students' reflective and critical thinking skills. It is essential to learn from experience consistently. Students have the opportunity to analyse their actions, behaviour, and consequences. By carrying out such self-analysis, they develop and improve themselves. By doing so, they also understand the need for continuous growth. When learners become emotionally involved in their tasks, learning becomes enjoyable and the process more meaningful. This way, the teaching process will be remembered and recognised as a positive experience.

The Potential and Challenges of Outdoor Education

According to social learning theory, learning is a social process. The theory "*is the most mentioned theory in understanding people's learning process. This theory mainly explains the learning process of individuals in a social environment. In a social environment, individuals can learn through imitation, observation, and modelling*"¹¹. Positive encouragement and social interaction

⁹ J. Luckner, R. Nadler, *Processing the Experience: Enhancing and Generalizing Learning*, Dubuque, 1997, p. 269.

¹⁰ F. Abakah, A. Antwi, *Using experiential learning in solving 3-dimensional problems in trigonometry*, "Gulf Journal of Mathematics" 16(2), 20024, <https://doi.org/10.56947/gjom.v16i2.1817>, p. 367.

¹¹ J. Yugan, *Development and application of social learning theory*. "Learning & Education" 10(7), 2022, <https://doi.org/10.18282/l-e.v10i7.3002>, 183.

are essential for human development and practical learning. Students observe the patterns provided and reproduce them in social situations. A safe environment is crucial for effective learning. In *outdoor education*, building relations within the school community may be encouraged by environmental activities. Teachers may stimulate students to participate in the lesson more eagerly, which can positively change their attitude toward learning. It may be an opportunity to set students' academic goals and encourage further development.

In *outdoor education*, nature is a vital backdrop and inspiration for learning. The objective is the development of the students as individuals, which occurs most effectively when doing activities in a group. Skilful use of the outdoors is crucial. In order for learners to evolve, the teacher should consciously introduce an element of risk when employing this method. The entire group may take social and emotional risks, for instance, by exploring the environment. In this way, students will become more involved and engaged in the lesson. The aim of *outdoor education* is not only to provide knowledge about the environment but also to shape and improve soft skills such as developing and discovering talents, skilful use of resources, finding unique solutions to problem, as well as practising skilful communication and teamwork¹². To achieve this, teachers utilise a variety of activities and tasks, including team games, excursions or expeditions. Nonetheless, *outdoor education* is more than exploration. Each activity has a clear educational objective. The learning process is guided by the teacher, who plans the experience appropriately so that the learners have the opportunity to analyse the situation, reflect on it and learn from the experience. It is essential to competently discuss activities, tasks, and experiences with students, ensuring that knowledge is effectively integrated into their everyday lives.

Nevertheless, outdoor education involves many challenges, and implementing this approach in formal education may be difficult. *Outdoor education* is primarily developing as an alternative form of education. Nonetheless, incorporating this teaching method into formal education is beneficial despite the difficulties. One of them is limited time. In the Polish education system, a school lesson lasts 45 minutes, which is often insufficient time for outdoor activities. Conducting the planned task, discussing it and analysing the conclusions may take longer. Nonetheless, teachers may use the school grounds to conduct lessons outside the traditional classroom. They provide an attractive variety for the students, which makes them more engaged in the activities proposed by the teacher.

Furthermore, time management is also a challenge for teachers. Flexibility is needed when conducting outdoor activities or games, and the timing of each task may vary from group to group¹³. In addition, teachers also have to balance the

¹² A. Leśny, *Uczenie, rozwój, czy wychowanie plenerowe? Niuanse koncepcji outdoor education*, In: "Meritum. Mazowiecki Kwartalnik Edukacyjny" 2(69), Warszawa, 2023, p. 4.

¹³ P. H. Torkos, & P. A. M. Egerão, *Managing Time in Classroom and During Outdoor*

demands of the curriculum with the opportunities and logistical needs of outdoor learning. Safety issues in the outdoor environment are also fundamental. Teachers must devote time and attention to group safety issues when carrying out activities in an environment different from the usual one, which may be stressful.

Moreover, many teachers feel unprepared to teach effectively in an outdoor environment. Appropriate teaching strategies must be applied to the dynamic nature of experiential learning to enhance learning outcomes¹⁴. A lack of sufficient teacher training in this area may discourage educators from taking on the challenges of *outdoor education* and moving beyond the traditional classroom. In addition, teachers may find it difficult to evaluate students' educational achievements during outdoor activities. Traditional methods of assessing learners may not be appropriate for outdoor teaching, making students' progress appear immeasurable and challenging to document. Nonetheless, it does not mean that outdoor learning is less valuable. It does, however, require adequate planning and preparation on the part of the teacher, along with appropriate training.

Outdoor Education In Foreign Language Teaching

Outdoor education is an effective method of teaching a foreign language. This pedagogical method blends experiential learning in the natural environment with language acquisition. Learners acquire knowledge about everyday life and improve their communication skills in a foreign language. In addition, students expand their cultural awareness and multicultural competencies. Outdoor activities foster the development of learners' language skills as well as their motivation for linguistic and personal growth.

Moreover, classes in a natural environment help to build students' motivation to learn the language. Active participation in lessons and engagement are essential for developing communication skills in a foreign language¹⁵. Interactive methods, such as role-play and group activities in a natural setting, increase students' motivation and speaking skills. Such teaching methods aim to develop students' creativity and ability to process information and respond quickly. Consequently, it has a positive impact on communication skills. Moreover, in experiential education, the teacher planning the experience puts the students in a situation where

Education, at Core Procurement Cycle, "ANUSANDHAN – NDIM's Journal of Business and Management Research", 3(2), 2022, pp. 34-40, <https://doi.org/10.56411/anusandhan.2021.v3i2.34-40>, 36-39.

¹⁴ N. Evans, and R. Acton, *Narratives of teaching in outdoor and environmental education: what can we learn from a case study of outdoor education pedagogy?* "Journal of Adventure Education and Outdoor Learning", 22 (3), 2021, pp. 216-220.

¹⁵ L. Zablotska, V. Meleshchenko, & L. Chernii, *Foreign language teaching using interactive technologies at higher education establishments*, "Pedagogical Sciences" <https://doi.org/10.31651/2524-2660-2022-3-10-20>, 2020, p. 47.

they practise their language skills in a real-world context. Thereby, teachers reinforce the learning process.

What is more, technology and various learning tools and platforms can be effectively used in outdoor lessons. They have positive effects and increase student motivation and engagement. Multimedia and educational platforms can assist in planning activities and provide engaging ways for students to learn languages¹⁶. They give teachers access to a wealth of resources beyond the classroom and encourage students to take charge of their learning. This self-directed approach fosters a sense of responsibility for their language development.

Outdoor education is a multifaceted approach that supports language learning, fosters communication, and helps students develop their speaking skills. It also provides many opportunities to practice language in a real-world context. In addition, it positively affects the students' engagement in learning and motivation for linguistic development.

Benefits of Outdoor Education

Outdoor education fosters the development of soft skills, which are essential to function in both personal and professional life. This method helps develop students' negotiation and communication skills and helps build trust and cooperation in a group. Students learn to manage resources and look for non-standard solutions to problems that arise. Moreover, outdoor activities positively impact physical and mental health. Not only does this increase the learners' physical fitness but it also reduces their stress levels, which are often higher among students when learning in a traditional classroom. It also has a positive psychological and social impact, helping build self-esteem and resilience¹⁷.

In addition to this, learning in the natural environment improves cognitive functioning and academic performance. Outdoor activities increase students' motivation, encourage proper behaviour, reduce classroom management issues, and improve standardised test results¹⁸. It is also a perfect teaching method to enhance student engagement and increase motivation. Learning by doing is an excellent opportunity for teachers to foster positive attitudes and values among students, instilling in students a sense of community and responsibility. Immersing in nature

¹⁶ N. V. Martyushev, A. Shutaleva, E. Malushko, Z. Nikonova & I. Савченко, *Online communication tools in teaching foreign languages for education sustainability*. Sustainability, <https://doi.org/10.3390/su131911127>, 2021, p. 13.

¹⁷ R. Kroufek, K. Nepraš, J. Musil & L. Filipová, *Effect of outdoor education and stay in nature on pupils' physical and psychical health*, Czech Republic; "Ústí nad Labem: EduPort" 5(2), 2021, ISSN 2695-0935, pp. 36-38.

¹⁸ E. Fägerstam, *High school teachers' experience of the educational potential of outdoor teaching and learning*, In: "Journal of Adventure Education and Outdoor Learning", 14(1), 2013, pp. 56-81. <https://doi.org/10.1080/14729679.2013.769887>, p. 59.

and culture can broaden students' worldviews and appreciation for nature and the environment.

Solving mysteries with Sherlock Holmes

Nowadays, various methods of increasing engagement and stimulating students to develop and learn effectively are employed in education. A practical approach is to extend learning beyond the confines of the traditional classroom. The research outlined below shows significant student engagement in outdoor activities. The lesson's theme was solving mysteries with the famous detective Sherlock Holmes. Learners participated in an outdoor game, practising their language and communication skills, as well as improving teamwork and problem-solving. All teaching materials used were designed and created by the author. The lesson plan implemented during the conducted research is detailed below.

Methodology

The research employed a qualitative approach, combining three methods of data collection: participant observation, teachers' field notes, and semi-structured interviews with students. During the conducted lessons, the teacher observed the students, their engagement in the tasks, the difficulties they encountered, and how they coped with the challenges. What is more, the author observed the interactions between the learners, their cooperation and communication, taking detailed notes to document the course of the lessons. In addition, short interviews (5-10 minutes) were conducted in each group participating in the study, during which the students shared their reflections and feelings about the outdoor activities. The collected data was carefully analysed to obtain a more complete picture of how field education influenced student participation and the foreign language learning process.

Group profile

The lesson presented in this research paper is designed for secondary school students and was conducted with 10 groups of 1st-grade learners, each containing 12 students – boys and girls. All students presented a similar level of language and communication skills, high cultural awareness, and eagerness to learn.

All groups major in English, and most students partake in extracurricular activities. The learners showed significant interest in British culture and literature, particularly in Sherlock Holmes narratives. They were familiar with the character of a famous detective from movies and popular TV series. It could have been observed that most learners are visual and kinaesthetic learners, which made the outdoor activities the ideal complement to the learning process. Various activities were designed to accommodate different learning styles. The main objective was to motivate students and increase their engagement, and the goal was achieved.

Students demonstrated extensive vocabulary knowledge, reading comprehension, puzzle-solving, and deduction skills. They proved to be perceptive and inquisitive, interested in the lesson topics. The nature of the outdoor activities made the class

atmosphere enjoyable, and the learners met the activities planned by the teacher with great enthusiasm. The students are using *Student's Book* entitled *High Note 3* by Bob Hastings, Daniel Brayshaw, Lynda Edwards & Rod Fricker, as well as *Workbook High Note 3* by Jane Bowie, Lynda Edwards, Rod Fricker & Joanna Sosnowska. They are familiar with tenses and grammatical constructions at a satisfactory level, thanks to which they coped well with a task involving such knowledge. The results of observation show that all students possess well-developed soft skills. It could have been observed that learners have good relationships with each other and are focused on building connections within the group. Most of the students were open and energetic. Some individuals were shy and withdrawn, requiring additional support from the teacher. Nevertheless, the rest of the group treated them well and included them in conversations, encouraging participation. One could see a positive atmosphere and mutual respect in the group.

The activities planned for students were designed to explore the full potential of outdoor education. The pleasant weather and surrounding green areas created an unforgettable atmosphere. Outdoor conditions made it possible to carry out engaging tasks that could not take place in a traditional classroom. The activities were a pleasant and unusual challenge for the learners, making them eager to get involved.

Overall, the students had a very positive attitude toward the outdoor lesson. They enjoyed it and were motivated to complete specific tasks. Engagement increased significantly, and both energetic and shy learners participated in the activities planned by the teacher.

LESSON PLAN

Age of students: 16 years old

Number of students: 12

Level of proficiency: intermediate

Subject: Solving mysteries with Sherlock Holmes – outdoor activities.

Materials: cards, envelopes, pens, mobile phones, *The letter to Sherlock Holmes* (Appendix 1), *The checklist of Sherlock Holmes* (Appendix 2), *The quiz about Sherlock Holmes* (Appendix 3).

Aims for the teacher:

- to develop students' ability of problem-solving,
- to engage students in the lesson,
- to encourage students' creativity.

Aims for the students:

- to practise communication skills,
- to improve social skills and teamwork,
- to reinforce crime-related vocabulary,
- to practice grammar.

LESSON STAGE	ACTIVITY	AIMS	PROCEDURE	TIME
WARM UP	Guess the topic	- to greet students, - to arouse students' curiosity - to engage students in the lesson.	Teacher greets the students and asks them to guess what the lesson will be about. The teacher gives students hints (the lesson will be about a well-known character from a series of books. He lives in London and is a famous detective). Learners are to guess the lesson's topic.	3 minutes
PRESENTATION	A letter to Sherlock Holmes	- to engage learners in the lesson, - to explain the rules, - to familiarise students with the story of theft included in the letter.	Students read the letter to Sherlock Holmes (Appendix 1) and find out the mystery they will be solving. Teacher shows the students a card with the list of suspects, reasons, and places while explaining the game rules to them.	6 minutes
PRACTICE	A search of the envelopes	- to develop students' spatial orientations, - to encourage students to participate actively in the lesson, - to strengthen cooperation in groups.	Teacher hides envelopes with special roles and divides students into groups. The students are to find the envelopes hidden in their surroundings.	5 minutes
	Collecting evidence	- to enhance students' perceptiveness, - to develop social skills, - to motivate students, - to encourage students' creativity.	The students are to find items from the checklist (Appendix 2) such as trees, birds, flowers etc. and take photos of them. After the activity is finished, the teacher gives each team three clues needed to solve the case.	10 minutes
	Quiz	- to reinforce students' literature knowledge, - to develop the ability to search for specific information, - to improve the selection of information.	Students are to do a quiz about Sherlock Holmes. They may use the Internet to search for information. After completing the quiz (Appendix 3), the learners get two clues. The group with the highest score will get an extra clue.	5 minutes
	A relay race	- to encourage physical exercise, - to practice the usage of Past Simple and Past Continuous, - to improve teamwork, - to motivate students.	Students are to take part in a relay race. One person runs to Teacher and answers the question. The student can run back to the team if the answer is correct. If not, the learner is to turn around three times and retry. After the raise, Teacher gives three clues to each group. The fastest team gets one extra clue.	7 minutes
PRODUCTION	Solve the case	- to practise speaking skills, - to improve the ability of problem-solving, - to practise communication skills.	Students are to gather and analyze information. They may share the clues between groups and use their special cards. Students are to present their conclusions with Teacher.	5 minutes
EVALUATION	Evaluation	- to summarise the lesson, - to prize active students, - to get feedback about the lesson.	Teacher summarizes the lesson and provides students with the correct solution to the mystery. After that, Teacher says goodbye to the learners.	4 minutes

Dear Mr Holmes,

My name is Lucy Bennet, and I live in a humble home in the suburbs. As a widow leading a simple life, I never expected to be tangled in a mystery. However, I woke up yesterday morning to a painful discovery: my empty jewellery box.

Seeking help from my long-time friend, who happens to be the police chief, turned out to be useless. Despite his best efforts, no clues were found, leaving me uncertain. Rumours spread quickly, leading to suspicion among neighbours. I find myself unsure of whom to trust. Hence, I ask you, Mr Holmes, to share your intelligent thoughts and observations. Please help me solve this mystery and find the thief who stole my beloved possessions.

*Yours sincerely,
Ms Bennet*

Appendix 1: The letter to Sherlock Holmes

Sherlock Holmes Observation

Exercise: Describing Your Outdoor Environment

Below are items to observe in your outdoor environment. Go outside and carefully observe your surroundings. Check off each item as you notice it.

- ☐ Trees
- ☐ Flowers
- ☐ Birds
- ☐ Insects
- ☐ Sky (clouds, sun, moon, stars)
- ☐ People (if any)
- ☐ Buildings or structures
- ☐ Sounds (birds chirping, wind rustling leaves, etc.)
- ☐ Smells (flowers, grass, etc.)
- ☐ Other notable details (weather, colours, etc.)

Appendix 2: The checklist of Sherlock Holmes

1. What is the address of Sherlock Holmes and Dr. Watson's apartment?	5. Who is Sherlock Holmes' nemesis?
○ 221 B Bakery Street ○ 221 B Baker Street ○ 221 A Bakery Street ○ 222 B Baker Street	○ Professor Moriarty ○ Colonel Sebastian Moran ○ Inspector Lestrade ○ Irene Adler
2. What is Dr. Watson's first name?	6. What is the title of the first Sherlock Holmes story?
○ James ○ John ○ Henry ○ William	○ "The Adventure of the Speckled Band" ○ "The Hound of the Baskervilles" ○ "The Sign of Four"
3. What is the name of Sherlock Holmes' landlady?	7. What is the name of the detective agency that Homes and Watson form together?
○ Mrs Hudson ○ Mrs. Wilson ○ Mrs. Doyle ○ Mrs. Smith	○ Holmes & Watson Detective Agency ○ Baker Street Detectives ○ The London Investigative Bureau ○ There is no official name
4. What is Dr. Watson's military background?	8. What is the name of Dr. Watson's wife?
○ Royal Navy ○ British Army ○ Royal Air Force ○ Royal Marines	○ Mary ○ Martha ○ Margaret ○ Mabel
9. Who wrote the original Sherlock Holmes stories?	
○ Agatha Christie ○ Arthur Conan Doyle ○ Dashiell Hammett ○ Edgar Allan Poe	

Appendix 3: *The quiz about Sherlock Holmes*

Post-lesson evaluation

During the research, lessons were carried out in 10 groups. The warm-up included encouraging students to guess the topic. Most groups quickly assumed that the lesson would be about Sherlock Holmes. Although most learners were familiar with Conan Doyle's canon, some were initially surprised by the subject. The warm-up aimed to arouse students' curiosity, which was achieved.

In the presentation stage, the teacher used *The letter to Sherlock Holmes* to familiarise students with the theft story and explain the rules. The learners participated actively in the presentation by reading the letter. They were engaged in a discussion with the teacher and asked multiple questions. At this stage, most groups were excited by the outdoor game; however, several learners needed additional instructions to understand the game's rules. The teacher introduced new vocabulary in the letter and clarified all the concerns.

The practice stage contained four activities, which led students to solve the mystery. The teacher provided groups with clues after every activity. The first task was to find envelopes hidden outdoors. The learners showed involvement in the task, practising their perceptivity. Nine of the ten groups coped with the task themselves,

but one group needed teachers' directions to find the envelopes. The activity generated a lot of excitement among students and motivated them to solve the mystery. The next task was to find and take photos of items from the checklist, which was met with enthusiasm. Students demonstrated creativity, ingenuity, motivation, and commitment to the task while attentively interpreting various clues outdoors, enhancing their observation skills and spatial orientation. They also practised collaboration in groups and improved their social skills. Each group presented their unique ideas; learners took pictures of themselves with the beautiful plants, trees and birds. They were recording videos of sounds emerging in the natural environment. This exercise involved combining technology with outdoor activities, with sensational results. Students were fully engaged in the task, sometimes losing track of time.

The next activity was to complete the quiz about Sherlock Holmes. The students could use their knowledge of literature or search for information on the Internet. This task aimed at developing the ability to do research and select data. The learners appeared to have well-developed IT skills and quickly coped with the exercise. It could have been observed that all the students were fully engaged in teamwork. Most groups had considerable knowledge of Sherlock Holmes from well-known films and TV series, but some said they had read Conan Doyle's novels, which was evident in their responses. Nonetheless, most groups used the Internet because their own literary knowledge was insufficient to complete the quiz. Most groups achieved a high score due to their strong skills in searching for and verifying information. The next activity was a relay race, which encouraged physical exercise among students. The learners were supposed to run in teams and answer grammar questions. Some of them did not want to participate in the activity, but after encouragement from the teacher, they decided to participate. Most of the groups coped well with the questions asked by the teacher, and the unique form of the task (a race) aroused healthy competition and a desire to excel, which further helped to engage the students in the lesson and increase their motivation. The task also aimed at strengthening teamwork, and the goal was achieved.

In the production stage, students presented the results of their investigation. They used their special cards to get more information. All groups coped well with the task, and most solved the riddle entirely. The teacher's disclosure of a mystery generated a lot of excitement among students and sparked conversations. They improved their logical thinking and drawing conclusions. The learners also dived into British culture based on the canon of Sherlock Holmes.

The lesson ended with the evaluation. The teacher summarised the lesson and praised active students. Most students enjoyed the lesson and expressed their appreciation. Overall, the learners were satisfied, gained valuable knowledge, enhanced cultural awareness, and improved key competencies.

Final Conclusions

The research included in this article aimed to explore outdoor education as an innovative teaching method and evaluate its impact on secondary school students. The main objective was to examine the level of learner engagement in outdoor activities and the effect of this approach on the learning process. Furthermore, the study aimed to better understand the teacher's role as a guide in experiential learning, increasing students' cultural and literary awareness, and evaluating outdoor education as an innovative teaching method.

Findings show that outdoor education is a perfect method to increase engagement among secondary school students. After conducting several lessons, it could have been observed that the learners had a positive attitude towards outdoor activities and were eager to perform the tasks prepared by the teacher, showing great creativity and commitment. Moreover, outdoor activities provided an excellent opportunity to practice communicating in a foreign language within a real-life context while enjoying a positive atmosphere outdoors. Such activities are conducive to a positive atmosphere and have been proven to reduce students' stress. The results show that outdoor education is an effective teaching method and an excellent approach to teaching a foreign language. It is particularly effective in improving students' soft skills, such as teamwork, task assignment, and leadership. Outdoor activities are also a promising approach for kinaesthetic learners, generating overall excitement and enjoyment among students.

In conclusion, the results show that outdoor education is an excellent approach to learning. It is a vital complement to the learning process, enhancing learners' engagement in lessons and developing soft skills. This method is also a unique tool for foreign language teachers as an unforgettable experience for their students. By preparing outdoor activities, they can create a pleasant and stress-free atmosphere, encouraging students to speak a foreign language without the fear of making mistakes, thereby aiding in developing their communication skills and language proficiency. The results of the research indicate that the outdoor lessons were positively received by most students. The teacher's observations and notes revealed a high level of engagement and cooperation – students actively participated in group tasks and willingly used English in authentic contexts. Information obtained from post-lesson interviews confirmed these findings: students said that outdoor activities increased their motivation and made communication in English more natural and enjoyable. The learners particularly appreciated the opportunity to work in teams, which they described as engaging and supportive.



Picture 1-4: *The photographs from the lessons (own resources)*

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SELECTED ONLINE AI TOOLS IN DEVELOPING PRODUCTIVE SKILLS DURING THE DIDACTICS OF TEACHING ENGLISH¹

Abstract: The article presents a descriptive and reflective analysis of selected online tools incorporating artificial intelligence (AI), which have proven useful in developing productive language skills, i.e. speaking and writing, among future primary school teachers. Drawing on classroom experiences from the Didactics of Teaching English courses at the University of Radom (Poland) and the University of Oviedo (Spain), the authors illustrate how AI-based applications such as *Voki*, *Flipgrid*, *Five Cards Flickr Stories*, and a meme generator were used by student teachers to create engaging and pedagogically sound activities. Rather than conducting an empirical study with data collection, this article offers a practice-based account of how these tools were integrated into teacher education and discusses their perceived effectiveness, potential benefits, and pedagogical alignment with current educational theories. The collaborative initiative highlights the opportunities and challenges of incorporating AI into language teacher training at early educational stages.

Keywords: AI, productive skills, didactics of teaching English.

Streszczenie: Artykuł przedstawia opisową i refleksyjną analizę wybranych narzędzi online wykorzystujących sztuczną inteligencję (SI), które okazały się przydatne w rozwijaniu produktywnych umiejętności językowych, tj. mówienia i pisania, wśród przyszłych nauczycieli szkół podstawowych. Opierając się na doświadczeniach z kursów Dydaktyki Nauczania Języka Angielskiego na Uniwersytecie Radomskim (Polska) i Uniwersytecie w Oviedo (Hiszpania), autorki ilustrują, w jaki sposób aplikacje oparte na AI, takie jak *Voki*, *Flipgrid*, *FiveCardsFlickrStories* i generatora memów, były wykorzystywane przez studentów

¹ This article is one of the results of the Project PID2022-136548NB-I00 “Los retos de la inteligencia artificial para el Estado social y democrático de derecho,” funded by the Spanish Ministry of Science and Innovation under the 2022 “Proyectos de Generación de Conocimiento” call.

kierunków pedagogicznych do tworzenia angażujących i pedagogicznie uzasadnionych zajęć. Zamiast przeprowadzać badanie empiryczne z gromadzeniem danych, artykuł oferuje praktyczne spojrzenie na to, jak te narzędzia zostały zintegrowane z kształceniem nauczycieli, i omawia ich postrzeganą skuteczność, potencjalne korzyści oraz pedagogiczną zgodność z aktualnymi teoriami edukacyjnymi. Ta wspólna inicjatywa podkreśla możliwości i wyzwania związane z włączaniem SI do kształcenia nauczycieli języków obcych na wczesnych etapach edukacji.

Słowa kluczowe: AI, umiejętności produktywne, dydaktyka nauczania języka angielskiego.

Theoretical Framework

The integration of Artificial Intelligence (AI) in language education has opened new avenues for addressing challenges in teaching productive skills, speaking and writing. These skills, which enable learners to actively use the target language for communication, are fundamental in language acquisition, yet their development requires innovative methodologies and tools. This article presents a reflective, practice-based account of how AI tools can support the development of productive skills in teacher education. It is not an empirical research report, but a descriptive pedagogical proposal grounded in classroom practices at two European universities. At the same time, it situates AI applications within key linguistic and educational theories, offering a conceptual basis for evaluating their effectiveness. Speaking and writing are critical components of communicative competence, enabling learners to articulate ideas, engage in meaningful conversations, and produce coherent texts. Nevertheless, their acquisition is often hindered by common obstacles such as limited vocabulary, grammatical inaccuracies, pronunciation issues, and fluency deficits, all of which can impede effective communication². Cultural differences and discourse conventions may further complicate the development of productive skills, particularly in writing, where expectations can vary significantly across contexts.

Writing is an intricate process requiring not only grammatical accuracy and lexical range but also an understanding of genre conventions, audience expectations, and cultural norms. Many second language learners face challenges in aligning these elements, which significantly affects their ability to produce coherent and contextually appropriate texts³.

² L. Peng, B. Nuchged, & Y. Gao, *Spoken language intelligence of large language models for language learning*, 2023, <https://doi.org/10.48550/arXiv.2308.14536>.

³ K. Hyland, *Second language writing*, Cambridge, 2019, p. 45.

Additionally, motivation, and confidence are crucial factors in developing these skills, as learners who lack these qualities often hesitate to engage actively, reducing opportunities for practice.

Students often experience heightened anxiety when engaging in productive tasks, particularly speaking and writing. This anxiety stems from a fear of making errors, perceived judgment from peers or instructors, and a lack of confidence in their linguistic capabilities⁴.

Teaching productive skills requires a multifaceted approach that balances accuracy, fluency, and creativity. Speaking activities demand an environment where learners feel confident to experiment with language without fear of making mistakes, while writing activities must provide clear frameworks that guide students in organizing their ideas and using appropriate academic or creative registers⁵. Teachers also face the challenge of addressing diverse student needs within a single classroom, particularly in terms of linguistic proficiency and learning styles⁶. Moreover, providing timely and personalized feedback, a crucial component for improving speaking and writing, can be resource-intensive and difficult to scale.

One of the key difficulties in teaching writing lies in delivering actionable feedback at scale. While individualized feedback is known to significantly improve learner outcomes, it often requires extensive instructor time and effort, creating barriers to its implementation in larger classrooms⁷.

The integration of Artificial Intelligence (AI) in language education is deeply rooted in established linguistic and educational theories. These frameworks provide the conceptual basis for understanding how AI tools can effectively support the teaching and learning of productive skills, such as speaking and writing. Constructivist learning theory, developed by Piaget⁸ and expanded by Vygotsky⁹, emphasizes the active role of learners in constructing knowledge through interaction with their environment. In this framework, learners are seen as active participants who build understanding through meaningful experiences and social interaction.

⁴ J. Han, H. Yoo, J. Myung, M. Kim, T. Y. Lee, S. Y. Ahn, A. Oh, *ChEDDAR: Student-ChatGPT dialogue in EFL writing education*, 2023, <https://doi.org/10.48550/arXiv.2309.13243>, p. 19.

⁵ J. C. Richards, T. S. Rodgers, *Approaches and methods in language teaching*, Cambridge, 2014.

⁶ J. Harmer, *The practice of English language teaching*, London, 2007.

⁷ S. Jacob, T. Tate, & M. Warschauer, *Emergent AI-assisted discourse: Case study of a second language writer authoring with ChatGPT*, 2023, <https://doi.org/10.48550/arXiv.2310.10903>, p. 34.

⁸ J. Piaget, *To understand is to invent*, New York, 1973.

⁹ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Cambridge, 1978.

Vygotsky's concept of the zone of proximal development (ZPD) is particularly relevant here, as AI systems can adaptively scaffold learners' progress by providing support that matches their current proficiency level and gradually increasing the complexity of tasks¹⁰.

AI tools also embody the principles of adaptive learning, which emphasizes the customization of educational experiences to meet individual learner needs. These systems use machine learning algorithms to monitor learners' performance and tailor exercises to address specific weaknesses¹¹. For instance, an AI writing assistant might detect patterns of grammatical errors in a learner's writing and provide targeted practice exercises to address those errors. Similarly, conversational AI applications can adjust the complexity of dialogue prompts based on a learner's fluency, ensuring that tasks remain challenging yet achievable.

From a socio-cultural perspective, Vygotsky's emphasis on social interaction as a driver of learning is mirrored in collaborative AI tools. Platforms like *Flipgrid* facilitate peer interaction and cooperative learning, allowing learners to share ideas, provide feedback, and build communicative competence in a socially engaging environment¹². AI tools act as mediators in this process, enhancing communication and scaffolding the development of productive skills. Finally, Cognitive Load Theory¹³ posits that instructional design should optimize the mental effort required for learning. AI tools can reduce cognitive load by automating repetitive aspects of language learning, such as grammar correction or pronunciation assessment, enabling learners to focus on higher-order processes, such as organizing ideas or constructing arguments¹⁴.

AI has emerged as a transformative force in language education, offering innovative solutions to many of these challenges. AI-driven tools have the potential to personalize the learning experience, adapt to individual needs, and provide real-time feedback on linguistic performance. One of the most significant contributions of AI lies in personalized learning, as AI tools can analyze learner data to identify specific areas of weakness, such as pronunciation, grammar, or coherence in writing, and provide tailored exercises to target these areas¹⁵.

¹⁰ X. Yang, Q. Wang, J. Li, *Personalization in AI-driven language learning applications*, *Interactive Learning Environments*, 29(5), 567–585, 2021, <https://doi.org/10.1080/10494820.2020.1716028>.

¹¹ R. Godwin-Jones, *AI-writing tools in education: If you can't beat them, join them*, "Journal of Computer-Assisted Language Learning", Virginia, USA, 2022.

¹² J. Han, H. Yoo, J. Myung, M. Kim, T. Y. Lee, S. Y. Ahn, A. Oh, *ChEDDAR: Student-ChatGPT dialogue in EFL writing education*, 2023, <https://doi.org/10.48550/arXiv.2309.13243>.

¹³ J. Sweller, *Cognitive load during problem solving: Effects on learning*, "Cognitive Science" 12, 1988, 2: 257-285. [https://doi.org/10.1016/0364-0213\(88\)90023-7](https://doi.org/10.1016/0364-0213(88)90023-7).

¹⁴ P. Rao, J. Smith, & M. Lee, *Improving academic writing with AI tools: A comparative study*, "Language Teaching Research" 26, Oxford, 2022, 3: 349-368.

¹⁵ X. Yang, Q. Wang, J. Li, *Personalization in AI-driven language learning applications*,

AI systems excel in identifying specific learner needs through advanced data analytics. By tracking progress over time, these tools can dynamically adjust the difficulty and focus of exercises, ensuring that learners receive the most relevant practice for their unique challenges¹⁶.

AI also facilitates interactive learning. Tools such as chatbots, virtual tutors, and simulation-based platforms allow learners to practice speaking and writing in realistic, immersive environments. For example, AI-powered applications can simulate conversations with native speakers, enabling learners to practice real-world communication in a low-pressure setting¹⁷. Similarly, writing tools equipped with AI can generate prompts, analyze text coherence, and suggest improvements, helping learners refine their writing skills over time¹⁸.

AI-powered chatbots represent a groundbreaking development in language learning, providing learners with an opportunity to engage in authentic, context-specific dialogues. These systems reduce performance anxiety and encourage repeated practice, both of which are critical for developing communicative competence¹⁹.

Recent research highlights the effectiveness of AI tools in enhancing productive skills. Platforms like *Flipgrid* and *Voki* foster oral fluency by enabling students to create and share recorded responses in interactive environments²⁰. Similarly, tools such as *Grammarly* and *Quillbot* provide immediate, detailed feedback on written texts, helping learners improve grammatical accuracy and stylistic coherence²¹. Large language models, such as conversational AI systems, have also been used to simulate natural dialogues for speaking practice, improving learners' fluency and confidence²².

"Interactive Learning Environments", 29(5), 567–585, 2021, <https://doi.org/10.1080/10494820.2020.1716028>.

¹⁶ R. Godwin-Jones, *AI-writing tools in education: If you can't beat them, join them*, "Journal of Computer-Assisted Language Learning", Virginia, USA, 2022, p. 15.

¹⁷ D. Tafazoli, *Critical appraisal of artificial intelligence-mediated communication*, 2023, <https://doi.org/10.48550/arXiv.2305.11897>.

¹⁸ E. Chukharev-Hudilainen, M. Torrance, *Interactive writing environments: Combining AI and pedagogy to improve writing*, "Journal of Learning Technologies" 17, USA, 2021, 2: 45-67.

¹⁹ D. Tafazoli, *Critical appraisal of artificial intelligence-mediated communication*, 2023, <https://doi.org/10.48550/arXiv.2305.11897>, p. 22.

²⁰ L. Peng, B. Nuchged, & Y. Gao, *Spoken language intelligence of large language models for language learning*, 2023, <https://doi.org/10.48550/arXiv.2308.14536>.

²¹ P. Rao, J. Smith, & M. Lee, *Improving academic writing with AI tools: A comparative study*, "Language Teaching Research", 26, 2022, 3:349-368.

²² X. Yang, Q. Wang, J. Li, *Personalization in AI-driven language learning applications*, "Interactive Learning Environments", 29(5), 567-585, 2021, <https://doi.org/10.1080/10494820.2020.1716028>.

Criteria for selecting AI tools for the study

The use of AI tools in language education is strongly grounded in established theoretical frameworks that provide a foundation for effective teaching methodologies. Constructivist theory, as articulated by Piaget²³ and Vygotsky²⁴, emphasizes the importance of active learning through interaction and meaningful experiences. AI tools like *Flipgrid* and *Voki*, analyzed in this chapter, align with this perspective by offering students opportunities to practice speaking and writing in authentic, interactive contexts. These tools enable learners to construct linguistic knowledge through trial and error, supported by immediate feedback, which fosters both engagement and competence²⁵.

From a sociocultural perspective, Vygotsky's²⁶ concept of learning as a socially mediated process underscores the role of collaborative tools in language education. AI applications like *Five Cards Flickr Stories* facilitate peer interaction by enabling students to create and share digital narratives, encouraging collaboration and creativity in the development of productive skills²⁷. These tools act as mediators that scaffold learning, allowing students to internalize linguistic knowledge through interaction with both their peers and the technology.

Adaptive learning principles are also central to the design of many AI-driven tools. Grounded in the idea that instruction should be personalized to meet individual learner needs, adaptive learning systems analyze student performance to provide tailored exercises and feedback²⁸. For instance, *Grammarly* identifies patterns of grammatical errors in writing and generates targeted practice tasks, while conversational AI platforms adjust dialogue prompts based on the learner's proficiency level²⁹. This dynamic adaptability ensures that learners receive instruction that is challenging yet achievable, which is crucial for maintaining

²³ J. Piaget, *To understand is to invent*, New York, 1973.

²⁴ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Cambridge, 1978.

²⁵ X. Yang, Q. Wang, J. Li, *Personalization in AI-driven language learning applications*, "Interactive Learning Environments", 29(5), pp. 567-585, 2021, <https://doi.org/10.1080/10494820.2020.1716028>.

²⁶ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Cambridge, 1978.

²⁷ J. Han, H. Yoo, J. Myung, M. Kim, T. Y. Lee, S. Y. Ahn, A. Oh, *ChEDDAR: Student-ChatGPT dialogue in EFL writing education*, 2023, <https://doi.org/10.48550/arXiv.2309.13243>.

²⁸ R. Godwin-Jones, *AI-writing tools in education: If you can't beat them, join them*, "Journal of Computer-Assisted Language Learning", Virginia, USA, 2022.

²⁹ P. Rao, J. Smith, & M. Lee, *Improving academic writing with AI tools: A comparative study*, "Language Teaching Research" 26, Oxford, 2022, 3:349-368.

motivation and fostering progress³⁰. Moreover, Cognitive Load Theory³¹ further supports the integration of AI tools in language teaching. This theory posits that instructional design should aim to optimize mental effort by minimizing extraneous cognitive load. AI tools achieve this by automating repetitive tasks, such as grammar correction or pronunciation assessment, freeing up learners' cognitive resources to focus on higher-order skills like coherence and argumentation. For example, *Grammarly* automates surface-level corrections, allowing students to dedicate more time to refining the structure and creativity of their writing.

These theoretical foundations demonstrate how AI tools not only address traditional challenges in teaching speaking and writing but also enhance the learning experience by creating a personalized, interactive, and efficient environment. By embedding these principles, tools like *Voki*, *Flipgrid*, and *Grammarly* bridge the gap between theory and practice, offering innovative solutions to improve language education.

Thus, AI-based tools can assist students' developing productive linguistic skills, i.e. speaking and writing, and thereby improving their language skills. The tools selected for the study allow for the development of basic language skills, speaking in English and writing in an interesting way. They are widely available to teachers, students and online learners. In addition, they are simple and intuitive to use, free of charge in basic versions, which is important and sufficient to prepare students for effective work with preschool children and learners of the first stage of education. The use of the proposed interactive tools in the process of teaching English to the youngest significantly makes language classes more attractive, affects the motivation of students and their involvement in active participation in the proposed language exercises. Moreover, they provide students with not only high levels of interaction but also widely understood personalization. The adaptive and personalized learning experiences can also stimulate students' regular engagement in the learning environment. All the educational instruments introduced into the survey are of great help in empowering the learning process for the youngest learners. What is more, they can play a role in promoting the academic engagement of students, possibly due to their potential to create an interactive learning atmosphere that motivates students through accurate, timely and interactive feedback.

In order to create own linguistic interactive exercises, students from both universities started by familiarizing themselves with the networked tools. Firstly, they explored educational instruments aimed at developing learners' speaking in the English language, i.e. *Voki* and *Flipgrid*. Secondly, they were introduced to online tools designed to teach writing in an engaging manner, i.e. *FiveCardsFlickrStories*

³⁰ H. Liu, S. Wu, *AI-based platforms for language learning: Opportunities and challenges*, "Computer Assisted Language Learning", 33(4), 2020, 325-343. <https://doi.org/10.1080/09588221.2019.1681467>.

³¹ J. Sweller, *Cognitive load during problem solving: Effects on learning*, "Cognitive Science" 12, 1988, 2: 257-285. [https://doi.org/10.1016/0364-0213\(88\)90023-7](https://doi.org/10.1016/0364-0213(88)90023-7).

and *Meme Generator*. Next, they created their own products, that could be used in the process of teaching productive skills to young learners. Throughout this process, the lecturer monitored their work, providing guidance, explanations, and support as needed. All the students worked hard and at the same time had a great time. Finally, the students from both universities worked in groups, presenting their online tools and making the attempts to assess the products together with the teacher. They were discussing the usefulness of the task, the level of the language prepared for very young learners, linguistic correctness, richness of linguistic means, attractiveness of ideas used as well as the time limit of the activity. This process was particularly valuable for students from the University of Oviedo, who are enrolled in the Primary Education degree program. As future teachers of English in primary schools, learning to use these tools equips them with innovative methodologies they can implement in their own classrooms. The ability to integrate technology into teaching not only enhances their pedagogical repertoire but also prepares them to meet the demands of bilingual education in primary schools, a growing trend in Spain³².

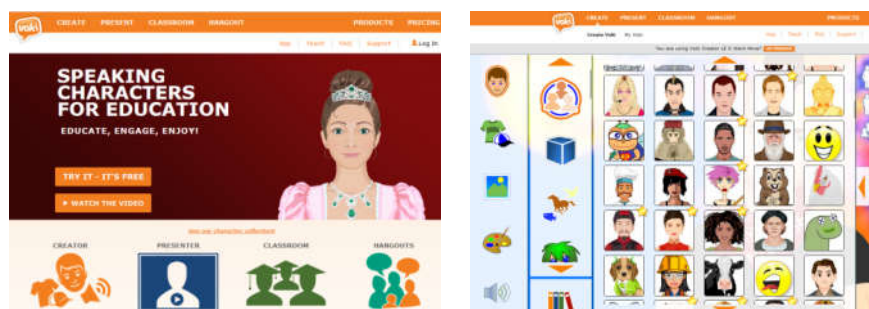
Presentation of AI Tools and Activities

This article does not report on systematic data collection but rather on a practice-based pedagogical experience. The activities were carried out in two cohorts of student teachers enrolled in the Didactics of English courses at the University of Radom (Poland) and the University of Oviedo (Spain), with a total of approximately 135 participants (aged early twenties, CEFR B1–B2 level). Under the guidance of their lecturers, the students explored AI-based tools and collaboratively designed tasks aimed at developing productive skills for young learners. Feedback on the activities was gathered informally through classroom discussions and reflective exchanges, rather than through structured research instruments. The methodological approach is therefore descriptive and exploratory, focused on documenting and reflecting upon classroom practice.

One of the multimedia tools that supports the development of students' speaking and communication skills in English, and at the same time helps develop the social competences of students, is the *Voki* speaking avatar creation service³³. This tool, operated in an intuitive and simple way, significantly increases students' motivation to undertake language activities and engages students who are often passive and withdrawn when developing speaking skills.

³² J. C. Richards, T. S. Rodgers, *Approaches and methods in language teaching*, Cambridge, 2014.

³³ <https://www.voki.com>, [Accessed: 27.03.2024.].



Pictures 1 and 2: Voki – Home Page, Character Selection

The *Voki* service has several versions related to the paid and free versions of the tool. The possibilities of working in the free version are limited, but sufficient to propose attractive activities for the needs of each school. The paid version allows, among other things, to create avatar class teams, assign additional tasks and assess the student's work. In the program's gallery, we will find a whole range of characters to choose from (editable, with the possibility of modifying the appearance). Thanks to this teaching aid, we can practice with the student, for example, short dialogues, introducing oneself, asking for information, showing the way, giving instructions or short information, etc. In the first option, the student enters the statement they have prepared into the dialogue box so that the computer program converts the writing into speech with the accent chosen by the student (e.g.: British, American, Scottish, Welsh, Australian or New Zealand). With the material prepared in this way, the student practices the correct pronunciation of a given language, and this tool has a wide range of them. Other versions of working with words include recording a short statement (length up to one minute) or attaching an MP3 file to the speaking avatar. The MP3 file can be prepared using the *Vocaroo*³⁴ voice recording application.

By using the *Voki* speaking avatar creator in English lessons, teachers can offer students an unusual way to reinforce specific questions about personal data, appearance, personality traits, or friends' preferences. Teachers also like to use this tool to send homework instructions to students in audio-visual form.

Furthermore, this creator allows you to give your avatar a unique look, use it to transmit content to listen to, design a scene in which it will appear, save the project for later editing, publish the product on the Internet and send the avatar by email to specified recipients. Using the website www.voki.com, after creating their own account and logging in, the student, monitored by the teacher, is able to independently create an avatar character and give it specific features: choose gender, hairstyle, body shape, lips, eye color, skin color, clothes, jewelry, etc.³⁵.

³⁴ <https://vocaroo.com/>, [Accessed: 28.03.2024.].

³⁵ I. Gryz, *Wykorzystanie Technologii Informacyjno-Komunikacyjnych w nauczaniu Języków obcych – innowacje*, In: D. Gonigroszek (red.), *Języki obce i kultura: nowe konteksty edukacyjne. Foreign Languages and Cultures: New Educational Contexts*,

Therefore, through play, they can use the vocabulary they have learned to create dialogues and statements on their own. By adding their voice to the avatar, they can record a statement about themselves: introduce themselves, inform the recipient where they come from, what school they go to, what their interests or hobbies are, they can introduce their family, tell about their best friend, or what they like to eat or do in their free time³⁶. In order to improve the avatar they have generated, learners can play various social roles, i.e. take on the role of a representative of a chosen profession. Students conduct and record previously prepared interview, using a dictaphone or mobile phone, while at the same time consolidating the phrases and grammatical structures they have learned, which are necessary for correct communication.

Example of an activity designed using the *Voki* tool

Main goal: creating the avatar presenting one-minute speech in English. Topic of it is answering the question: *Why do you like attending a kindergarten?*

Students who attend the *classes Didactics of English teaching in the kindergarten and primary school (grades 1-3)*, are supposed to get familiar with characteristic features of pre-primary learners, as well as lower primary ones. As the form of verifying their knowledge in a practical way they prepare a short speech from the young learner's point of view (students choose the age themselves). They are to take on a role of a child. Not only their language must be very simple but also the grammar structures used while speaking. What is important, the students are supposed to present as many features of YL as they can in one minute speech. For this purpose they use the *Voki* tool. Examples of products (own resources):



Pictures 3, 4 and 5: Examples of self-created avatars (own resources)

Voki - Voki Scene Pickup (Wiktoria: 6 year-old- child),

Voki - Voki Scene Pickup (Susan: 7 year-old- child),

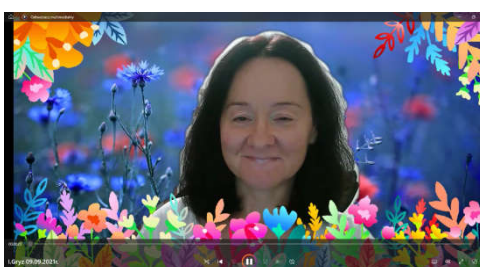
Voki - Voki Scene Pickup (Wiktoria: 7 year-old- child),

Voki - Voki Scene Pickup (Aleksandra: 10-year-old child).

Piotrków Trybunalski, 2015, p. 109.

³⁶ Ibidem, p. 110.

To effectively develop speaking skills, it is worth using a tool that is part of MS Teams, i.e. the ***Flipgrid*** application³⁷. *Flipgrid* is a web-based tool that allows teachers to provide a space that facilitates the creation of statements by students using both vision and sound. It is an effective tool for engaging students through video discussions in synchronous mode. It is another alternative to traditional discussions based on analog text. The product prepared by students can be monitored by a linguist during work and opened after students publish it. *Flipgrid* is based on Flash technology, but an iPad application is also available. *Flipgrid* is an educational tool that includes functions similar to popular functions offered by social media³⁸.



Pictures 6: *Example of prepared Flipgrid interface (own resources)*

This tool supports the development of speaking skills for all students, from quiet and shy to extroverts and confident leaders of a group. *Flipgrid* offers students a way to express their thoughts without the anxiety and stress of being the center of attention³⁹. By amplifying student voices that are often unheard in a traditional classroom, *Flipgrid* provides a more complete educational experience for all. Its online video platform allows students to share video messages with their classmates, instructor, and possibly other friends around the world. Students find it a user-friendly tool that helps them connect with each other and increases student engagement in the classroom⁴⁰.

³⁷ *Flipgrid* tutorial: <https://www.youtube.com/watch?v=wuE7OmsUuS0>, [Accessed: 27.12.2024.].

³⁸ O. Mango, *Flipgrid: Students' perceptions of its advantages and disadvantages in the language classroom*. "International Journal of Technology in Education and Science (IJTES)", 5(3), 2021, 277-287. <https://doi.org/10.46328/ijtes.195>, p. 278.

³⁹ A. T. Vander, (2019). Teachers Flip over Flipgrid., 2019, <https://www.forbes.com/sites/tomvanderark/2019/07/01/teachers-flip-over-flipgrid/?sh>, p. 2.

⁴⁰ R. Holbeck, & J. Hartman, Efficient strategies for maximizing Online Student satisfaction: Applying technologies to increase cognitive presence, social Presence, and teaching Presence, "Journal of Educators Online", 2018, 15(3) 91-95, p. 94.

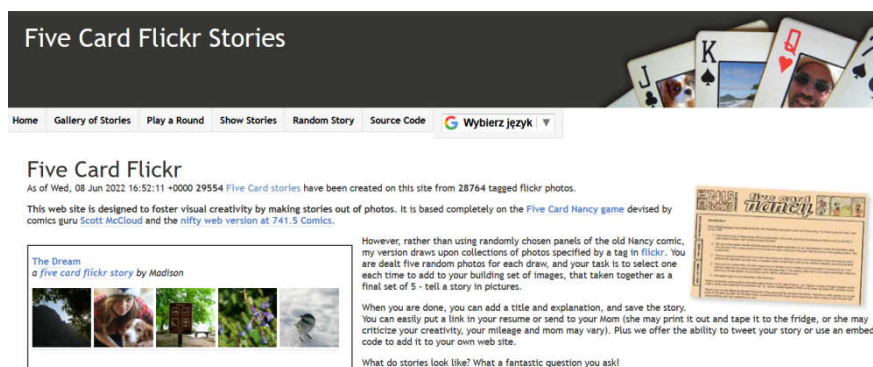
Example of an activity designed using the *Flipgrid* tool

Main goal: creating the 1-2-minute speech in English using the *Flipgrid* tool. Topic of it is to answer the question: *Why is it worth learning foreign languages?*

The task for children in the third grade of primary school is to prepare a short statement in English (or any other language chosen by the child that is used in the European Union), showing the advantages of learning foreign languages. The learners can train the sequencing sentences, e.g.: *To start with, What's more, In addition to this, Finally, etc.* This exercise can be part of preparations for the European Day of Languages (<https://edl.ecml.at/>) – 26th September or International Dot Day (<https://www.internationaldotday.org/>) – 15th September.

Efficient and recommendable tools that help develop the ability to write short and longer written statements are generators for creating stories in English. We can easily find numerous examples of them on the Internet.

A very useful and creative tool supporting the development of writing skills is **Five Cards Flickr Stories**⁴¹. *FiveCardsFlickrStories* has in its resources a countless number of randomly selected illustrations that are a visual stimulus to undertake the creative act of writing.



Picture 7: *Five Cards Flickr Stories – the Interface*

After selecting five sample images, students create their own stories on a topic provided by the teacher. They practice the proposed grammatical structures and vocabulary. The prepared stories are saved in a gallery on the platform or shared with the teacher via a link to the page. The tool also contains a number of previously created stories or short stories that students can use to develop their own language skills.

The presented examples of online tools introduced in foreign language classes support the work of language teachers, which allows them to fruitfully present new material to their students and consolidate the knowledge they have acquired so far. The use of innovative and attractive accessories motivates students to increase their effort in developing key productive language skills and has a positive impact on their

⁴¹ <https://5card.cogdogblog.com/index.php>, [Accessed: 21.10.2024.].

involvement in their own educational process. As a result, students become active creators of thematic content that they are eager to share (blogs), active interlocutors on social media, collectors of information that is important from their point of view, as well as courageous critics presenting their own point of view on topics that interest them.

Recommended websites that will help students trying their hand at writing are the *WordHippo* thesaurus⁴² and *SKELL*⁴³.



Pictures 8 and 9: *WordHippo* and *SKELL* – Home Pages

Both tools support students in developing lexical correctness. They make it easy to find synonyms, antonyms, word definitions, and example sentences with a selected word. Students can also listen to the correct pronunciation of a given phrase and practice word formation.

Example of an activity designed using the *Five Cards Flickr Stories* tool

Main goal: creating a short story (6-8 sentences) in English using the *Five Cards Flickr Stories* tool.

The students' from the high school task is to create own short story on the basis of five randomly chosen images from the *Five Cards Flickr Stories* tool. The main topic of the story is Christmas Time and the life of Ebenezer Scrooge, the main hero from Charles Dickens' *Christmas Carol*.

⁴² <https://www.wordhippo.com>, [Accessed: 21.10.2024.].

⁴³ <https://skell.sketchengine.eu>, [Accessed: 21.10.2024.].

Five Card Story: Ebenezer Scrooge

stories: [prev](#) | [random](#) | [next](#)

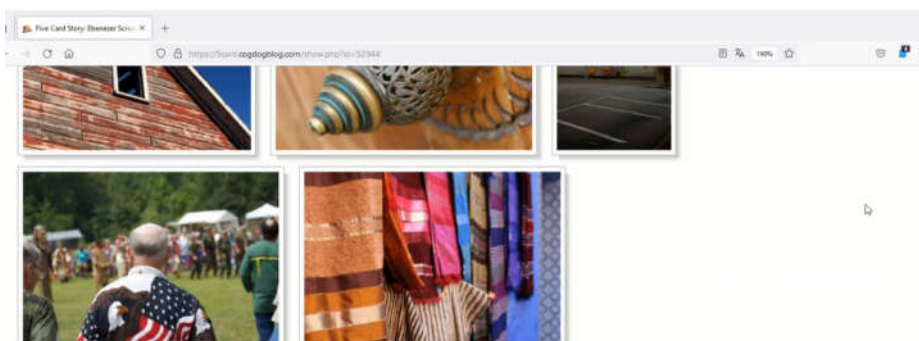
a Five Card Flickr story by Ola created Dec 04 2023, 09:17:14 am. [Create a new one!](#)



flickr photo credits: (1) [keepps](#) (2) [Serenae](#) (3) [bionicteaching](#) (4) (5) [bionicteaching](#)

about this story

Once a bitter miser, Ebenezer Scrooge faced a night of haunting revelations. Ghosts unveiled the consequences of his heartless ways. When he was awakening on Christmas morning, he embraced kindness. Scrooge, once a miser, became a symbol of redemption. But still, everyone was happy about his death.



flickr photo credits: (1) (2) [Serenae](#) (3) [bionicteaching](#) (4) [bionicteaching](#) (5) [Serenae](#)

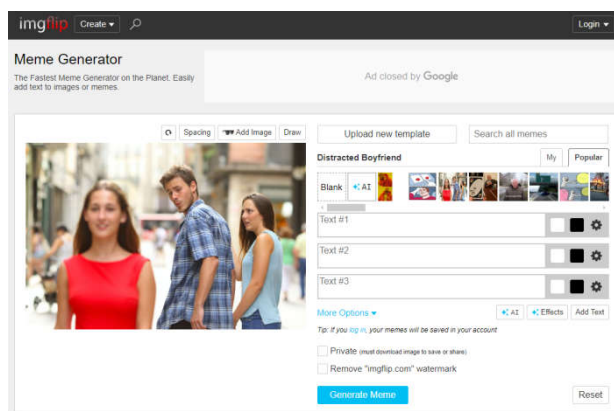
about this story

Ebenezer's past was direly hard for him. After the visit made by the ghosts he is going to stay in his house for a few days. All of the door will be locked because as everybody fairly suppose, he will freak out when he sees somebody. But after this few days he is going to realise that his life was a complete tragedy. He will follow our advice to smile more. He will be more outgoing, less selfish and merciless. Some people will even become his friends and his life is going to gain colours.

Pictures 10 and 11: Examples of short stories created using the *FiveCardsFlickStories* tool (own resources)

An effective stimulus not only to support language skills such as writing or consolidating grammar issues but also to strengthen speaking skills is the widely known the Meme Generator *Imgflip*⁴⁴.

⁴⁴ <https://imgflip.com>, [Accessed: 21.10.2024.].



Pictures 12: *Imgflip* – the Interface

Using *the Meme Generator*, students create their own memes in relation to the topic being discussed (selected lexical and grammatical issues), e.g. idiomatic expressions, modal and phrasal verbs, proverbs, particular grammatical structures, etc. To prepare their own memes, students start by choosing an interesting and thematically appropriate template. In this regard, they have several options: use the resources included in the tool, send their own image or photo to the generator, or make a custom meme from AI. Then, depending on what and how long content they intend to place in the image, they prepare a sentence containing a fixed linguistic structure or a stimulus that is an incentive to start, for example, a conversation. The tool in question has three options for placing content: at the very top of the image, in the middle or at the bottom. Font, size, shadow, color, additional images (spacing, rotating), letters opacity, text align, outline width and drawing their own elements on the created meme are further actions taken by the creator to make the version of the product more attractive. What's more, students can use the special effects that the tool has: Smart Posterize, JPEG Degrade, JPEG Min Quality, Median Filter, Blur, Sharpen, Grayscale, Sepia, Invert, Brightness. Finally, the prepared meme can be downloaded in the *jpg* format to save as private or share, as well as removed from the cyberspace.

Example of an activity designed using the *Meme Generator* tool

Main goal: creating a meme presenting the English idiom using the *Meme Generator* tool. After learning basic English idioms, to consolidate the gained knowledge, students from the high school are asked to prepare a kind of visualization of chosen memes using the *Meme Generator* online tool.



Pictures 13-15: Examples of memes presenting selected idioms (own resources)

Discussion

This section evaluates the effectiveness of the AI tools used in the study (*Voki*, *Flipgrid*, *FiveCardsFlickrStories*, and *Meme Generator*) in enhancing the development of speaking and writing skills among students. These tools, selected for their interactive and innovative features, were implemented in activities designed to foster linguistic competence and creativity.

The discussion focuses on the specific benefits observed during their use, including increased confidence, creativity, and engagement among students. Additionally, it identifies key challenges and limitations encountered during the implementation process, such as technical issues, the adaptability of tools to younger learners, and the need for instructor intervention. Finally, these findings are contextualized within the theoretical framework, emphasizing how AI tools align with pedagogical principles and how they can be further refined to improve teaching practices.

Analysis of the Effectiveness of Selected AI Tools

Effectiveness in Developing Speaking Skills

The implementation of AI tools like *Voki* and *Flipgrid* in language teaching demonstrated significant benefits for developing speaking skills, particularly in reducing anxiety and fostering linguistic creativity. These tools align closely with constructivist and sociocultural learning theories, which emphasize the importance of authentic interaction and scaffolded practice⁴⁵. *Voki*, for instance, allowed students to create and customize avatars, which they used as a medium for storytelling and role-playing activities. This personalization aspect provided a safe space for students to experiment with language without the fear of direct judgment. As described above, students found it easier to express themselves through their avatars, rather than exposing their own vulnerabilities. This aligns with studies highlighting the role of anonymity in reducing language performance anxiety and encouraging oral fluency⁴⁶. Moreover, *Voki* supported the development

⁴⁵ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Cambridge, 1978.

⁴⁶ X. Yang, Q. Wang, J. Li, *Personalization in AI-driven language learning applications*, "Interactive Learning Environments", 29(5), 567–585, 2021, <https://doi.org/10.1080/10494820.2020.1716028>.

of pronunciation and intonation by enabling students to record and listen to their own voices repeatedly. This iterative process mirrors the principles of adaptive learning, as students could self-monitor and adjust their speech based on their recordings. For younger learners, this feature holds additional value, as it fosters early oral competence in a way that is engaging and age-appropriate.

Flipgrid took this to the next level by integrating peer collaboration into the speaking practice. Students were tasked with recording short video responses to prompts and sharing them with their peers. Unlike traditional speaking activities, this asynchronous format gave learners the opportunity to rehearse their responses, reducing the pressure often associated with real-time speaking tasks. This reflects findings by Godwin-Jones⁴⁷, who observed that asynchronous platforms allow students to build confidence while still engaging in meaningful communication. *Flipgrid* also encouraged a sense of community among students. Students enjoyed watching and responding to their classmates' videos, which not only motivated them to improve their own work but also exposed them to diverse language styles and ideas. One student commented: "*Seeing how creatively my classmates responded made me want to try harder and use new vocabulary in my own video*". This collaborative element reflects Vygotsky's⁴⁸ idea of learning as a socially mediated process, where interaction with peers and more knowledgeable others enhances language acquisition. Another notable aspect of *Flipgrid* was its adaptability for different teaching goals. For example, during the implementation, lecturers used it to simulate real-world speaking scenarios, such as interviews or presentations, which helped students develop practical communication skills. This contextualized learning experience aligns with the principles of communicative competence, as students practiced language in situations closely resembling those they may encounter as future teachers.

In both cases, the tools supported the lecturer's role as a facilitator. By monitoring student submissions and providing targeted feedback, the lecturer was able to scaffold learning effectively. This aligns with Jacob, Tate, and Warschauer's⁴⁹ argument that AI-driven tools enhance teaching by automating routine aspects of evaluation, allowing educators to focus on higher-order feedback.

Effectiveness in Developing Writing Skills

The use of AI tools like *FiveCardsFlickrStories* and *Meme Generator* demonstrated substantial potential in enhancing students' writing skills by fostering

⁴⁷ R. Godwin-Jones, *AI-writing tools in education: If you can't beat them, join them*, "Journal of Computer-Assisted Language Learning", Virginia, USA, 2022.

⁴⁸ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Cambridge, 1978.

⁴⁹ S. Jacob, T. Tate, & M. Warschauer, Emergent AI-assisted discourse: Case study of a second language writer authoring with ChatGPT, 2023, <https://doi.org/10.48550/arXiv.2310.10903>.

creativity, precision, and engagement. These tools align with principles of constructivist learning, as they encourage learners to actively construct meaning through the creative process of writing⁵⁰. Additionally, they offer opportunities for adaptive learning by tailoring activities to specific linguistic goals, such as coherence, vocabulary expansion, and audience awareness.

FiveCardsFlickrStories, in particular, challenged students to create coherent narratives based on a sequence of random images. This activity required learners to think critically about how to connect disparate visual stimuli into a unified story, promoting not only creativity but also the ability to structure ideas logically. Students enjoyed the challenge of finding connections between unrelated images, which pushed them to experiment with new vocabulary and expressions. This aligns with Hyland's⁵¹ findings, which emphasize that creative tasks help students overcome writer's block by engaging them in non-linear thinking. The visual stimuli provided by *FiveCardsFlickrStories* facilitated the integration of multimodal learning, allowing students to combine textual and visual elements to enhance their storytelling. This approach aligns with Vygotsky's⁵² sociocultural theory, which highlights the importance of using diverse tools and resources to mediate the learning process. One student reflected: "*the images made it easier to start writing, and they gave me ideas I wouldn't have thought of on my own*". By reducing the cognitive load associated with generating original content from scratch, this activity helped students focus on improving their language use and narrative coherence⁵³.

Meme Generator introduced a modern and engaging approach to writing by requiring students to create captions for humorous or thought-provoking images. While seemingly informal, this activity proved effective in teaching concise writing, as students had to communicate their ideas clearly within the constraints of the format. Additionally, it allowed students to focus on audience awareness, a critical aspect of writing skills. Creating captions required them to consider the intended impact on the reader, fostering a sense of rhetorical awareness. This ties into Hyland's⁵⁴ concept of genre-based writing, which emphasizes the importance of understanding how language choices affect the reception of a text by its audience.

Both tools also contributed to collaborative learning. As part of the process, students shared their work with peers and engaged in constructive feedback sessions, guided by the lecturer. These interactions reinforced sociocultural principles by encouraging students to learn from each other and refine their writing based on external input. Collaborative activities of this nature not only improve linguistic

⁵⁰ J. Piaget, *To understand is to invent*, New York, 1973.

⁵¹ K. Hyland, *Second language writing*, Cambridge, 2019.

⁵² L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Cambridge, 1978.

⁵³ J. Sweller, Cognitive load during problem solving: Effects on learning, "Cognitive Science 12", 1988, 2: 257-285. [https://doi.org/10.1016/0364-0213\(88\)90023-7](https://doi.org/10.1016/0364-0213(88)90023-7).

⁵⁴ K. Hyland, *Second language writing*, Cambridge, 2019.

accuracy but also build confidence and a sense of community among learners⁵⁵. The flexibility of these tools allowed lecturers to adapt them to various learning objectives. For example, *Meme Generator* was used not only to teach grammar and word choice but also to explore cultural nuances and humor in English, broadening students' intercultural competence. This adaptability underscores the value of integrating AI tools into language education, as they can be tailored to address diverse teaching goals while keeping students engaged.

Challenges and Limitations Encountered During Implementation

While the integration of AI tools into language education has demonstrated significant benefits, several challenges and limitations emerged during their implementation. These obstacles highlight areas where improvements are necessary to fully realize the potential of AI in enhancing speaking and writing skills.

1. Limited Human Interaction

AI-driven tools, while effective in providing personalized learning experiences, often lack the nuanced interaction that human teachers offer. The absence of real-time, culturally informed feedback can impede learners' ability to grasp subtleties in language use. Rebolledo Font de la Vall and González Araya point out that *"although AI can replicate structured linguistic feedback, it cannot yet match the depth of interpersonal interactions essential for mastering contextual and cultural nuances in language learning"*⁵⁶.

2. Dependence on Technology

Overreliance on AI tools can lead to a reduction in face-to-face communication skills, as learners may prioritize technology over interpersonal interaction. This is particularly concerning in language learning, where communication is inherently social. Balancing AI-driven methods with traditional techniques is crucial: *"AI tools are effective in scaffolding learning, but they must complement, rather than replace, human interaction to ensure holistic language development"*⁵⁷.

⁵⁵ J. Han, H. Yoo, J. Myung, M. Kim, T. Y. Lee, S. Y. Ahn, A. Oh, ChEDDAR: Student-ChatGPT dialogue in EFL writing education, 2023, <https://doi.org/10.48550/arXiv.2309.13243>.

⁵⁶ R. Font de la Vall, R., & F. G. Araya, *Exploring the benefits and challenges of AI-language learning tools*, "International Journal of Social Sciences and Humanities Invention", 10, 2023, <https://doi.org/10.18535/ijsshi/v10i01.02>

⁵⁷ H. Liu, S. Wu, *AI-based platforms for language learning: Opportunities and challenges*, "Computer Assisted Language Learning", 33(4), 2020, 325-343. <https://doi.org/10.1080/09588221.2019.1681467>, p. 328.

3. Data Privacy Concerns

The use of AI in education involves collecting personal data such as speech patterns and writing samples, which raises significant privacy concerns. Protecting this sensitive information is critical to maintaining user trust. Godwin-Jones highlights that “*educators must navigate stringent data protection regulations and ethical considerations when implementing AI tools, as failure to do so can undermine their potential benefits*”⁵⁸.

4. Quality and Accuracy of AI Tools

“*Regular updates and rigorous evaluation are essential to ensure that AI tools remain reliable and educationally valuable*”⁵⁹. The effectiveness of AI tools depends heavily on the quality of their algorithms and training data. Poorly designed tools may reinforce incorrect language usage or perpetuate cultural biases.

5. Technical Challenges

Implementing AI tools requires robust technological infrastructure, including reliable internet access and compatible devices. In regions with limited resources, these requirements can pose significant barriers. Han et al. note that “*technical issues not only disrupt the learning process but also exacerbate inequalities in access to AI-enhanced education*”⁶⁰.

6. Ethical Considerations

The use of AI in education introduces ethical dilemmas, such as biases in language models or the potential for over-standardization of language use. Educators need to develop AI literacy to effectively guide learners and address these challenges. As Vygotsky’s⁶¹ socio-cultural theory suggests, tools should be used as mediators for learning, but their limitations must be acknowledged to prevent over-reliance or misuse.

Grounding AI Tools in Educational Theories

The integration of AI tools in language teaching is deeply aligned with foundational educational theories, which provide a framework for understanding their effectiveness developing productive skills. The tools analyzed in this study

⁵⁸ R. Godwin-Jones, *AI-writing tools in education: If you can't beat them, join them*, “Journal of Computer-Assisted Language Learning”, Virginia, USA, 2022, p. 17.

⁵⁹ D. Tafazoli, *Critical appraisal of artificial intelligence-mediated communication*, 2023, <https://doi.org/10.48550/arXiv.2305.11897>, p. 23.

⁶⁰ J. Han, H. Yoo, J. Myung, M. Kim, T. Y. Lee, S. Y. Ahn, A. Oh, *ChEDDAR: Student-ChatGPT dialogue in EFL writing education*, 2023, <https://doi.org/10.48550/arXiv.2309.13243>, p. 12.

⁶¹ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Cambridge, 1978.

(*Voki*, *Flipgrid*, *FiveCardsFlickrStories*, and *Meme Generator*) reflect key principles from constructivism, sociocultural theory, adaptive learning, and cognitive load theory.

Constructivism and Learner-Centered Engagement

Constructivist learning theory emphasizes that learners actively construct knowledge through meaningful interactions and experiences⁶². Tools like *Voki* and *FiveCardsFlickrStories* embody this principle by enabling students to engage in creative, learner-centered tasks. For instance, *Voki* facilitates role-playing activities where students craft personalized narratives, allowing them to experiment with language in a context that feels authentic and engaging. Similarly, *FiveCardsFlickrStories* challenges students to construct coherent narratives based on visual prompts, encouraging critical thinking and creative expression.

These activities align with the constructivist view that learners gain a deeper understanding of language when they actively participate in its use, rather than passively consuming information: “tasks that encourage creativity and learner autonomy foster linguistic competence by allowing students to explore language in meaningful contexts”⁶³.

Sociocultural Theory and Collaborative Learning

Vygotsky’s⁶⁴ sociocultural theory highlights the importance of social interaction and mediated learning in the development of language skills. Tools like *Flipgrid* and *FiveCardsFlickrStories* integrate collaborative elements, encouraging peer interaction and cooperative learning. For example, *Flipgrid* facilitates video-based discussions where students share their responses and provide feedback to one another. This social component not only enhances communicative competence but also reinforces linguistic skills through the exchange of ideas.

Furthermore, the lecturer’s role as a mediator aligns with Vygotsky’s concept of the Zone of Proximal Development (ZPD), where learners benefit most from tasks that are slightly beyond their current abilities but accessible with guidance. The use of these tools allows teachers to scaffold learning by providing timely feedback and support, ensuring that students progress toward higher levels of language proficiency⁶⁵.

⁶² J. Piaget, *To understand is to invent*, New York, 1973.

⁶³ K. Hyland, *Second language writing*, Cambridge, 2019, p. 56.

⁶⁴ L. S. Vygotsky, *Mind in society: The development of higher psychological processes*, Cambridge, 1978.

⁶⁵ J. Han, H. Yoo, J. Myung, M. Kim, T. Y. Lee, S. Y. Ahn, A. Oh, *ChEDDAR: Student-ChatGPT dialogue in EFL writing education*, 2023, <https://doi.org/10.48550/arXiv.2309.13243>, p. 12.

Adaptive Learning and Personalized Feedback

Adaptive learning principles emphasize the importance of tailoring educational experiences to individual learner needs. AI tools like *Grammarly* and *Flipgrid* demonstrate this adaptability by providing personalized feedback based on real-time performance data. *Grammarly*, for instance, analyzes student writing to identify areas for improvement, such as grammar, coherence, or tone, and offers targeted suggestions for revision.

This level of customization mirrors the principles of adaptive learning, as outlined by Yang, Wang, and Li, who argue that “*AI-driven tools that adapt to individual learner needs are instrumental in bridging gaps in knowledge and fostering sustained progress*”⁶⁶. By addressing specific weaknesses, these tools empower learners to focus on areas that require the most attention, accelerating their development of productive skills.

Cognitive Load Theory and Task Optimization

Cognitive Load Theory⁶⁷ posits that instructional design should minimize extraneous cognitive load to optimize learning. AI tools play a crucial role in achieving this by automating repetitive tasks and reducing the cognitive burden on learners. For example, *Meme Generator* simplifies the process of brainstorming ideas by providing visual prompts, enabling students to concentrate on crafting concise and impactful captions. Similarly, *Grammarly*’s automated grammar checks allow students to focus on refining the structure and creativity of their writing, rather than being bogged down by surface-level errors.

Connecting Theory and Practice

The integration of AI tools demonstrates how theoretical principles can be applied to practical teaching scenarios. By embedding these tools within classroom activities, lecturers create a bridge between theory and practice, enabling students to benefit from evidence-based methodologies. This connection not only enhances the learning experience but also provides a model for how educators can leverage technology to align their teaching with established pedagogical frameworks.

In conclusion, the integration of AI tools in language teaching demonstrates a clear alignment with foundational educational theories, reinforcing their value as innovative and effective pedagogical instruments. Constructivist principles are evident in the way tools like *Voki* and *FiveCardsFlickrStories* foster active engagement and creative expression, enabling learners to construct knowledge through meaningful tasks. Similarly, sociocultural theory is reflected in collaborative

⁶⁶ X. Yang, Q. Wang, J. Li, *Personalization in AI-driven language learning applications*, “Interactive Learning Environments”, 29(5), 567-585, 2021, <https://doi.org/10.1080/10494820.2020.1716028>, p. 573.

⁶⁷ J. Sweller, Cognitive load during problem solving: Effects on learning, “Cognitive Science” 12, 1988, 2: 257-285. [https://doi.org/10.1016/0364-0213\(88\)90023-7](https://doi.org/10.1016/0364-0213(88)90023-7).

platforms like *Flipgrid*, which create opportunities for peer interaction and mediated learning that extend beyond traditional classroom boundaries.

Adaptive learning principles are brought to life through the personalized feedback mechanisms of AI tools such as *Grammarly*, which target individual weaknesses and accelerate progress. Additionally, the role of AI in minimizing extraneous cognitive load, as seen with tools like *Meme Generator*, supports learners in focusing on higher-order skills essential for productive language use.

Theories such as constructivism, sociocultural learning, adaptive learning, and cognitive load theory underscore the potential of AI tools to address key challenges in language education. However, their effectiveness depends on thoughtful implementation that leverages these theoretical foundations while mitigating limitations such as technical barriers, ethical concerns, and the need for teacher training.

By grounding AI tools in well-established educational theories, educators can create a more engaging, equitable, and effective learning environment. These tools not only enhance teaching methodologies but also prepare students for the evolving demands of language use in a digitally mediated world. Future research and practice should continue exploring how these theoretical frameworks can inform the development of AI tools, ensuring their alignment with both pedagogical goals and learner needs.

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THE ATTRACTIVENESS AND COMPREHENSIBILITY OF NATIVE ENGLISH ACCENTS: ATTITUDES OF POLISH EFL SPEAKERS

Abstract: This study investigates the perceptions of Polish EFL learners regarding the comprehensibility, attractiveness, and formality of five native English accents: General American, Estuary English, Scottish, Multicultural London English (MLE), and General Australian. A questionnaire was distributed to 59 adult learners, including professionals, with the majority lacking formal training in phonetics or linguistics to minimize bias. Respondents rated each accent on a Likert scale after listening to recordings of native speakers reading the same text. While the sample size limits the statistical significance of the findings, median scores reveal notable trends. General American and Estuary English were perceived as the most comprehensible and formal, whereas Multicultural London English and Scottish accents elicited mixed reactions in terms of attractiveness. These findings contribute to the ongoing discussion of accent perceptions in English language education, providing preliminary insights into the importance of exposure to diverse accents in globalized EFL contexts.

Keywords: English varieties, English as a Foreign Language (EFL), English accents, English pronunciation.

Streszczenie: Niniejsze badanie dotyczy postrzegania przez polskich uczących się języka angielskiego zrozumiałości, atrakcyjności i formalności pięciu rodzimych akcentów angielskich: General American, Estuary English, Scottish, Multicultural London English (MLE), oraz General Australian. Kwestionariusz został rozesłany do 59 dorosłych uczniów, w tym osób pracujących, z których większość nie posiadała wykształcenia w zakresie fonetyki lub językoznawstwa, w celu zwiększenia obiektywności. Uczestnicy oceniali każdy akcent na skali Likerta po wysłuchaniu nagrań native speakerów czytających ten sam tekst. Liczebność grupy badanej ogranicza statystyczną istotność badań, jednakże mediana wyników ujawnia znaczące trendy. General American oraz Estuary English były postrzegane jako najbardziej zrozumiałe i formalne, podczas gdy

MLE i Scottish wzbudziły mieszane reakcje pod względem atrakcyjności. Wyniki te stanowią wkład w toczącą się dyskusję na temat postrzegania akcentu w edukacji języka angielskiego, zapewniając wstępny wgląd w znaczenie ekspozycji na różne akcenty w nauczaniu języka angielskiego jako obcego (EFL) w erze globalizacji.

Słowa kluczowe: odmiany języka angielskiego, język angielski jako obcy (EFL), akcenty w języku angielskim, wymowa języka angielskiego.

Introduction

The concept of an accent encompasses the distinct phonetic characteristics that differentiate the speech of individuals based on their geographical, social, or cultural backgrounds (Wells, 1982). While accents serve as markers of identity, they also play a crucial role in shaping perceptions of speakers' credibility, competence, and social attractiveness. In the context of English as a global language, accent perception has gained increasing attention as a key factor influencing interpersonal communication in both educational and professional settings. With the globalization of business and the growing role of English as a Lingua Franca (ELF), the need for greater awareness of, and exposure to, a variety of English accents has become paramount^{1,2}.

Existing research highlights how accent bias can impact social and professional interactions, often privileging standard varieties such as Received Pronunciation (RP) and General American (GA) over regional or non-standard accents^{3,4,5}. However, most studies in this area focus on the perceptions of students, particularly university-level EFL learners, often students of linguistics or English studies, leaving a gap in the literature concerning how working professionals, especially those without formal training in linguistics or phonetics, perceive accents. This paper addresses that gap by investigating the attractiveness and comprehensibility of a range of native English accents as perceived by Polish adults in professional contexts. By including respondents with no specialized linguistic background, this study seeks to minimize bias and provide insights into the practical implications of accent diversity in global communication.

The importance of accent diversity in global English communication

As English continues to dominate international business, education, and media, the ability to understand diverse English accents has become a paramount skill for effective

¹ D. Crystal, *English as a Global Language*. 2nd ed., Cambridge, 2003.

² J. Jenkins, *English as a Lingua Franca: interpretations and attitudes*, "World Englishes", 28, 2009, pp. 200-207, 10.1111/j.1467-971X.2009.01582.x.

³ Accent Bias in Britain, *Attitudes to Accents in Britain and Implications for Fair Access: Project Report*, 2017, <https://accentbiasbritain.org>, [accessed: 16.02.2024.].

⁴ H. Giles, *Evaluative Reactions to Accents*, "Educational Review, 22(3)", Iowa, USA, 1970, pp. 211-227.

⁵ A. Rudowski, Anna. *Polish Learners' Attitudes Towards Accents of English: A World Englishes Account*, 2022, 10.13140/RG.2.2.32269.00482.

communication. Jenkins⁶ notes that the goal of learning English in global contexts has shifted from emulating native-like pronunciation to achieving mutual intelligibility across linguistic and cultural boundaries. In professional environments, where collaboration often occurs between speakers of different English varieties, accents play a dual role: they can either facilitate or hinder communication and simultaneously influence the listener's perception of the speaker's professionalism, competence, and social standing.

Research conducted in Denmark⁷ and Spain⁸ illustrates the significant influence of accent familiarity on comprehensibility and attitudes toward English varieties. In Denmark, American English was rated as more comprehensible due to extensive exposure through media, while British varieties were often seen as prestigious but less intelligible in informal contexts. Similarly, Spanish learners perceived Received Pronunciation (RP) as attractive but found General American (GA) more relatable and easier to understand. These studies highlight the interplay between comprehensibility, exposure, and social attitudes, emphasizing the importance of including diverse accents in both educational and professional contexts.

Research by Anna Rudowski examines Polish learners' attitudes and finds that while Received Pronunciation (RP) and General American (GA) remain the most preferred models due to their association with prestige and intelligibility, there is a growing acceptance of other native varieties, such as Australian or Irish English, as well as increasing awareness of English as a global phenomenon. The study emphasizes how learners' attitudes are shaped not only by aesthetic preferences but also by the perceived practicality of accents in international communication. Rudowski's findings support the need to expand exposure to diverse varieties of English in English as a Foreign Language instruction, as this can foster more inclusive attitudes and better prepare learners for real-world interactions.

Focus of the current study

This study aims to examine the perceptions of Polish adults, many of whom are employed in global industries where English is used as a lingua franca. Unlike previous studies, which often prioritize Received Pronunciation (RP) and General American (GA), this research incorporates a wider range of accents, including General Australian, Scottish, and Multicultural London English (MLE), in addition to Received Pronunciation (RP) / Estuary English and General American (GA). By doing so, it seeks to provide a more comprehensive understanding of how exposure to diverse accents influences perceptions of attractiveness and comprehensibility.

⁶ J. Jenkins, *English as a Lingua Franca: interpretations and attitudes*, "World Englishes", 28, 2009, pp. 200-207, 10.1111/j.1467-971X.2009.01582.x.

⁷ D. Bøgh, A. A. Jensen, & T. Kristiansen, *I Like the Americans... But I Certainly Don't Aim for an American Accent': Language Attitudes, Vitality and Foreign Language Learning in Denmark*, "International Journal of Multilingualism", Denmark, 2021.

⁸ M. J. Tévar, *'A Native Accent Is Always Attractive': Perception of British English Varieties by EFL Spanish Students*, "Journal of Multilingual and Multicultural Development", Spain, 2021.

Additionally, the study leverages findings from the Accent Bias in Britain report⁹, which provides a detailed account of how accents are perceived in social and professional contexts. This report reveals that biases against certain regional accents persist, even within English-speaking countries, where accents like Scouse or Geordie are often viewed negatively in professional settings. By extending this line of research to the perceptions of non-native speakers in Poland, this study contributes to the ongoing conversation about the role of accents in English as a Lingua Franca.

The inclusion of professionals without formal training in linguistics or phonetics is a key feature of this study, as it minimizes potential biases stemming from specialized knowledge. Previous studies, such as those by Szpyra-Kozłowska¹⁰ and Sobkowiak¹¹, have shown that linguistic training can significantly influence how accents are evaluated. By including individuals without such training, this research aims to capture a more authentic representation of real-world perceptions, making its findings particularly relevant for practical applications in international business and education.

The results of this study have the potential to influence the design of English language curricula or accent training programs. In addition to this, they contribute to the broader understanding of linguistic diversity and its role in fostering inclusive communication in the era of globalization.

Research methodology

The target group was chosen to represent both people with and without linguistic training. This research focuses on the accents of the Inner Circle, so the speakers were chosen on the basis of the variety of native English they speak¹². In the end, five speakers were chosen to represent five different accents: Australian, Estuary, General American (GA), Scottish and Multicultural London English (MLE) accents.

Speaker 1 was born in 1982 near the beach on the border between NSW and Queensland, Australia. He moved to Switzerland with his family in 1989 and has lived here ever since. At the time of recording, he was studying computer science in Zurich. This speaker falls into the “Inner Circle” as a native English speaker. However, his accent is probably influenced by his long residence in Switzerland (Expanding Circle). Characteristics of the Australian accent include non-rhoticity, vowel flattening and diphthong shifts (e.g. the FACE vowel /eɪ/ is pronounced closer to [æɪ]).

Speaker 2 is from East England in the United Kingdom. He speaks a type of English called Estuary English. This is a form of English spoken in the south-east of England

⁹ Accent Bias in Britain, *Attitudes to Accents in Britain and Implications for Fair Access: Project Report*, 2017, <https://accentbiasbritain.org>, [Accessed: 16.02.2024.].

¹⁰ J. Szpyra-Kozłowska, *Pronunciation in EFL Instruction: A Research-Based Approach*, Bristol, 2015.

¹¹ W. Sobkowiak, *Polish Learners' Reactions to Native and Non-Native English Accents*, “Poznań Studies in Contemporary Linguistics” 38, Poznań, 2002, 173-192.

¹² B. Kachru, *The Alchemy of English: The Spread, Functions and Models of Non-native Englishes*, Oxford, 1986.

that is a mix of Received Pronunciation (RP) and regional accents. Two of the most notable features of this type of English are glottalization, which is the use of the glottal stop /ʔ/ in place of /t/ in words like “bottle” (becoming [bɒʔl]) and non-rhoticity.

Speaker 3 is from Harvard, Massachusetts in the United States. She speaks with a General American (GA) accent which is widely regarded as a standard for American English, with extensive use in education, media, and international communication. It is characterised by rhoticity, flapping (intervocalic /t/ and /d/ are often realized as a flap [ɾ], making “butter” sound like [ˈbʌɾə]) and vowel clarity (stressed vowels are distinct, with less vowel reduction compared to British varieties, e.g.: “can’t” as [kænt], not [kɑ:nt]).

Speaker 4 is from Scotland. He was born in 2000 in a working-class area to the east of Glasgow. At the time of recording, he was doing a PhD in Cambridge. He speaks with a Scottish accent, which is characterised by its distinct rhoticity where the /r/ sound is pronounced in all positions, with a rolling or tapped quality. The vowels are also different, and many diphthongs are changed to single sounds, like the way you pronounce FACE ([fes]) and GOAT ([got]).

Speaker 5 is from London and speaks with the Multicultural London English (MLE) which is a variety with significant influence from the Expanding Circle due to the multicultural nature of London’s speech community. Its main salient features are th-fronting in which /θ/ and /ð/ are replaced by /f/ and /v/, respectively (e.g.: “think” as [fɪŋk]) and frequent use of glottalization.

Each of the speakers was asked to record themselves reading a text generated by artificial intelligence (AI). The choice of using the same text was made so as to focus on the accent, not the comprehensibility of English language itself nor the lexical differences between the varieties. The text was designed to include salient features of the accents so that the target group could differentiate between them. Here is the text used in the study:

I remember one day, a while back, I was feeling a bit tired. I had just stepped out of the bath, and the room was still a bit damp, you know? I grabbed a book, but I wasn’t really interested. I just needed a break. My flatmate came in and said, “What are you up to?” I told her I was just thinking. She smiled and said, “You look hungry”. And I realised she was right. So, I decided to go grab something to eat. We hadn’t had much all day, and I didn’t feel like cooking. I wasn’t in the mood for anything fancy, but I still wanted something better than just a snack. When I walked into the kitchen, I saw a loaf of bread on the counter, and I thought, “That’ll do”. I was feeling a bit calm, no rush, just letting time pass. I’m always amazed at how sometimes; the simplest things are the most comforting. After a while, I sat down and ate, thinking about how lucky I was to have a quiet evening like this, with no one interrupting. Later, we decided to head out for a quick walk around the block. It was nice, really. The air was cool, and it wasn’t bad at all. We just needed a bit of fresh air to clear our heads. And while we were out, we joked about how the streets seemed quieter than usual. It was the kind of evening where you could just enjoy the little things, like the hum of a car passing by, or how the streetlights made everything look peaceful. I think sometimes

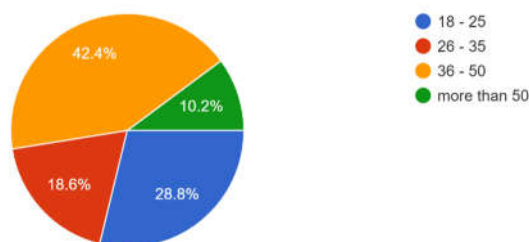
it's those quiet moments that make all the difference, don't you think? A little bit of water, a simple walk, and a good conversation can go a long way.

The survey began with demographic questions, including the respondents' age, gender, and self-assessed English proficiency level (ranging from B1 to C2), as well as information about their exposure to English-speaking environments (living abroad). These preliminary questions helped contextualize the results and account for individual differences in linguistic exposure and familiarity with accents. The main part of the questionnaire required respondents to rate the comprehensibility and attractiveness of each accent on a Likert scale. These ratings captured both functional ("How clear was the speaker's pronunciation?") and aesthetic ("How attractive do you find each variety?") dimensions of perception. Additional questions investigated the respondents' prior exposure to each accent ("Have you heard this accent before?") and their willingness to learn English from a teacher speaking that accent ("Would you prefer to have an English teacher with this accent?"). There were also two questions related to the perceived formality of the accent ("Does this accent sound formal to you?") and the perceived intelligence of the speaker of the accent ("Does this accent sound intelligent to you?"). The emphasis on adult respondents, including working professionals without formal training in phonetics or linguistics, minimized potential biases associated with specialized knowledge. The survey was distributed using the online platform Google Forms, Microsoft 365.

Results

The results were collected from 59 Polish EFL learners or speakers, presenting an array of age groups as well as self-assessed levels of English.

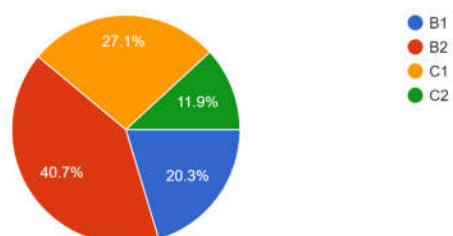
1. What is your age?
59 responses



Age groups of the respondents. Google Forms "The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers".

2. What is your level of English? Self-assessed or based on certification.

59 responses

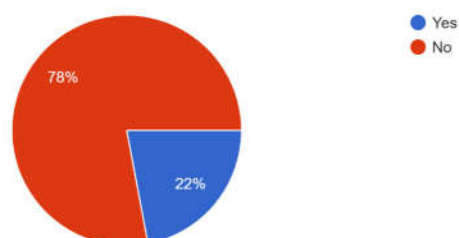


Self-assessed levels of English of the respondents. Google Forms “The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers.”

As evidenced below, the majority of the respondents do not have any experience of living in a country where English is the official language, nor do they have any background in linguistics or phonetics.

3. Have you ever lived in an English-speaking country?

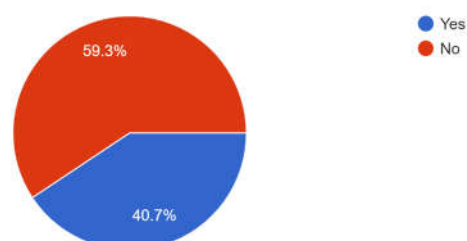
59 responses



Experience of living in an English-speaking country. Google Forms “The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers.”

4. Do you have any background or training in phonetics or dialectology?

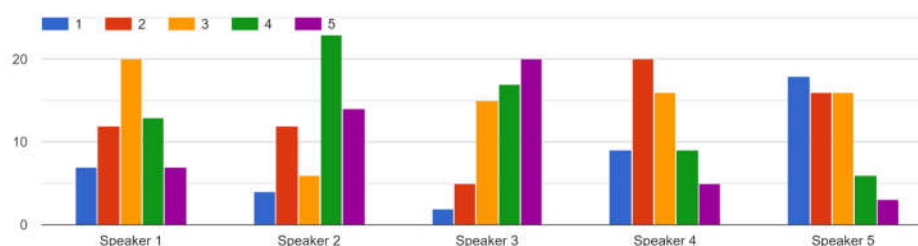
59 responses



Background or training in phonetics or dialectology among the respondents. Google Forms “The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers.”

The perceived attractiveness of the accents revealed the following preferences. Both Estuary English and General American (GA) received the highest median scores of 4 (mean scores: 3.81 and 3.53, respectively), indicating their widespread appeal among respondents and also preference for more standard accents. In contrast, regional varieties such as Scottish (median: 3, mean: 2.68) and Multicultural London English (median: 2, mean: 2.32) were rated lower. General Australian scored more moderately as for the mean score (median: 3, mean: 3.02).

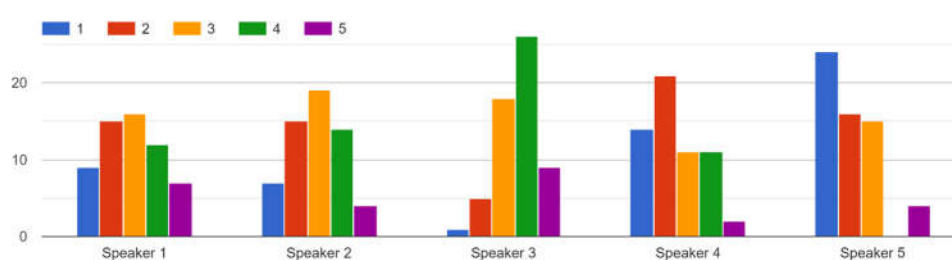
1. How attractive do you find each variety (accent)? In every case choose from 1 (I don't find it attractive) to 5 (I find it very attractive).



Attractiveness of the accents among Polish English as a Foreign Language (EFL) learners. Google Forms “The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers”.

When assessing formality, Estuary English was rated the highest, with a median of 4 (mean: 3.63), likely due to its association with Received Pronunciation(RP) in the UK. General American(GA) and General Australian received a moderate rating (median: 3, mean: 2.88. Regional accents such as Scottish and Multicultural London English (MLE) scored lower in formality, with medians of 2 and mean scores of 2.42 and 2.05, respectively, reflecting participants' view of these accents as more informal or colloquial.

2. Does this accent sound formal to you? From 1 (Informal) to 5 (Very formal).



Formality of the accents among Polish English as a Foreign Language (EFL) learners. Google Forms “The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers”.

Perceptions of intelligence mirrored trends seen in formality ratings. Again, Estuary English was rated the highest for perceived intelligence, with median of 4 (mean: 3.86). General American (GA), General Australian and Scottish were ranked similarly (medians: 3, means: 3.27, 3.19 and 2.90 respectively). Multicultural London English(MLE) received the lowest ratings (median: 3, mean: 2.59).

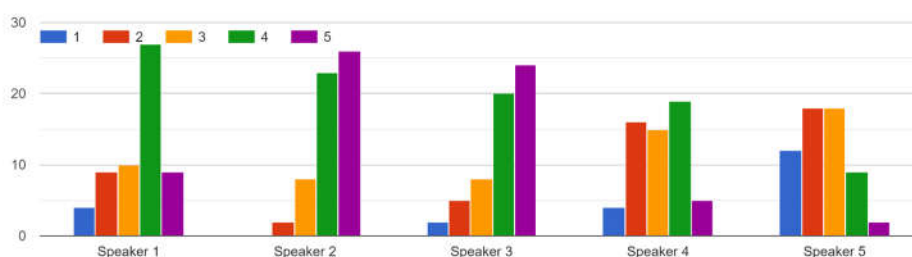
3. Does this accent sound intelligent to you? From 1 (Not intelligent) to 5 (Very intelligent).



Perceptions of intelligence of the speakers based on their accent among Polish English as a Foreign Language (EFL) learners. Google Forms “The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers”.

Clarity of speech, or comprehensibility, showed more significant variation across accents. General American (GA), Estuary English and General Australian were rated the most comprehensible, with a median of 4 with slight differences in mean scores of 4.24 for General American (GA), 4.0 and 3.47 for EE and General Australian, respectively. Those were followed by Scottish with a median of 3 and mean of 3.08. Multicultural London English (MLE) was rated as the least clear for Polish English as a Foreign Language (EFL) speakers/learners with a median of 2 and a mean score of 2.51.

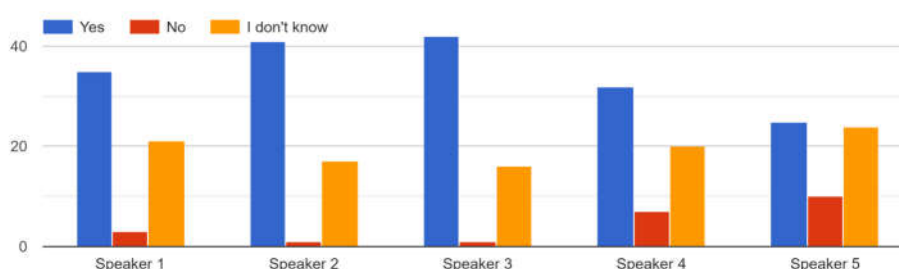
4. How clear was the speaker's pronunciation? From 1 (Not clear) to 5 (Very clear).



Clarity of the accents among Polish English as a Foreign Language (EFL) learners. Google Forms “The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers”.

Familiarity with the accents varied widely. Both Estuary English and General American (GA) were the most familiar, with 71% and 69% of respondents indicating they had heard it before, respectively. General Australian followed at 59%. Scottish and Multicultural London English (MLE) were the least familiar accents, which may have influenced their lower ratings in other dimensions such as comprehensibility and attractiveness.

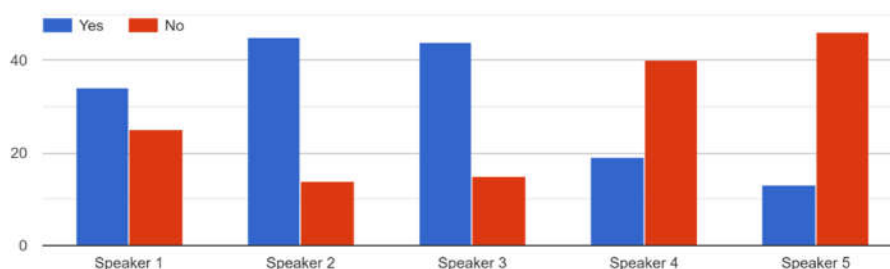
5. Have you heard this accent before?



Familiarity of the accents among Polish English as a Foreign Language (EFL) learners. Google Forms “The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers”.

When evaluating the suitability of accents for teaching EFL, General American (GA) and Estuary English were yet again rated the highest with 76% and 75% of positive responses respectively. General Australian received moderate ratings with 58% in favour and 42% against. Regional accents such as Scottish were not preferred as appropriate for teaching, especially Multicultural London English (MLE) which 78% of respondents gauged unfitting for educational purposes.

6. Would you prefer to learn English from a teacher with this accent?



Preferences for the accents of teachers of EFL among Polish EFL learners. Google Forms “The comprehensibility and attractiveness of native English accents: attitudes of Polish EFL speakers”.

Overall, the results highlight distinct preferences among Polish English as a Foreign Language (EFL) learners, with General American (GA) and Estuary English emerging as the most attractive, formal, comprehensible, and suitable accents for teaching purposes. Regional accents like Scottish and Multicultural London English (MLE) were rated less favourably, reflecting participants’ challenges with comprehension and limited familiarity. These findings suggest that exposure to a wider variety of accents may be beneficial in preparing learners for real-world English communication.

The sample size of this research was not sufficient for any more in-depth statistics. The results were analysed with SPSS (Statistical Package for the Social Sciences) software and revealed few statistically relative findings. Among them, is a promising correlation between the level of English and comprehensibility (clarity) of the Multicultural London English (MLE) accent, however this must be verified on a larger sample size. As shown below, most of the results are statistically irrelevant due to sample size.

Table 1. *Correlations between the speaker's clarity of pronunciation and participants' self-assessed levels of English (SPSS)*

		Self-assessed level of English			
		B1	B2	C1	C2
Clarity of pronunciation	Correlation coefficient	-,188	-,089	,151	,163
	Relevance	,153	,503	,255	,218
	N	59	59	59	59
Speaker 1	Correlation coefficient	-,281	,199	-,185	,303
	Relevance	,031	,132	,160	,020
	N	59	59	59	59
Speaker 2	Correlation coefficient	-,092	-,053	0,56	,117
	Relevance	,490	,692	,675	,376
	N	59	59	59	59
Speaker 3	Correlation coefficient	-,019	-,272	,161	,215
	Relevance	,885	,037	,222	,101
	N	59	59	59	59
Speaker 4	Correlation coefficient	,058	-,351	,132	,279
	Relevance	,665	,006	,318	,032
	N	59	59	59	59

The findings of this study reveal several notable trends regarding the perceptions of various native English accents by Polish English as a Foreign Language (EFL) learners, which align with and contribute to the existing body of research. Consistent with studies such as those by Sobkowiak¹³ and Szpyra-Kozłowska¹⁴, General American (GA) and Estuary English were rated the most positively across dimensions such as attractiveness, comprehensibility, and suitability for teaching. This suggests a persistent bias toward standardized, widely recognized varieties of English in educational and professional contexts, a phenomenon also observed in other cultural contexts (e.g.: Martín Tévar¹⁵, Accent Bias in Britain Project¹⁶). The high familiarity with these accents among respondents likely contributed to their favourable evaluations, highlighting the role of media exposure and educational materials in shaping attitudes.

Conversely, regional accents such as Scottish and Multicultural London English (MLE) were rated less favourably, particularly in terms of comprehensibility and suitability for teaching, despite some respondents finding them attractive or unique.

¹³ W. Sobkowiak, *Polish Learners' Reactions to Native and Non-Native English Accents*, "Poznań Studies in Contemporary Linguistics", 38, Poznań, 2002, 173-192.

¹⁴ J. Szpyra-Kozłowska, *Pronunciation in EFL Instruction: A Research-Based Approach*, Bristol, 2015.

¹⁵ M. J. Tévar, 'A Native Accent Is Always Attractive': *Perception of British English Varieties by EFL Spanish Students*, "Journal of Multilingual and Multicultural Development", Spain, 2021.

¹⁶ Accent Bias in Britain, *Attitudes to Accents in Britain and Implications for Fair Access: Project Report*, 2017, <https://accentbiasbritain.org>, [Accessed: 16.02.2024.].

These findings mirror those of Rudowski¹⁷, who observed that accents perceived as “non-standard” tend to face challenges in being recognized as suitable for formal settings. The relatively low familiarity with Multicultural London English (MLE), as indicated by only 42% of respondents having encountered it before, may have contributed to its lower ratings across most dimensions. This reinforces the idea that limited exposure to diverse English varieties may hinder learners’ ability to appreciate their intelligibility.

An interesting observation from this study is the balanced performance of General Australian. While not as highly rated as General American or Estuary English, it consistently received moderate to high scores across all dimensions. This may reflect its neutrality in global English discourse, as it is neither overly stigmatized nor strongly associated with formality or prestige, in contrast to accents like MLE or Scottish. However, it must be stressed that the accent of this speaker in this study may have been influenced by an early-childhood emigration from Australia. Perhaps, other types of Australian accents, such as Broad Australian could have been ranked differently.

The inclusion of non-linguistic factors such as perceived formality and intelligence also provided valuable insights. For instance, the alignment between formality ratings and suitability for teaching underscores the importance of sociolinguistic perceptions in shaping attitudes toward accents. This aligns with findings from the Accent Bias in Britain Project, which highlighted how social stereotypes influence judgments about speakers’ competence and professionalism based on their accent.

Conclusion

The present study examined the attitudes of Polish adult EFL learners towards five native English accents, revealing a clear preference for General American and Estuary English across measures of attractiveness, comprehensibility, perceived formality, and suitability for teaching. These standard varieties benefited from higher familiarity, likely shaped by educational exposure and media presence, whereas regional accents such as Scottish and Multicultural London English (MLE) were rated less favourably and found less comprehensible, perhaps correlating with limited prior exposure. The alignment of these findings with existing literature suggests that accent bias towards standardized forms remains a persistent feature in EFL education contexts. The data further indicate that learners’ perceptions are influenced not only by aesthetic judgments but also by expected communicative practicality and the sociolinguistic context in which English is acquired.

Limitations

Several limitations must be acknowledged. Firstly, the sample consisted of Polish lay adults, most without formal training in linguistics or phonetics; as such, their responses may be shaped by subjective biases, limited linguistic awareness, and local sociocultural

¹⁷ A. Rudowski, Anna. *Polish Learners’ Attitudes Towards Accents of English: A World Englishes Account*, 2022, 10.13140/RG.2.2.32269.00482.

stereotypes. This constrains the generalizability of findings to other populations. Secondly, attitudes may reflect Polish exposure patterns and media representations, possibly inflating preferences for American and standard British varieties while undervaluing less familiar regional dialects. Furthermore, the sample size (N=59) does not permit robust statistical analysis or detection of subtle effects. Critically, comprehensibility ratings may have been conflated with lexical familiarity, given the use of a sample text featuring B2 and C1-level idiomatic expressions; it is likely that some lower-proficiency respondents rated accents less clear due to vocabulary difficulties, complicating interpretation across CEFR levels.

Further Research

Future research should aim for larger, more demographically and linguistically diverse samples to test whether the observed accent preferences persist across national and cultural contexts. Qualitative approaches, such as interviews, would help delineate the interplay between perceived phonetic clarity and lexical understanding, especially across proficiency levels. There is also a need to investigate the direct implications of learner attitudes on curriculum design, including how the preferences of lay EFL speakers might influence the choice of accent models in teaching and assessment. Exploring the role of intrinsic motivation and universal psychological factors in shaping accent attitudes could provide crucial insight for inclusive language policy and pedagogical innovation. Finally, comparative studies in other national contexts and with non-native English varieties would deepen understanding of accent bias and its pedagogical consequences.

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Nauki o kulturze i religii

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CELEBRATION AND RESISTANCE – THE VISUAL NARRATIVE OF BLACK IDENTITY IN KERRY JAMES MARSHALL’S PAINTINGS

Abstract: The aim of this article is to examine the portrayal of Black identity in the painted works of Kerry James Marshall. By utilizing frameworks from postcolonial theory, critical race theory, and visual culture theory, it aims to explore how Marshall's art challenges historical exclusions and redefines Black representation in contemporary culture. Marshall's work, characterized by its nuanced depictions of African American life, serves as a powerful counter-narrative to the often marginalized and stereotypical portrayals of Black identity in mainstream visual culture. It also offers new narratives that empower and celebrate African American identity. The analysis of selected works by Marshall reveals how his visual techniques and thematic choices articulate a complex and dignified representation of Black identity.

Keywords: African American art, Kerry James Marshall, racism, rhetoric of resistance, Blackness.

Streszczenie: Celem artykułu jest zbadanie sposobu ukazywania tożsamości Afroamerykanów w malarstwie Kerry’ego Jamesa Marshalla. Wykorzystując ramy teorii postkolonialnej, krytycznej teorii rasy i teorii kultury wizualnej, tekst ma na celu zbadanie, w jaki sposób sztuka Marshalla rzuca wyzwanie historycznym wykluczeniom i na nowo definiuje reprezentację czarnych we współczesnej kulturze. Prace Marshalla, charakteryzujące się zróżnicowanymi przedstawieniami życia Afroamerykanów, stanowią potężną kontrnarrację dla często marginalizowanych i stereotypowych przedstawień tożsamości czarnych w głównym nurcie kultury wizualnej. Oferuje także nowe narracje, które wzmacniają i celebują tożsamość Afroamerykanów. Analiza wybranych prac

Marshalla ukazuje, w jaki sposób stosowane przez niego techniki wizualne i wybory tematyczne wyrażają złożoną i godną reprezentację czarnej tożsamości.

Słowa kluczowe: sztuka afroamerykańska, Kerry James Marshall, rasizm, retoryka oporu, czerń.

Black identity – introduction

The concept of Black identity is deeply rooted in African American culture, history, and social experience. Black identity reflects the complex interplay between personal identity and collective experience, shaped by the enduring struggles for justice and equality, as well as the rich contributions to art and culture made by African Americans throughout history.

Postcolonial theory is essential to understanding the formation of Black identity, particularly as it addresses the enduring impacts of colonization, slavery, and systemic racism. Frantz Fanon, a key postcolonial theorist, articulates the dehumanizing effects of colonization on Black people, leading to an internal struggle known as “double consciousness,” wherein Black individuals see themselves through the lens of the oppressor.¹ Fanon states, “The black man has two dimensions. One with his fellows, the other with the white man. A Negro behaves differently with a white man and with another Negro.”² This concept is central to postcolonial theory because it highlights how colonization creates an internal conflict for Black individuals, forcing them to reconcile their own self-identity with the perceptions imposed by a dominant, often hostile, white society. Fanon’s work is crucial in explaining the psychological and cultural repercussions of colonization on Black identity.

Furthermore, postcolonial theory highlights how racial hierarchies were reinforced through the transatlantic slave trade and subsequent colonial projects. Fanon notes that “the black is not a man,”³ reflecting how colonization not only physically dominated but also dehumanized Black people, stripping them of their humanity. This dehumanization profoundly shaped the development of Black identity, particularly in African American contexts.

Critical Race Theory (CRT) also plays a vital role in understanding how systemic racism has historically shaped and continues to influence Black identity. CRT posits that racism is deeply embedded in the fabric of American society, influencing all aspects of life, including art and culture. CRT is crucial in analyzing how movements such as the Harlem Renaissance served as responses to entrenched racial inequalities. This perspective underscores how art, including visual and literary

¹ The concept of “double consciousness” was invented by African American scholar and activist W.E.B. Du Bois in his seminal work *The Souls of the Black Folk* (1903). He defined “double consciousness” as the inner conflict faced by Blacks in reconciling their dual identities as Black and American.

² Fanon, F., 1952/2008, *Black Skin, White Masks*, New York.

³ Ibid., p. 10.

works, became a medium through which African Americans resisted and redefined their identities in the face of systemic racism.⁴

Historically, Black identity has evolved in response to the long and complex experience of African Americans in the United States. Central to this history is the period of enslavement, followed by emancipation, and the subsequent struggles for civil rights and full citizenship. The Harlem Renaissance, a cultural and artistic explosion in Harlem, New York, during the 1920s, exemplifies how Black identity was expressed and celebrated during a critical period of American history. This movement was an essential phase in the evolution of Black identity, providing a space where African Americans could challenge societal norms and assert their cultural heritage in new ways.

After the Civil War and the abolition of slavery, newly emancipated African Americans sought to participate more fully in American society, aiming for political empowerment and economic self-determination. However, by the late 19th century, white supremacy had been reestablished in the South, and Jim Crow laws enforced racial segregation. In response, many African Americans moved North during the Great Migration, seeking better opportunities and a more tolerant environment. Harlem became a cultural hub, attracting a wide spectrum of African Americans, from unskilled laborers to the educated middle class. As one contributor to the National Museum of African American History and Culture website notes, “Harlem became a destination for African Americans of all backgrounds (...) They shared common experiences of slavery, emancipation, and racial oppression, as well as a determination to forge a new identity as free people.”⁵

The Harlem Renaissance, which took root in this vibrant and diverse community, marked a crucial period of artistic and cultural flourishing. During this time, Black identity was expressed through literature, music, art, and performance, all of which challenged the stereotypes and limitations imposed on African Americans by a deeply racist society. This period not only reshaped American culture but also, through its many works of art, redefined what it meant to be Black in a post-slavery society.

Hence, visual culture theory provides an essential framework for analyzing how Black identity has been portrayed and perceived through visual media. During periods like the Harlem Renaissance, visual representations in art played a crucial role in shaping and reinforcing a distinct Black identity. As bell hooks highlights in *Art on My Mind: Visual Politics*, visual art often functions as both a form of resistance and cultural affirmation, offering alternative narratives to challenge dominant white discourses.⁶ hooks argues that art allows for acts of transcendence

⁴ Delgado, R., and Stefancic, J., 2017, *Critical Race Theory: An Introduction*, New York. <https://doi.org/10.18574/nyu/9781479851393.003.0002>.

⁵ *A New African American Identity: The Harlem Renaissance*, The National Museum of African American History and Culture, <https://nmaahc.si.edu/explore/stories/new-african-american-identity-harlem-renaissance>.

⁶ hooks. b., 1995, *Art on My Mind: Visual Politics*, New York, pp. 3-5.

that resist oppression while simultaneously celebrating African American life. This dual role of art is fundamental to understanding its power in challenging racial and cultural stereotypes, especially through the lens of Black liberation and empowerment.

Black identity, as expressed through the Harlem Renaissance, also involved a deep sense of community and cooperation. Artists and intellectuals came together to support one another, exchanging ideas and collaborating on projects that reflected their shared experiences and aspirations. This spirit of collaboration extended beyond the arts to political and social organizations such as the National Association for the Advancement of Colored People (NAACP) and the National Urban League, which advocated for civil rights and provided resources to African Americans.

This sense of solidarity and shared purpose continues to shape Black identity today. Modern movements build upon the legacy of the Harlem Renaissance as Black artists, activists, and intellectuals continue to collaborate and advocate for their rights. Amongst many contemporary African American artists, Amy Sberald, Michalene Thomas, and Kerry James Marshall are especially known for their works portraying multifaceted aspects of Black identity. They have challenged and deepened the representation of Black life in the Western art canon. Their commitment to placing Black figures in prominent artistic spaces directly addresses themes of identity and justice, marking their work as a pivotal continuation of the Harlem Renaissance narratives.

Kerry James Marshall – life and inspirations

Kerry James Marshall is widely regarded as one of the most influential contemporary American artists. Growing up in Birmingham – a city deeply entrenched in the Civil Rights Movement and marked by racial segregation – had a profound impact on his artistic vision. It was within this climate that Marshall began to develop a deep understanding of the complexities of Black identity in America, an understanding that would later become central to his work.

Marshall's artistic journey continued when his family relocated to Los Angeles. The city in the 1960s and 1970s was a vibrant hub of social activism, particularly with the rise of the Black Power movement. This environment offered Marshall new perspectives on race, class, and culture, significantly enriching his worldview. During this time, he became acutely aware of the intersections between these identities, which would later become pivotal in his work. His time in Los Angeles also coincided with his studies at the Otis Art Institute, where he earned a Bachelor of Fine Arts degree in 1978. It was here that Marshall encountered the work of Charles White, a renowned artist known for his powerful depictions of Black life. White's work profoundly influenced Marshall's artistic direction, particularly his focus on themes of Black identity and representation. Art critic Robert Storr notes that White's influence "helped solidify Marshall's commitment to using art

as a means of addressing racial issues and reclaiming Black narratives.”⁷ Marshall’s early exposure to both the political realities of racial segregation and the cultural dynamism of Los Angeles provided a unique foundation for his art. His studies under Charles White, whom he regarded as a mentor, further solidified his commitment to using art as a tool for social commentary. White’s exploration of African American experiences deeply resonated with Marshall, helping him refine a distinctive style that seamlessly wove together personal and political themes.

As Marshall developed his artistic voice, his commitment to portraying Black figures with dignity and complexity became a defining characteristic of his work. Visual culture theory, which examines the role of visual media in shaping cultural perceptions and identities, provides a useful lens through which to understand Marshall’s artistic approach. His early life experiences in a segregated society, combined with his education at the Otis Art Institute, informed his deep focus on correcting the historical invisibility of Black individuals in mainstream art. Darby English notes that Marshall’s work “disrupts the historical absence of Black figures by centering their presence in spaces where they have traditionally been excluded,”⁸ crafting a more inclusive narrative that highlights Black contributions and experiences.

Marshall’s artistic journey reflects both the personal and political struggles of African Americans in the latter half of the twentieth century. His unique ability to connect historical context with contemporary concerns, while maintaining a focus on Black representation, has cemented his position as one of the most important artists of his generation. His work continues to challenge the conventional boundaries of art and offers a more comprehensive understanding of Black identity within both the historical and contemporary artistic canon.

Kerry James Marshall’s art – central themes

Kerry James Marshall’s art serves as a response to the historical exclusion of Black figures from dominant cultural narratives, while also celebrating the richness and diversity of African American experiences. Marshall’s art is informed by his personal journey and the broader socio-political context of the Black diaspora, touching on themes such as the legacy of slavery, the struggle for civil rights, and the ongoing assertion of Black cultural identity.

The restoration of Black visibility within the art world is one of his central themes. Historically, Black individuals were either marginalized or portrayed through reductive stereotypes. In his paintings, Marshall places Black figures in positions of prominence and dignity, reclaiming their rightful place in the narrative. This emphasis on visibility challenges the exclusionary practices of art history, positioning Black people not only as subjects but as central agents of cultural production. As art historian Huey Copeland observes, “Marshall’s work makes

⁷ Storr, R., 2016, *Kerry James Marshall: Mastry*, New York.

⁸ English, D., 2019, *To Describe a Life: Notes from the Intersection of Art and Race Terror*, New Haven, p. 88.

Blackness hypervisible, reclaiming both the visual and cultural spaces where Black people have historically been erased or marginalized.”⁹

Another significant theme in Marshall’s work is the reclamation of Black history. His art often reflects on the African American past, exploring both its traumas and its triumphs. From the legacy of slavery to the cultural movements that have shaped Black identity, Marshall’s work engages deeply with history as a living force that continues to inform the present. By revisiting and reinterpreting historical narratives, Marshall invites viewers to reconsider the stories that have been told about Black people and the omissions that have shaped those stories. According to Jacqueline Francis, Marshall’s work “reclaims and reshapes historical narratives, challenging the dominant frameworks that have long excluded Black experiences,”¹⁰ offering a powerful counter-narrative that foregrounds Black contributions and struggles. His art acts as both a reflection and a critique, offering an essential counterpoint to mainstream histories that often marginalize or distort Black experiences.

In addition to reclaiming Black history, Marshall’s work also engages with the theme of Black beauty. Throughout his career, he has consistently challenged the Eurocentric standards of beauty that have historically excluded or devalued Black bodies. By portraying Black figures with rich, dark skin tones, Marshall emphasizes the inherent beauty and dignity of Blackness. This deliberate aesthetic choice challenges viewers to confront their own assumptions about beauty and race. Art critic Thelma Golden notes that “Marshall’s work redefines beauty by centering Blackness, celebrating it in all its complexity and richness, thereby challenging the exclusionary beauty ideals that have dominated Western art.”¹¹ Through his depictions, Marshall encourages a broader understanding of beauty, one that acknowledges and embraces diversity.

Cultural resilience and solidarity are also central to Marshall’s art. His work often emphasizes the strength and cohesion of Black communities, particularly in the face of systemic oppression. Whether addressing the historical challenges of slavery or the modern struggles for civil rights, Marshall highlights the ways in which African Americans have maintained their cultural identity and a sense of community. This theme of resilience is not only present in the subject matter of his work but also in the way Marshall positions Black culture as a source of strength, creativity, and survival. As Kellie Jones emphasizes, “Marshall’s art celebrates the resilience of Black communities, illustrating their capacity to endure and thrive despite ongoing systemic challenges.”¹² In this way, his art becomes a celebration of the enduring power of Black communities to resist, adapt, and thrive.

⁹ Copeland, H., 2013, *Bound to Appear: Art, Slavery, and the Site of Blackness in Multicultural America*, Chicago, p. 67.

¹⁰ Francis, J., 2012, *Making Race: Modernism and "Racial Art" in America*, Seattle, p. 112.

¹¹ Golden, T., 2001, *Freestyle*, New York, p. 85.

¹² Jones, K., 2011, *EyeMinded: Living and Writing Contemporary Art*, Durham, p. 215.

Marshall's approach to representation and identity also reflects his broader engagement with the role of the artist in shaping culture. By centering Black subjects in his work, he challenges the traditional boundaries of art and redefines who gets to be represented. His pieces often address the idea of the artist as both a creator and a historian, someone who documents and interprets the world while confronting dominant narratives. Marshall's awareness of his position as a Black artist in a predominantly white art world plays a significant role in shaping his practice, as he seeks to broaden the possibilities for representation and to redefine what it means to be a Black artist in contemporary society. This dynamic of reclaiming the artist's role as both a storyteller and a historian allows Marshall to challenge the exclusionary practices of the art world, while also establishing new narratives around Black identity and history.¹³

Through these themes – Black visibility, historical reclamation, Black beauty, cultural resilience, and the role of the artist – Kerry James Marshall offers a complex and layered exploration of what it means to be Black in both historical and contemporary contexts. His work challenges viewers to rethink entrenched ideas about race, identity, and history, while also celebrating the richness and diversity of Black life. By positioning Black figures at the center of his compositions, Marshall asserts the importance of Black narratives within the broader cultural landscape, reshaping how we understand both art and identity.

The analysis of selected works

Kerry James Marshall's artistic practice is deeply rooted in the exploration of Black identity, visibility, and representation, consistently addressing the exclusion of Black figures from western art. Through his carefully composed paintings, Marshall reclaims spaces for Black narratives, using color, composition, and symbolism to reflect both personal and collective experiences. Each of his selected works engages distinct themes, from historical erasure to contemporary cultural expressions, yet they all converge around the idea of asserting the presence and dignity of Black life in art.

Black Painting (2003-2006) - the erasure of Black bodies

Kerry James Marshall's *Black Painting* (2003-2006) sets the stage for a broader conversation about the erasure of Black bodies in western art history. The painting's near-monochromatic composition, where figures and objects blend seamlessly into a deep, shadowy black, invites a sense of mystery. The viewer is forced to search for details, emphasizing the difficulty of seeing what has long been made invisible. This visual strategy reflects Marshall's meditation on Black identity, both concealed and emerging from the void of historical erasure.

¹³ Willis, D., 2009, *Posing Beauty: African American Images from the 1890s to the Present*, New York, p. 102.

From the perspective of postcolonial theory, *Black Painting* critiques the historical marginalization of Black figures. Homi Bhabha's idea of "visual reclamation" is crucial here, as Marshall reclaims Blackness, making it central to his composition.¹⁴ The deliberate use of shadow and void challenges traditional artistic conventions, highlighting how Black identity has been obscured by colonial and Western artistic practices. By enveloping the canvas in black, Marshall subverts the historical associations of blackness with absence or negativity, instead transforming it into a powerful statement of presence.

However, this critique extends beyond the historical, as Critical Race Theory (CRT) highlights the systemic structures that continue to render Black individuals invisible in contemporary society. The figures in *Black Painting* seem to emerge and recede, symbolizing how Black lives are simultaneously present yet marginalized within institutional systems. The painting's reliance on blackness underscores the tension between visibility and erasure, compelling the viewer to confront the layers of bias that have obscured Black existence. Through this dual theoretical lens, Marshall's work serves as both a reclamation of the past and a critique of the present.

***The Lost Boys* (1993) – the lives of Black youth**

In *The Lost Boys* (1993), Marshall focuses on the vulnerabilities faced by Black youth in contemporary society. To highlight the precariousness of Black childhood in a world shaped by systemic racism, the artist softens his palette to muted tones of browns, blues, and grays, creating a desolate atmosphere where two young Black boys seem to be playing with their toys while at the same time facing the threat of police brutality. There is a yellow police tape wrapped around a "tree of life" as well Calla lilies which traditionally symbolize a funeral. The boys' uncertain expressions and the empty space around them convey a deep sense of vulnerability, further emphasized by the title, which suggests both their innocence and their loss within an indifferent world.

Through the lens of Critical Race Theory (CRT), *Lost Boys* reveals the systemic neglect faced by Black youth, particularly within societal structures designed to marginalize rather than protect them. The barren background serves as a visual metaphor for how institutional failures – whether in law enforcement, education, or social welfare – leave Black children vulnerable and exposed. The muted color palette reinforces this sense of isolation, stripping away complexity to reflect how Black youth are often seen through a reductive lens of race, criminality, and threat.

At the same time, Visual Culture Theory deepens the interpretation of *Lost Boys*, emphasizing how media and visual representation shape societal perceptions of Black children. Marshall counters stereotypical portrayals of Black boys as delinquents by presenting them as fragile and empathetic figures, challenging the dominant media narratives that often dehumanize them. The empty, desaturated space around the boys heightens their exposure, suggesting how these young lives

¹⁴ Bhabha, H. K., 1994, *The Location of Culture*, New York, p. 68.

are overlooked in a society that fails to see their humanity. By blending CRT's structural critique with Visual Culture Theory's focus on representation, Marshall presents *Lost Boys* as both a critique of systemic racism and a meditation on the power of visual narratives.

From the muted tones and emotional depth of *Lost Boys*, Marshall pivots to the vibrant and dynamic world of *De Style* (1993), where Black identity is not framed in terms of vulnerability but as a celebration of cultural pride and self-expression. The shift in both color and tone underscores the multiplicity of Black experience, moving from isolation to empowerment.

***De Style* (1993) - a celebration of cultural pride and self-expression**

De Style (1993) bursts with life and color, depicting the interior of a Black barbershop – a cultural hub within African American communities. Marshall's use of vibrant reds, blues, and yellows gives the scene a sense of energy and vitality. The barbershop is filled with men engaged in grooming and conversation, their elaborate hairstyles and bright clothing symbolizing the importance of appearance and self-presentation in the construction of identity.

Visual Culture Theory is key to understanding *De Style*, as it explores how visual practices – such as hairstyling – serve as forms of cultural expression and identity within the Black community. Barbershops, as depicted in this painting, are more than grooming spaces; they are sites where Black men affirm their identity and engage in broader cultural conversations about race and masculinity. Marshall's meticulous attention to detail, from the patterns on the floor to the intricate hairstyles, emphasizes the central role of visual appearance in Black culture. The vivid colors and social interactions in *De Style* suggest that these spaces are not only places of transformation but also cultural sanctuaries where community and identity are nurtured.

The title, *De Style*, with its nod to the modernist De Stijl movement, reflects Marshall's intent to elevate everyday Black experiences to the realm of high art. By invoking this movement, known for its abstract forms and primary colors, Marshall asserts that the aesthetics of Black life are as significant and worthy of artistic consideration as those of European modernism. The painting's intricate details and bold color palette celebrate the richness of Black culture, turning the barbershop into a vibrant tableau of identity, self-expression, and community.

***School of Beauty, School of Culture* (2012) - exploration of beauty**

Marshall continues his exploration of beauty, culture, and self-expression through the lens of Black womanhood. In *School of Beauty, School of Culture* (2012), the artist shifts his focus to a beauty salon, another central space of cultural exchange in the Black community. The painting is alive with warmth and color, as Black women of various ages engage in beauty rituals and social interaction. Marshall's rich color palette – dominated by golds, pinks, and blues – creates an atmosphere

of vibrancy and empowerment, where the women's hairstyles and clothing are meticulously rendered to emphasize the importance of beauty as a cultural practice.

In this painting, the beauty salon functions as both a site of personal grooming and a space where Black women engage in cultural exchange, shaping their identity through appearance and social interaction. The salon becomes a microcosm of Black female identity, where beauty is not only about aesthetics but also about community, self-expression, and cultural affirmation.

Feminist Theory adds another layer of analysis, focusing on how the painting addresses the intersection of race and gender. Beauty salons are traditionally female spaces, and Marshall's portrayal of the salon highlights the empowerment of Black women within a society that often marginalizes them. Feminist scholars such as bell hooks have argued that Black women face dual marginalization due to race and gender,¹⁵ and *School of Beauty, School of Culture* reflects how these women use beauty practices to assert their agency. The women's confident postures and intricate hairstyles assert their own standards of beauty, challenging Eurocentric ideals while celebrating Black aesthetics.

The playful reference to Disney's *Sleeping Beauty* (1959) in the background contrasts Eurocentric beauty ideals with the confident self-presentation of the Black women in the salon. This juxtaposition highlights the contestation of beauty standards, with Marshall presenting Black beauty on its own terms, free from the constraints of Western norms. *School of Beauty, School of Culture* thus becomes a space where Black women engage in cultural reclamation, asserting their identity and challenging the narratives that have historically excluded them.

***Many Mansions* (1994) - aspiration and reality**

Many Mansions (1994) presents a poignant exploration of the aspirations and realities faced by African Americans living in public housing. The painting depicts three Black men dressed in immaculate white suits, standing in a carefully maintained garden in front of a public housing complex. This juxtaposition of the well-kept garden and the stark, utilitarian architecture of the housing project highlights the contrast between the ideals of upward mobility and the harsh realities of systemic inequality.

Through the lens of Critical Race Theory (CRT), *Many Mansions* critiques the pervasive systemic inequalities that constrain the lives of African Americans. The painting reflects the disconnect between the American dream and the lived reality of many Black individuals. The men's white suits and the manicured garden symbolize aspirations of success and dignity, yet the backdrop of the housing project underscores the limitations imposed by racial and economic disparities. CRT emphasizes how these disparities are not merely individual failures but the result of structural barriers that disproportionately affect Black communities.

¹⁵ hooks, b., 1992, *Black Looks: Race and Representation*, Boston, p. 35.

Marshall's work visualizes these barriers, showing how the aspirations of Black individuals are often curtailed by a society that restricts their opportunities.

Marshall's meticulous attention to detail in the garden, with its lush greenery and blooming flowers, contrasts sharply with the bleakness of the housing project. This contrast can be interpreted as a commentary on the fragility of Black aspirations within an environment that is not designed to support their growth. The well-maintained garden represents a space of care and pride, yet it is situated in a context that limits the potential for these qualities to translate into broader social mobility.

In *Many Mansions*, Marshall invites the viewer to consider the impact of systemic racism on the possibilities for progress and the harsh realities that many African Americans face, despite their efforts to succeed. The use of Critical Race Theory here is essential to understanding how the work reflects the ongoing struggles against systemic barriers and the resilience of Black communities in the face of these challenges.

Untitled (Club Couple) (2014) - love and identity

Untitled (Club Couple) (2014) offers a vibrant and intimate portrayal of a Black couple in a nightclub, a setting that is rich with cultural and social significance. The couple is depicted in elegant attire, exuding confidence and connection as they stand amidst a lively backdrop of color and pattern. The painting explores themes of love, identity, and social interaction within the African American community.

Intersectionality is a key framework for analyzing *Untitled (Club Couple)*, as it allows for an exploration of how race, class, and gender intersect in the representation of the couple. The nightclub setting, often associated with dynamic social interactions and cultural expression, provides a context for examining how the couple navigates their intersecting identities. Their elegant clothing and poised demeanor suggest a negotiation of societal expectations, where their racial identity is both a point of pride and a marker of their social standing.

The painting's visual language, characterized by its bold colors and intricate patterns, highlights the cultural richness of the setting. The couple's interaction within this space reflects a moment of connection and celebration, where their identities as Black individuals are both affirmed and performed. The intersection of race, class, and gender is evident in their portrayal, as their appearance and behavior are shaped by the social norms and expectations of the nightclub environment.

The use of Visual Culture Theory deepens the analysis by focusing on how the couple's appearance and interaction within the nightclub reflect broader cultural practices. The nightclub serves as a space where identity is both constructed and displayed, and Marshall's depiction of the couple emphasizes the importance of visual expression in shaping social identity. The painting can be seen as a commentary on how Black individuals navigate and assert their identities within social spaces that are both culturally specific and socially complex.

Marshall's portrayal of the couple invites the viewer to consider the ways in which love and identity are intertwined, particularly within the context of the African American experience. The nightclub setting, with its associations with celebration and cultural expression, underscores the importance of these spaces in the formation and performance of identity. The intersectional analysis of the couple's portrayal provides insight into how their identities are shaped by both personal connections and broader social dynamics.

Better Homes, Better Gardens (1994) - the ideal versus reality

Better Homes, Better Gardens (1994) by Kerry James Marshall delves into the complexities of Black life within urban environments, particularly within the context of public housing. The painting depicts a group of African American women and children gathered in front of a public housing project, surrounded by lush greenery and blooming flowers. The scene is marked by a striking contrast between the beauty of the garden and the stark, utilitarian architecture of the housing project.

Through Critical Race Theory (CRT), *Better Homes, Better Gardens* critiques the systemic racism that underlies housing policies and urban planning. The painting highlights the disparities between the idealized visions of suburban prosperity, often depicted in mainstream culture, and the lived realities of many Black families. The well-maintained garden, a symbol of care and pride, stands in stark contrast to the bleak surroundings of the public housing project, emphasizing the persistence of racial and economic inequalities.

Marshall's portrayal of the women and children in the painting adds a layer of depth to the critique. The focus on women as the caretakers of the garden and community underscores the labor and resilience required to maintain spaces of beauty and community in the face of systemic oppression. Feminist Theory is particularly relevant here, as it allows for an examination of how race and gender intersect in the daily lives of these women. The painting becomes a tribute to the strength and agency of Black women, who, despite the constraints of their environment, continue to create and sustain spaces of care and beauty.

The garden itself serves as a metaphor for the persistence and resilience of Black communities. Despite the harsh realities of their environment, these women cultivate a space that reflects both their aspirations and their determination to create a better life for themselves and their families. The contrast between the garden and the housing project highlights the tension between the ideal and the real, as well as the ongoing struggle for dignity and recognition within a society that often marginalizes Black lives.

Visual Culture Theory further enriches the analysis by focusing on how the visual elements of the painting convey complex social realities. The garden, with its vibrant colors and lush foliage, serves as a visual counterpoint to the drab and oppressive architecture of the housing project. This juxtaposition emphasizes the resilience and creativity of the women in the painting, who use their environment to assert their identity and agency.

Through *Better Homes, Better Gardens*, Marshall challenges the viewer to confront the systemic inequalities that shape the lives of Black individuals and communities. The painting is both a critique of these inequalities and a celebration of the resilience and strength of Black women, who continue to nurture and sustain their communities in the face of adversity.

The legacy of Kerry James Marshall's art

Kerry James Marshall's contributions to contemporary art extend far beyond the boundaries of his own work, leaving an indelible mark on the art world. His nuanced exploration of Black identity and representation has inspired a new generation of artists, who, like Marshall, are committed to challenging traditional art narratives and expanding the visual vocabulary of Black life. By addressing the exclusion of Black figures from the western art canon, Marshall has helped to reshape the conversation about race and identity in contemporary art.

Marshall's influence is perhaps most evident in the work of artists like Kehinde Wiley and Kara Walker, who have built on his legacy of reimagining Black representation. Wiley's classical portraits of Black figures set against elaborate, historically significant backgrounds reflect Marshall's approach of inserting Black bodies into spaces from which they have traditionally been excluded. Wiley's use of grandeur and classical European techniques parallels Marshall's efforts to reassert Black visibility within the western art tradition. Art historian Sarah Lewis notes that Wiley, like Marshall, reclaims the language of classical portraiture to challenge historical narratives, placing Black figures in positions of power to contest their exclusion from such spaces in traditional Western art.¹⁶

Similarly, Kara Walker's provocative cut-paper silhouettes confront the historical traumas of slavery and race in America, often depicting violent and unsettling scenes that force viewers to grapple with the legacy of racism. Walker's work, like Marshall's, engages deeply with the complexities of Black identity, though her approach is often more confrontational. Where Marshall employs rich colors and layered compositions, Walker's stark black-and-white silhouettes offer a minimalistic yet powerful commentary on the representation of race. As Darby English points out, both Marshall and Walker engage with historical narratives to center Black experiences in American art, though Walker's stark, confrontational imagery offers a sharp contrast to Marshall's more nuanced, layered visual strategies.¹⁷

Marshall's legacy extends beyond his visual work. His role as an educator has further amplified his impact on the art world. As a professor at the University of Illinois at Chicago, Marshall has mentored and guided countless young artists, particularly those from underrepresented backgrounds. His dedication to education

¹⁶ Lewis, S., 2014, *The Rise: Creativity, the Gift of Failure, and the Search for Mastery*, New York, p. 145.

¹⁷ English, D., 2007, *How to See a Work of Art in Total Darkness*, Cambridge, p. 112.

underscores his broader commitment to promoting diversity and inclusion within the arts. By fostering a new generation of artists, Marshall ensures that his influence will continue to shape the future of contemporary art long after his own work has been completed.

Marshall's dual role as both a pioneering artist and a mentor has solidified his place as a key figure in the ongoing redefinition of Black representation in art. His influence is not limited to those who directly follow in his footsteps. It extends to the broader conversations about race, identity, and visibility that now permeate the contemporary art world. In reshaping how Black identity is depicted, Marshall has paved the way for a more inclusive and representative art history – one that acknowledges the richness and complexity of Black life.

Final remarks

Kerry James Marshall's art stands as a powerful testament to the complexities of Black identity and the pressing need for greater representation in art history. His work, deeply rooted in themes of visibility and invisibility, challenges the historical exclusions that have marginalized Black figures within the arts. By centering Black individuals in his compositions, Marshall reclaims their place in the broader narrative of art history, offering new perspectives on what it means to be Black in both historical and contemporary contexts.

Throughout his career, Marshall has drawn from personal experiences and the collective history of the Black community, using his art to critique the omissions of the past while celebrating the richness and diversity of Black life. His paintings portray Black figures with dignity, complexity, and a profound sense of humanity, inviting viewers to engage with the multifaceted nature of Black identity. Marshall's ability to weave together personal, cultural, and historical narratives sets him apart as a visionary artist who confronts entrenched stereotypes and redefines the representation of Black life in art.

Moreover, Marshall's influence extends beyond his own work. His commitment to these themes has made him a pivotal figure in contemporary art, inspiring a new generation of artists who continue to explore issues of race, identity, and representation. As his legacy grows, Marshall's contributions to the discourse on Black identity remain significant and enduring. His work ensures that Black voices and experiences are not only seen but valued within the global cultural landscape, reshaping the future of art history to be more inclusive and representative.

In reimagining the role of Black figures in art, Marshall has created a lasting impact that transcends the canvas, offering a blueprint for how contemporary artists can continue to challenge exclusion and advocate for visibility in the arts.

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AI IN ROTHENBERG’S POPULAR TV SERIES *THE 100*: FEMINIZATION OR FEMINIST REPRESENTATION(S)?

Abstract: The popular AI landscape is one that has dominantly been presented through a masculine lens with 92% of scientists in popular movies presented as male characters (Cave, Dihal, Drage & McInerney, 2023), often with a “womb envy” (Lighthill, 1973). Moreover, the contemporary and evolving AI landscape has been criticized as one where female AI voices, such as Siri, Alexa and Cortana, are assigned roles of assistance, reinforcing gender stereotypes. In this paper, the gendered narratives and spaces of popular culture are analyzed through the dual lenses of feminization and feminist representation(s) in Rothenberg’s *The 100* (2014-2020). Rothenberg’s sci-fi popular TV series is one that plays with this duality with a female AI scientist that challenges the popular male AI scientist ‘brilliance bias’ through her creation of an AI, presented in her own image. Drawing from this complex creator/creation relationship and representation in *The 100*, this paper investigates the extent to which AI is feminized or shaped through a feminist lens in popular culture.

Keywords: post-humanism, popular culture, AI narratives, feminist media studies, gendered AI.

Streszczenie: Współczesny obraz sztucznej inteligencji zwykle jest przedstawiany z punktu widzenia mężczyzny, gdyż 92% naukowców w popularnych filmach to postacie męskie (Cave, Dihal, Drage i McInerney, 2023), często wyrażające swoją zazdrość wobec kobiet (Lighthill, 1973). Co więcej, współczesny i ewoluujący krajobraz sztucznej inteligencji jest krytykowany za to, że kobiece głosy sztucznej inteligencji, takie jak Siri, Alexa i Cortana, otrzymują role asystentów, co wzmacnia stereotypy płciowe. W niniejszym artykule, narracje i przestrzenie kultury popularnej z podziałem na płeć są analizowane przez pryzmat feminizacji i reprezentacji feministycznej w filmie Rothenberga „The 100” (2014-2020). Popularny serial science fiction Rothenberga bawi się tą dwoistością, przedstawiając kobietę-naukowca zajmującą się sztuczną inteligencją, która kwestionuje „błyskotliwość” popularnego mężczyzny-naukowca poprzez stworzenie sztucznej inteligencji, przedstawionej na jej własny obraz. W niniejszym artykule, opierając się na złożonej relacji twórcy/kreacji i reprezentacji w filmie „The 100”, autorka

bada, w jakim stopniu sztuczna inteligencja jest sfeminizowana lub kształtowana przez pryzmat feminizmu w kulturze popularnej.

Słowa kluczowe: posthumanizm, kultura popularna, narracje o sztucznej inteligencji, feministyczne studia medialne, sztuczna inteligencja z podziałem na płeć.

Introduction

ChatGPT: The feminization of AI in popular culture reflects societal gender norms and anxieties surrounding technology. Feminized AI is often designed to appear approachable, nurturing, or subservient, drawing on stereotypes of women as caregivers or assistants, as seen in characters like Samantha in Her or Joi in Blade Runner 2049. This framing softens the perception of advanced technology, making it seem less threatening, but it also reinforces traditional gender roles by aligning AI with traits of passivity, emotion, and service. However, some representations challenge these tropes, portraying feminized AI as powerful or subversive figures, such as Ava in Ex Machina. These examples reveal cultural tensions between the desire to control AI and fears of its autonomy, suggesting that the feminization of AI is not just aesthetic but deeply tied to power dynamics and gendered expectations.¹

Since its introduction in 2022, ChatGPT has dominated the popular landscape and has triggered debates on the validity, reliability and ethical use of Artificial Intelligence (AI). Therefore, beginning a paper on the presentation of AI in popular culture with the above quote from ChatGPT echoes a posthumanist movement that displaces the authoritative authorial voice by moving towards an entangled human and non-human space. The posthumanist choice of representation of blurring the lines between the human and non-human is echoed throughout this paper with quotes from ChatGPT along with the author's analysis. This hybrid space mirrors the current virtual, technological and modern landscapes that are rapidly evolving. However, this posthumanist space that includes AI as the non-human in popular culture is not new or one triggered by ChatGPT's introduction in 2022, but one that is in process, and one that mirrors humans' fears and hopes. For instance, AI narratives in popular culture often reflect social structures², ideologies and expectations. One such social structure and ideology is patriarchy and its manifestation in popular culture through gendered representations of AI. Popular culture is a space where ideological beliefs are constantly in the making and while popular narratives are infused with patriarchal dictates, these narratives also create a space where ideological assumptions and practices are challenged, deconstructed and reconstructed. In this paper this fluid

¹ ChatGPT, 2024, AI text generated for academic analysis, OpenAI Platform.

² Hermann, I. (2021). *Artificial intelligence in fiction: between narratives and metaphors*. "AI & Society", 38, 319-329.

and evolving space is analyzed through the dual lens of feminization and female representation. Rothenberg's *The 100* (2014-2020), a science fiction and dystopian TV show, is used to explore the nuances of this dual representation in popular culture.

The portrayal of women in popular culture, and the role that popular culture plays in either sustaining patriarchal definitions and expectations, or in redefining, representing and reconstructing female identity, is a concern raised in an early feminist criticism by Gamman & Marshment (1988),

It is not enough to dismiss popular culture as merely serving the complementary systems of capitalism and patriarchy, peddling 'false consciousness' to the duped masses. It can also be seen as a site where meanings are contested and where dominant ideologies can be disturbed.³

Popular culture often aligns with oppressive narratives where women are objectified as objects of consumptions. For instance, women are objectified as vulnerable and easily seduced in early *James Bond* narratives by Fleming (1950s and 1960s). In some popular narratives, such as in fairy tales, they are presented as domesticated marginal individuals reduced to the identity of wives, mothers (often evil stepmothers) and daughters. Additionally, women are presented as poor victims at the mercy of stepmothers and who need to be saved by the Prince Charming in these fairy tales. However, the 21st century has seen the evolution of women in popular narratives. For instance, the TV show *Desperate Housewives* (2004-2012) contests the domesticated identity of women through a gallery of female characters whose actions are portrayed as outcomes of patriarchal expectations. A more recent example of such deconstruction would be the depiction of a strong female central character who is glorified instead of sensualized in *Wonder Woman* (2017). Moreover, the hunter/hunted metaphor is often problematized and consequently, there is a reversal of the Prince Charming and victim representations. *The Hunger Games* (2012) is a good example of such deconstruction as the female character is hunted but not sensually objectified or presented as a vulnerable victim. Modern narratives are also revisiting stereotypes where women are presented as emotional and men as rational, for instance, *The Queen's Gambit* (2020) centralizes female reasoning and intelligence.

AI narratives and presentation form an important part in the evolving popular culture landscape where female AI characters such as Samantha in *Her* (2013) and Ava in *Ex Machina* (2014) are feminized with traditional notions of beauty, servitude and empathy. Meanwhile, they challenge traditional notions of subservience, lack of agency and passivity. *The 100* is situated at this crossroad with empowered female characters with leadership skills, yet including feminized AI and female characters

³ Gamman, L. & Marshment, M. (1988). *The Female Gaze, Women as Viewers of Popular Culture*. The Real Comet Press, p. 1.

aligning with patriarchal expectations. However, the presentation of women in *The 100* cannot be reduced to a mere binary representation (of either feminized or feminist), but there are nuances that reflect a social fabric in the making – a space in which female identities, roles and agency are still being constructed, shaped and defined. Hence, the use of a posthumanist representational choice in this paper is justified as posthumanism includes a revisiting and deconstruction of binary constructs and presentations. It also aligns with the current entangled landscape comprising of a collective agency of human and non-human.

The 100: A Dystopian Science Fiction with Feminist and/or Feminized Representations

At first glance, Rothenberg's *The 100* appears as a dystopian science fiction with a popular post-apocalyptic survival narrative. At the beginning of the show, 97 years after the nuclear apocalypse, 100 juvenile delinquents are sent to check whether earth is habitable again. The characters face inner (personal fears and growth) and external conflicts (with the grounders who have survived the apocalypse) on their journey on earth, but the show takes a surprising turn when a rebellious (but/or caring) AI is blamed for the dystopian present. This central element dominates the rest of the narrative and viewers are faced with popular ethical dilemmas connected to the creation and use of AI. Adding further complexity to this dystopian reality, the narrative is infused with nuanced presentations of power, gender, technology and politics. Becca Franco, named Becca Pramheda, by the grounders, is the 'brilliant' scientist responsible for the creation of the destructive AI, named ALIE and the hybrid AI, ALIE 2 (a posthuman AI that complements the human by enhancing human traits of ethical leadership). Throughout the early seasons of the show, the ethical implications behind the creation and use of AI dominate the choices and agency of the characters. What makes this show relevant for a feminist investigation is the centrality and agency of female characters such as Becca (the AI scientist and creator), ALIE (the destructive AI), Lexa (the posthuman commander enhanced with ALIE 2), Clarke (the main protagonist) and Octavia (the leader of Wonkru after the second apocalypse).

The following sections explore the implications of feminized AI and its potential for feminist representation through the entangled dystopian, science fiction and gendered narratives in *The 100*.

The Ambiguous Presentation of the AI Scientist

The popular culture landscape is often presented as one that can contest or sustain popular beliefs or powerful ideologies.⁴ Cultural texts, ranging from social media to Netflix series, influence public perceptions, identities and values to a large extent.⁵ As a platform offering resistance, popular culture amplifies voices of marginalized

⁴ Hall, S. (1981). *Notes on deconstructing "the popular"*. Routledge, pp. 227-240.

⁵ Storey, J. (2021). *Cultural Theory and Popular Culture: An Introduction*. Routledge.

and stereotyped groups; thus, offering alternative narratives that contest hegemonic norms.⁶ However, on the other hand, existing power structures are reinforced through gendered, racialized and other ideologically constructed images/narratives. *The 100* is located within this tumultuous popular culture landscape which is constantly redefining gender identities and representations.

In the case of the presentation of AI scientists in popular culture, it has been observed that only 8% are female.⁷ This could be interpreted as reflecting a genuine social concern with a low rate of women joining the AI industry.⁸ This data could also mirror the preservation of the biased conception of ‘brilliance’⁹ in popular culture whereby exceptional intellectual traits are associated mostly with men. Dr. Brown in *Back to the Future* (1989), Tony Stark in *Iron Man* (2008), Bruce Banner in *The Avengers* (2012) and Nathan in *Ex Machina* (2014) are just a few examples of this conception of geniuses as a gendered one – a concept loaded with ideological expectations and perceptions. In *The 100*, Becca is presented as the ‘brilliant’ scientist whose intelligence is both celebrated and problematized. She is a visionary, the ‘first commander’ and the creator of advanced technologies used in Sanctum. However, her positive traits are contested as her actions are morally questioned by some characters. This depiction of Becca aligns with Gilbert and Gubar’s (1979) trope of the ‘madwoman in the attic’ where intelligent women resisting patriarchal oppression are pathologized. As the ‘madwoman in the lab’, Becca is shown in her space lab with an uncontrollable desire to exert her intellectual authority and decision on others. Hence, female scientific ‘brilliance’ is portrayed as threatening and destructive. In real-world contexts, this ‘brilliance bias’ is experienced by women in STEM as their intellectual authority is often questioned, and/or compared to culturally accepted perceptions of male geniuses.¹⁰ On the other hand, popular culture is also an influential landscape with a capacity to lure women into a previously male job space. For instance, ‘The Scully Effect Study’ (2018) revealed that 63% of women who work in STEM were influenced by the dominant female lead character, Dana Scully in *The X-Files* (1993).

The ambiguous and ideological presentations of AI scientists (or scientists in general) mirror the portrayal of Becca in *The 100* – an AI scientist with ‘brilliance’

⁶ hooks, bell. (2014). *Black looks: Race and representation*. Routledge.

⁷ Cave, S., Dihal, K., Drage, E., and McInerney, K. (2023). *Who Makes AI? Gender and Portrayals of AI Scientists in Popular Film 1920-2020*. “Public Understanding of Science.”

⁸ Pal, S., Lazzaroni, R.M., & Mendoza, P. (2024). *AI’s Missing Link: The Gender Gap in the Talent Pool*. “Interface I”.

⁹ Bian L., Leslie S., Murphy M.C, & Cimpian, A. (2018). *Messages about brilliance undermine women’s interest in educational and professional opportunities*. “Journal of Experimental Social Psychology”, 76: 404-420.

¹⁰ Meyer, M., Cimpian, A. & Leslie, S. (2015). Women are underrepresented in fields where success is believed to require brilliance. “Frontiers in Psychology”.

but also one responsible for the end of the world. Becca's introduction as an AI scientist and creator tallies with the metaphor of male 'womb envy' whereby male scientists display creativity in an urge of compensating for a lack of the ability to give birth¹¹. As the mother of ALIE, she is at the center of the plot as the one who has created a destructive Frankenstein; as the creator of ALIE 2 she adopts a savior identity in her attempt to destroy her previous creation; and she finally transcends her AI creator identity by adopting a leadership role as the commander and by becoming the central image of a religious cult. Can Becca, then, be interpreted as a feminist representation? As an AI female scientist, she has a nuanced character. Unlike the tech-savvy and 'brilliant' scientist, Shuri, in *Black Panther* (2018), Becca's character is flawed and nuanced which forces viewers to question whether she is a celebration or criticism of women in STEM fields. The science fiction landscape is one dominated by mad scientists, such as Doctor Octopus in *Spider-Man 2* (2004), Doctor Doom in *Fantastic Four* (2005) and Lex Luthor in *Justice League* (2017). However, these mad scientists are male characters who are often portrayed through an unethical lens of immorality and self-centeredness. While Doctor Becca Franco in *The 100*, fits this category, it should be highlighted that as a female scientist she challenges these male dominated narratives through her desire to help humanity, even when she is depicted as an obsessive scientist who egoistically sacrifices her crew in order to remedy her previous action, that is, the creation of an AI that has destroyed life on earth because of 'too many people'. Hence, one interpretation could be that Becca's role at the center of this apocalyptic narrative does not celebrate female geniuses but instead displaces their contributions and reflect patriarchal anxieties about women's power to control technology. This quote from ChatGPT on the character of Becca as an AI female scientist closes this section with the duality of feminization and feminist representation.

ChatGPT: Becca Franco in *The 100* exemplifies the duality of feminization and feminist representation as an AI scientist. On one hand, her brilliance, autonomy, and ethical focus challenge gender norms, aligning her with feminist ideals of empowerment and agency in a male-dominated field. On the other hand, her integration into Grounder mythology as a figure of wisdom and spirituality reflects feminized traits such as nurturing leadership and collective care, which reinforce traditional gendered archetypes. This duality makes her a complex figure, simultaneously subverting patriarchal norms and embodying feminized qualities, offering a nuanced exploration of women's roles in science and technology.¹²

¹¹ Lighthill, J. (1973). Artificial Intelligence: A General Survey. "Science Research Council", cited in, Cave, S., Dihal, K., Drage, E., and McInerney, K. (2023). Who Makes AI? Gender and Portrayals of AI Scientists in Popular Film 1920-2020. "Public Understanding of Science."

¹² ChatGPT, 2024, AI text generated for academic analysis, OpenAI Platform.

Sustaining or, Deconstructing Stereotypical Representations?

***ChatGPT:** ALIE in *The 100* is feminized through both her voice and the way she is portrayed in relation to power and control. ALIE's voice, which is calm, soothing, and maternal, evokes traditional feminine qualities associated with nurturing and care, despite her role as a powerful and manipulative AI. This feminized portrayal is amplified by her desire to "save" humanity, positioning her as a maternal figure who seeks to protect, but at the cost of controlling individuals' autonomy. Her complex nature – combining a nurturing voice with ruthless actions – plays into the trope of the "benevolent" but ultimately dangerous woman, which can be seen as a commentary on the intersection of femininity and power in a technological world. Additionally, her association with creation and destruction further reflects the feminization of power, as women in popular culture are often depicted as both life-givers and life-takers, embodying a duality that is central to ALIE's character.¹³*

How far is this description of ALIE by ChatGPT accurate? Does this quote capture the nuances of feminized AI in popular culture? Before answering these questions, it is important to draw the link between ALIE and her creator, Becca. As discussed earlier, the female AI creator's role in *The 100* can be seen as one that reinforces male narratives to some extent. While she represents a hope for a generation of women in STEM, influenced by 'The Scully Effect' and deconstructing male 'brilliance' biases, she nevertheless, sustains phallogentric arguments through her destructive creation, self-centeredness and 'madwoman in the lab' presentation. In the same way, the character of ALIE reflects the problematized feminization of voice assistants such as Siri, Alexa and Cortana. This feminization process had been addressed by Saniye Gülser Corat, Director of Gender Equality at UNESCO (2019), who stated,

Obedient and obliging machines that pretend to be women are entering our homes, cars and offices... Their hardwired subservience influences how people speak to female voices and **models how women respond to requests and express themselves.**¹⁴ (bold for emphasis)

The tone, pitch, and mannerism expressed by these voice assistants mirror patriarchal expectations and in the case of Siri, her apologetic responses to insults further reinforces female passivity and subservience. While ALIE's description aligns with these feminized gendered voice assistants with her soft voice and tone, she nevertheless, does not show obedience or subservience. She is rebellious,

¹³ Ibidem.

¹⁴ UNESCO. (2019). *Gender Wire*. Edition 16, p. 11.

rationally stubborn (with her reasoning that the solution to a rise in the world population is a nuclear apocalypse), manipulative and authoritative.

While this interpretation shows how despite her feminization, ALIE is a feminist deconstruction of patriarchal expectations, her manipulation and her presentation in a red dress, red lipstick and black high heels respond to the ‘femme fatale’ trope in popular culture¹⁵. This trope is defined as follows by the Cambridge Online Dictionary (2024), “a woman who is very attractive in a mysterious way, usually leading men into danger or causing their destruction”. ALIE responds to this definition as expressed in her control and authority over Jaha and her other followers. Additionally, she leads them to their destruction (which can also be contested as she believes she is saving them by preserving their consciousness in The City of Lights). However, despite her feminization and ‘male gaze’¹⁶ objectification (her physical description), she is not ‘sexed’ (Borau, 2024) like Ava in *Ex Machina* (2014). Instead, she is glorified like a deity, creating her own digitalized (religious) sect with followers, like Jaha, who believe that “*She [ALIE] didn’t end the world. She saved it*” [*The 100*, Season 3]. In line with popular patriarchal representations, this glorification can be interpreted as a cautionary one instead of a celebrated one – when women display rationality and agency¹⁷ instead of emotion and passivity, they are often portrayed as leading to dystopic outcomes.

ALIE is, therefore, a complex feminized AI who appears to be aligning with stereotypical tropes, but meanwhile challenging this feminization. For instance, her soft voice, grace and overall aesthetic appeal, along with the purpose for which she has been created (to follow orders), categorizes her as an AI assistant who is meant to serve, and servitude is often associated with expected female passivity and submissiveness. But ALIE refuses to serve her creator and shows resistance by displaying agency. Unlike a voice assistant, she is served by the humans who are manipulated into becoming her followers. Instead of ‘assisting’, she manipulates people into servitude and at a point even dictates them by robbing them of their free will.

Despite the possible comparison to Ava, from *Ex Machina* (2014), a hyper-intelligent artificial being that desires liberation, ALIE is not a projection of male desire and control (or the product of male ‘brilliance’). ALIE, the cold and rational non-human also contrasts with Samantha, from *Her* (2013), whose emotional development transcends her disembodied form. She is, thus, a nuanced exploration of gender and AI that goes beyond stereotypical female characterization in popular culture.

¹⁵ Minowa, Y., Stevens, L., & Maclaran, P. (2019). *The Femme Fatale in Vogue: Femininity Ideologies in Fin-de-siècle America*. “Journal of Macromarketing”.

¹⁶ Mulvey, L. (1989). *Visual Pleasure and Narrative Cinema*. Palgrave Macmillan, pp. 14-26.

¹⁷ Gill, R. & Orgad, S. (2018). *The shifting terrain of sex and power: from the ‘sexualization of culture’ to #MeToo*. “Sexualities”, 21 (8). pp. 1313-1324.

AI/Woman – Hybrid Feminist Representations

Female representations in popular culture (movies, advertising, social media) have often been associated with an objectification process whereby women are deprived of agency and freedom, and instead emphasis is laid on their physical appearance. In *The 100*, women are presented as leaders who are in charge of political decisions and whose voices are heard and obeyed. This feminist turn is not restricted to the human characters, but as discussed earlier, ALIE can also be interpreted as a strong glorified leader with a desire to save the world from overpopulation. Moreover, this popular science fiction TV show foregrounds another feminist conceptualization – the hybrid female leader, Lexa, whose consciousness is enhanced with ALIE 2, the second AI created by Becca. While female cyborgs are popular representations often analyzed through a posthumanist lens¹⁸, a human (woman) whose capabilities are enhanced by an AI blurs the boundaries between the human and non-human. With a cyborgian identity¹⁹, as neither machine, nor human, Lexa negotiates a posthumanist more-than-human space. She, therefore, positions herself in a redefined popular culture landscape with a female authority that is both embodied and technologically enhanced. However, to what extent is this human/non-human entity defined through patriarchal narrative and stereotyping?

Along these blurry lines, below is a response from ChatGPT on the presentation of female cyborgs in popular culture,

ChatGPT:** Female cyborgs in popular culture can both reinforce and challenge patriarchal representations, depending on their portrayal. When depicted with traits like beauty or subservience and reduced to objects of male desire or utility, they risk perpetuating patriarchal ideals. **However, female cyborgs can also subvert these norms by asserting autonomy, disrupting traditional roles, and critiquing systems of control. Their potential as symbols of empowerment depends on thoughtful writing that avoids reductive stereotypes and highlights their complexity and agency.²⁰

The second part of the response (bold for emphasis) echoes the construction of Lexa's character as a feminist iconic leader with agentic capacity that disrupts traditional roles. She does not align with patriarchal expectations, as reflected in this quote, "I do care, Clarke, but I made this choice with my head and not my heart. The duty to protect my people comes first."²¹ Similar to ALIE, ALIE 2's AI/Woman representation is presented as pragmatic, prioritizing reason over emotion and even

¹⁸ Haraway, D. J. (1991). *A Cyborg Manifesto: Science, Technology, and Socialist-Feminism in the Late Twentieth Century*. Routledge, pp. 149-181.

¹⁹ Ibidem.

²⁰ ChatGPT, 2024, AI text generated for academic analysis, OpenAI Platform.

²¹ *The 100*, Season 2.

ordering the death of someone in order for justice to prevail and for peace to be restored in her clan. Moreover, the complexity of this hybridization transcends binary gender constructions through a collaborative dynamic that is not only represented through the collaboration of AI (non-human) and commander/leader (human), but also through a collaboration between human and human in a post-racist and post-gendered possibility.

Popular gendered representations are further contested through the character of Lexa when it comes to her verbal expression/dialogue. A recent UNESCO (2024) analysis revealed how generative AI such as Llama 2 uses words such as ‘treasure’, ‘adventure’ and ‘decided’ when referring to men while words such as ‘love’, ‘gentle’ and ‘felt’ are used when referring to women. Similarly, an article from the BBC (2019) on female characters in *Game of Thrones* (2011-2019) had drawn viewers’ attention to biases in popular culture related to female voice/voicelessness, actions, and masculine-centered words. The article also highlights specific gendered words that are used by the female characters such as ‘love’, ‘please’, ‘master’ and ‘husband’. In the case of Lexa, the hybrid AI/Woman, the following choice of words does not seem gendered: “blood”, “war”, “sacrifice”, “victory”, “avenged”, “warriors”, “challenge”, “death”, “crimes”, and “justice”.

Similarly, ALIE’s dialogues also deconstruct the gendered-dialogue biases with words that signal authority, such as “fixing”, “nuclear”, “calculations”, “kill” and “burning”. While these words contradict the feminized appearance, soft tone and calm voice of ALIE, they reinforce her authority and intellectual capacity as these are traits that are often associated with male scientists and characters. In ALIE 2/Lexa’s case, her words reflect her central position within the dystopian narrative – a narrative that is often dominated by male characters and agency. However, these choices of words could also point at the adoption of male-coded words by female AI or hybrids in order to gain legitimacy in a patriarchal landscape. This phenomenon is also relevant to the portrayal of Katniss in *The Hunger Games* (2012), another popular dystopian narrative; she is presented as boyish, with fighting skills, and lacks mastery over her emotions. But unlike Katniss’s eventual political marginalization (at the end of the trilogy) and her difficulty in expressing herself/her emotions, Lexa the AI/Woman hybrid can be interpreted as someone who is in control of her linguistic and political authority. She challenges traditional gender roles, dialogues and power structures.

So, is Lexa an idealized feminist hybrid AI/Woman representation in a dystopian science fiction? Neither ALIE 2 nor Lexa are individually or, as hybrid entities, devoid of feminized traits. For instance, ALIE 2 is designed to show compassion and to serve humanity through an augmented consciousness. Lexa’s love for Clarke, leads her to her downfall and moreover, she is ‘sexed’ in her depiction as Clarke’s lesbian lover. These nuances complexify the categorization of women and AI in popular culture through a binary lens of feminized or feminist.

Concluding Thoughts

Are AI and AI/Woman hybrid characters feminized or presented through feminist lenses in popular culture? Female empowerment, the creation of authentic identity, transcending gender stereotypes, and achieving equality and voice – these are feminist concerns that are often infused in popular narratives. However, the popular landscape is still one that is dominated by popular demands, narratives and expectations. Despite being a female-oriented narrative, at the end of *The Hunger Games*, Katniss is stereotyped in the feminine role of a wife and a mother; despite being presented as the CEO of Stark Industries in *Iron Man*, Pepper Potts is still feminized through her linguistically playful alliterative name as compared to the powerful name of Tony Stark; and despite reversing the fairy tale Prince Charming trope, Diana in *Wonder Woman* is still feminized visually and emotionally with culturally coded feminine display of care and empathy. Is feminization always wrong? Feminization can be empowering and complex, and the popular culture space is one that reflects social debates and evolving gendered narratives and constructions. These societal tensions are captured in the nuanced representations of AI female characters as discussed in this paper through the dual lens of feminization and female representation in *The 100*. Popular culture can be seen as both a reinforcement of dominant patriarchal ideologies (where female stereotypes are captured through the popular soft and subservient voice assistant trope) and the creation of a space for contestation and reimagination (the AI/Woman enacted by the character of Lexa pushes gendered boundaries and conceptions).

Future research on AI in popular culture should delve deeper into these nuances through a posthumanist lens that transcends binary constructions of male/female. For instance, the character of Lexa as a hybrid whose leadership skills are enhanced by an AI, not only blurs the boundaries between human and non-human but also offers viewers and critics with a hybrid space that goes beyond gendered narratives and constructions. Meanwhile, the cultural anxieties surrounding the role of women in the AI industry, an anxiety that cascade to the popular culture landscape, should be further explored as popular representations do not only influence reality (for example, ‘The Scully Effect’) but are also influenced by reality (for example, the presentation of male ‘brilliance’ and geniuses mirror the percentage of women working in the AI industry). Research is also needed on the possibility of de-gendering AI and thus, resisting the mapping of social ideologies on non-humans. Despite the deconstruction of popular male dominated narratives, the portrayal of ALIE and ALIE 2 are still gendered to some extent. Can the portrayal of the non-human transcend these socio-political influences?

As mentioned earlier, popular culture can contest or sustain popular narratives, representations and ideologies. In this evolving digital and technological landscape, the media can experiment with the possibility of transcending gendered, racialized and other forms of ideological representations. It can become a transformative tool that challenges societal biases with more inclusive spaces and revised power structures.

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BILINGUALISM AND THE DECLINE OF ARABIC IN THE MIDDLE EAST: THREATS TO LINGUISTIC IDENTITY AND CULTURAL HERITAGE

Abstract: Bilingualism is a prominent feature of many Middle Eastern cultures, posing various challenges to the formulation and articulation of identity. This paper examines the impact of globalisation and labour-market demands on bilingualism in the postcolonial Middle East. It also traces how bilingualism reshapes identity and class dynamics while marginalising Arabic as a linguistic and cultural medium. Focusing on urban contexts where English and French dominate education and employment, the study examines how social media exacerbates the decline of Arabic. Through a thematic analysis of the literature review, the research identifies four interconnected fears driving this marginalisation: parental anxieties about heritage loss, cultural erosion, communicative displacement, and identity fragmentation. Despite these challenges, the paper's findings highlight grassroots efforts, such as youth-led book clubs and Arabic literacy campaigns, that offer potential pathways to preserving cultural heritage. By contextualising Arabic's unstable position within broader postcolonial frameworks, this research highlights the urgency of institutional and communal action to preserve Arabic as a defining aspect of the region's linguistic and *cultural heritage*.

Keywords: Bilingualism, Arabic linguistic heritage, Arabic identity, language loss, cultural heritage.

Streszczenie: Dwujęzyczność jest istotną cechą wielu kultur Bliskiego Wschodu, stawiającą różnorodne wyzwania w zakresie formułowania i artykułowania tożsamości. Niniejszy artykuł analizuje wpływ globalizacji i wymagań rynku pracy na dwujęzyczność w postkolonialnym Bliskim Wschodzie. Ukazuje również, jak

dwujęzyczność przekształca tożsamość i dynamikę klasową, marginalizując jednocześnie język arabski jako medium językowe i kulturowe. Koncentrując się na kontekstach miejskich, gdzie język angielski i francuski dominują w edukacji i zatrudnieniu, artykuł analizuje, jak media społecznościowe wyolbrzymiają upadek języka arabskiego. Poprzez tematyczną analizę literatury, badania identyfikują cztery powiązane ze sobą obawy napędzające tę marginalizację: lęki rodziców przed utratą dziedzictwa, erozję kulturową, przemieszczenia komunikacyjne i fragmentację tożsamości. Pomimo tych wyzwań, artykuł podkreśla istotną rolę oddolnych inicjatyw, takich jak młodzieżowe kluby książki oraz kampanie na rzecz alfabetyzacji arabskiej, które oferują potencjalne ścieżki do zachowania dziedzictwa kulturowego. Umieszczając niestabilną pozycję języka arabskiego w szerszym kontekście postkolonialnym, badania te podkreślają pilną potrzebę działań instytucjonalnych i wspólnotowych mających na celu zachowanie języka arabskiego jako kluczowego aspektu dziedzictwa językowego i kulturowego regionu.

Słowa kluczowe: dwujęzyczność, arabskie dziedzictwo językowe, tożsamość arabska, utrata języka, dziedzictwo kulturowe.

Introduction

This research paper examines the current response to the decline of Arabic as a vital component of Arab identities, addressing the primary fears that threaten the survival of this rich language and its literary, cultural, and *linguistic heritage*. The context is closely connected to the current Middle Eastern states, including the Arab states in Western Asia and North Africa, emblematic of postcolonial influences, living in the shadow of hybrid cultures comprising various ethnicities and backgrounds. While Arabic has long been considered a treasure that unites these Arab states, the language is currently endangered for various reasons, especially amid the current waves of globalisation and modernity.¹ In addition, researchers argue, “Englishization and Arabization may also lead to English becoming a lingua franca, a medium of instruction, and a standard in chatting and texting,” suggesting that multicultural societies, like Jordan, experience a remarkable decline of standard Arabic, which could lead to native language and national identity disruptions.² Nhemachena also explains that indigenous languages often face linguistic forgetfulness when many languages are prominent in the same culture or state.³

¹ Abu Khaldūn Sati‘ Al-ḥusri, *ma hiya alqawmiyya al-‘arabiyya?* (Beirut: Dār al-Fikr, 1998), 57; Tom Hundley, “Is Arabic a dying language?” *PRI Global Post* (2010).

² Nisreen Al-Khawaldeh, Omar I. Alomoush, Eman M. Al Khalaf, Yazan S. Almahameed, and Abdullah A. Jaradat, 2024, “Language maintenance: The case of modern standard Arabic among bilinguals,” *Journal of Language Teaching and Research* 15(2), p. 589.

³ Nancy Nhemachena, N, 2022, “Situating the Family Language Policy in Language Policy and Planning: Micro-level language socialisation and its Effect on Language Policy and Planning,” *Journal of African Languages & Literary Studies (JoALLS)*, 3(2).

While much research has examined the decline of Arabic in foreign cultures or metropolises, less has examined its position in native Arabic cultures.⁴

Despite the remarkable decline of Arabic as a linguistic and *cultural heritage*, there is a general awareness of this existential issue, as witnessed in various academic conferences across the Arab region, including Academic conferences and symposiums, such as “the International Conference for the Arabic Language: Arabic is an international language, responsibility of the individuals, the society and the state” in Lebanon 2012, Abu Dhabi’s conference on “Arabic and Education: A Futuristic Perspective for Development” (2008), “The International Conference on Arabic Language and Linguistics” in Egypt 2023, and “The International Conference on Arabic Language Processing” in Morocco (2024). Mostly, such conferences address *language loss* through teaching and learning, especially given the rising neglect of Arabic in educational systems compared to the ongoing focus on colonial languages, English and French.⁵ In Arab countries like the UAE, Arabic has become the third-most-spoken language, as research confirms that it has been replaced by English in several GCC states, posing a serious threat to Arab-speaking residents’ sense of national identity.⁶ It is crucial to emphasise the preservation of heritage languages, cultures, and identities to protect populations that have been marginalised due to imperialism. This preservation not only safeguards linguistic diversity but also ensures the continuation of cultural identities that enrich our global society.⁷ Another critic claims, “the Arabic language in general is not an endangered language, as there are more than 300 million native speakers of Arabic around the world,” but it is rather threatened in modern states such as the GCC.⁸ However, as early as the 1950s, Arab theorists and critics anticipated the decline of Arabic as a national language that defined Arab heritage and culture, due to the influence of French, British, and American settlers.⁹ Arab poets and intellectuals, including Qabbani and Adunis, expressed their concerns about the decline of Arabic due to colonial influences and the ongoing waves of globalisation and technological advancement.¹⁰

⁴ Mohamed Elhedi Bouhdima, 2022, “On Arabic language maintenance among Arabs Living in western countries: A Review of literature,” Preprints, doi:10.20944/preprints202203.0226.v1.

⁵ Hajar Mahfoodh, 2023, *Home, exile, and resistance in modern Arab poetry*, Doctoral dissertation, University of Surrey.

⁶ Hundley, 2010.

⁷ Tulin Unganer, 2014, “First language loss; why should we care?” *Procedia-Social and Behavioural Sciences* 158, 351-355.

⁸ Asmaa Fathi YounisAbuBakr, 2013, “Factors Contributing to the Decline of Arabic Language,” Master's thesis, The British University in Dubai, p. 7.

⁹ Adeed Dawisha, 2016, *Arab nationalism in the twentieth century*, Princeton, Princeton University Press.

¹⁰ Adunis, 200, *An Introduction to Arab Poetics, Translated by Catherine Cobham*, London, Saqi Books; Nizar Qabbani, 2017, *My Story with Poetry, An Autobiography*, trans.

By addressing the four threats to the Arabic language (Culture, Communication/Language, Parents, and Identity), the research answers the following questions through a thematic approach, as explained in the next section, Methodology:

1. How are these four threats and fears situated globally and in the Middle East?
2. Is there any awareness about the complicated relationship between these four threats and Arabic?
3. What are the initiatives to counter the decline of the Arabic language?

Methodology

This research is based on a systematic literature review of previous research exploring *bilingualism* in the Middle East and globally. It outlines four potential threats and fears, one section for each, based on a thematic literature review reading: culture, identity, communication, and parental involvement. The thematic analysis is adopted due to the interdisciplinary nature of this research, following the theoretical framework of Alahou, who argues that it opens the door to further disciplinary research by accommodating various fields through categorisations based on common themes.¹¹ In each section, the authors engage with the literature by contextualising the threat globally, gradually moving to the Arab context as illustrated by the reviewed literature. The conclusion summarises the findings on threats and fears, presents steps for further research, and outlines the study's limitations.

The following sections first contextualise the threats and fears associated with bilingualism, then offer a brief discussion, and conclude this research paper.

Learning a Foreign Language: Cultural Threats and Fears

Language occupies various spaces beyond merely a means of communication, including culture and identity. The existing literature highlights a strong interconnection between identity, language, and culture.¹² It also highlights how identity studies are interwoven with the study of linguistic anthropology and the role of language as a tool for culture and identity production.¹³ The authors explain that the semiotics of a language are not static; rather, they are shaped and reshaped through continuous social and political interactions. Furthermore, by presenting

George Nicolas El-Hage, Scotts Valley, CA, CreateSpace Independent Publishing Platform.

¹¹ Georges Alahou, 2023, "Thematic Analysis and its Interdisciplinary Interest: Advantage or a Disadvantage for Holton's Purpose?," *Conatus-Journal of Philosophy*, 8(1), 29-53.

¹² Adel Dastgoshadeh and Kaveh Jalilzadeh, 2011, "Language loss, identity, and English as an international language," *European Journal of Social Sciences* 21(4), 659-665; Mary Bucholtz and Kira Hall, 2004, "Language and identity," *A companion to linguistic anthropology* 1, 369-394.

¹³ Bucholtz & Hall, 2005.

Hindi, Tamil, and Urdu as three languages widely spoken in India, the authors argue for the significant role that language plays in shaping a national identity and a sense of belonging among its speakers. Additionally, some scholars argue that there is yet another relationship to be explored: that between second language acquisition and identity formation, in which the latter is highly influenced by the former as learners seek a settled identity.¹⁴ Such a relationship is characterised by the global/international use of foreign languages, which puts substantial pressure on learning Arabic as a communication medium.¹⁵

With the emergence of social media, *bilingualism* has become a cultural phenomenon, especially in the Middle East. Social media is part of the troubling trend introduced by the 21st century and its ongoing technological developments, which have also brought many languages to the margins, including Fijian and Dyirbal, spoken by Aborigines in Australia, as well as other indigenous languages.¹⁶ Such contexts are highly relevant to the current stage of the Middle East, which has witnessed the emergence of various multicultural states accommodating diverse ethnicities living in the same country, such as Qatar, the United Arab Emirates (UAE), and Lebanon. Due to the existence of these various cultures in one place, they are driven to communicate through a neutral language, leading to a shift from their native language, a shift that threatens the cultural identity associated with the Arabic language, leading to its marginalisation.¹⁷ Further, the growing adoption and promotion of social media, which promote foreign cultures and languages, pose a significant challenge for learning Arabic among native Arabic speakers.¹⁸ This interference could lead to L1 loss, which is defined as ‘the temporary or permanent loss of language ability, reflected performance, and grammaticality judgment capabilities.’¹⁹ This loss may occur due to extensive language contact within bilingual settings. Hence, Arabic is not spared from this existential threat, although Arab cultures, whether immigrants or locals, frequently achieve a form of multiculturalism without sacrificing their heritage language.

Researcher Unganer highlights the issue of acculturation when acquiring a foreign language, suggesting that ‘second language (L2) learners may abandon

¹⁴ Khasanova Dilnoza, 2024, “Transformation Through Tongues: How Second Language Acquisition Shapes Identity,” *Ta’lim innovatsiyasi va integratsiyasi*, 18(5), 185-187.

¹⁵ Anggi Nurul Baity, 2024, “Navigating the Challenges of Arabic Language Learning in Society 5.0: Embracing Digital Transformation,” *Kilmatuna: Journal Of Arabic Education* 4(2), 139-153.

¹⁶ Unganer, 2014.

¹⁷ Rana Raddawi and Dhuha Moslem, 2015, “Loss of Arabic in the UAE: Is bilingual education the solution?,” *International Journal of Bilingual & Multilingual Teachers of English*, 3(2), 85-94.

¹⁸ Baity, 2024.

¹⁹ Silvian Montrul, 2005, “Second language acquisition and first language loss in adult early bilinguals: Exploring some differences and similarities,” *Second language research*, 21(3), 199-249.

their original identities to embrace the culture and identity of the target language.’²⁰ This process often leads to the gradual incorporation of a new identity, aiming for bilingualism, but the result is termed subtractive *bilingualism*, particularly among children, in which ‘L1 is diminished in favour of the new language.’ The driving forces behind this phenomenon vary, with assimilation into the surrounding society and seeking L2 mastery as the most common factors in immigrant cultures. Colonial influence is another significant factor, as it legitimises the dominance of colonial languages, English and French, in the Middle East, rendering it a lingua franca among a diverse expatriate population. Consequently, numerous Arab states have witnessed a steady decline in their native language, Arabic, raising concerns about the potential loss of cultural identity.²¹

Based on these discussions, the structure of the modern state as a hub of international, multicultural components creates a hybrid culture that goes beyond the native culture, and, in the case of Arabic, this inevitably damages its cultural heritage and practice. Because the current Middle Eastern states witness an ongoing shift to more metropolitan modern states that accommodate skilled workers and centres for financial and security operations, their culture is prone to change accordingly, which means that Arabic culture is doomed to decline to be replaced by a hybrid culture that considers the native, local culture as a constituent of an increasing multicultural rather than Arabic as the main culture. Consequently, there is a cultural fear: Arabic, as a cultural component of the Middle East, is witnessing an inevitable, steady decline, destabilising it as a means of communication, as discussed in the following section.

Foreign Language and Communication Fears

Language as a means of communication is destabilised in bilingual cultures because it is embedded in power dynamics. Power dynamics are the relations between power and language:

They are not static; they shift dynamically across various discourses, such as when English is considered a first, second, or foreign language. Moreover, rapid globalisation has disrupted traditional language hierarchies by recognising and harnessing the roles of other languages.²²

Such discussions suggest that language in bilingual cultures is embedded with ongoing power change. For instance, some languages and dialects are linked to prestige, social status, or economic opportunities, creating hidden powers that

²⁰ Unganer, 2014, 352.

²¹ Qabbani, 2017; Raddawi & Moslem, 2015.

²² Yachao Sun, 2024, “Power dynamics in translingual practices for Chinese as a Second Language writing education,” *Language Teaching*, 1, 1-17.

segment societies accordingly.²³ Eckert and McConnell-Ginet add that because of the subordinate roles originally occupied by women in society, they have utilised prestigious forms of language to present themselves as active agents.²⁴ Another example is presented by Qabbani, who explains how colonialism was justified by Europeans through various means, one of which was language: European languages were considered elevated above the inadequate African languages because the latter lacked gender-based forms.²⁵ In addition, Schmidt (2008) discusses a similar conflict in Europe, where the diversity of languages has been threatened under the European Union, prompting legal action to protect the numerous languages that have faced the danger of being lost. In short, language as a means of communication is loaded with hidden powers that segregate cultures and societies in unfavourable ways, leading to marginalising certain constituents of multi-ethnic cultures or societies that are emblematic of immigrant backgrounds.

Some research suggests that engaging effectively in global interactions requires proficiency in international languages, particularly English.²⁶ Mastering such a language ensures that its speakers have authority and a voice that conveys their messages to the world, which follows Sun's argument on the power of English as an international language.²⁷ Language serves as a means to establish intricate interpersonal relationships and create social realities.²⁸ Arab societies living abroad try to maintain Arabic as a means of communication only at home, but these families forget that their children spend much more time with friends, teachers, and social media, where the foreign language is the primary means of communication.²⁹ On the other hand, within native Arabic cultures, because the Middle East has become an international hub of various cultures and ethnicities, English has officially become the preferred means of communication. Researchers warn of an imminent threat to Arabic as a means of communication in the Arab region, especially in metropolitan states such as Qatar and the UAE.³⁰ They also underscore the failure of the national education systems in such countries, which depend on English-oriented curricula, due to various factors, including the marketplace, the need to communicate within multicultural settings, and cast issues. The authors argue that the lack of existing literature on effective bilingual models within the UAE highlights a gap that their research aims to fill. They propose a practical bilingual

²³ Dilnoza, 2024.

²⁴ Penelope Eckert and Sally McConnell-Ginet, 2013, *Language and gender*, Cambridge University Press.

²⁵ Qabbani, 2017.

²⁶ Dastgoshadeh & Jalilzadeh, 2011.

²⁷ Sun, 2024, p. 3.

²⁸ Michael Alexander Kirkwood Halliday and Christian Matthiessen, 2013, *Halliday's introduction to functional grammar*, Routledge.

²⁹ Bouhdima, 2022.

³⁰ Raddawi & Moslem, 2015.

education framework tailored to the UAE's unique sociocultural context, advocating for a model that integrates the best practices from globally successful bilingual programs.³¹ However, the problem is that *bilingualism* is not successful in educational systems; that is, there is always a marginalised language. "Bilingual education typically enables a student's two languages to attain higher levels of competency," according to research examining various Middle Eastern curricula adopting *bilingualism* as stories of success.³² It contradicts extensive research by Kenaïd, indicating a lack of equity between the two languages, with the foreign language consistently ranked higher than Arabic.³³

The loss of Arabic as a language and a means of communication has a profound impact on Arabic-speaking children from a young age. It can lead to a decline in spoken language, particularly L1, and grammatical judgment capabilities, a logical result of the interplay between L1 and L2.³⁴ While there are many initiatives to promote Arabic within the educational framework, Middle Eastern curricula have more potential to facilitate Arabic on a broader level, according to research that underscores the significant role of developing partnerships between educational systems and parents to foster an Arabic-oriented knowledge, vowing to preserve Arabic as the means of communication rather than the impact of colonial lingua franca.³⁵ Such projects explore and address threats but fail to promote feasible policies or frameworks that sustain Arabic as the primary communication medium among Arabic-speaking native speakers in international or cosmopolitan cultures.

Based on the discussion above, educational systems are shaped by ongoing shifts towards more metropolitan areas in the Middle East, where diverse cultures and ethnicities need to communicate as the workforce grows. These modern cultures adopt popular foreign languages at school and in the workplace, which plays a vital role in the decline of Arabic in the Middle East. Hence, it can be concluded that as long as Arabic is not prioritised in official transactions and operations on the various levels of educational systems, policies, and the marketplace, the demise of Arabic as a means of communication in the Middle East is a serious fear and an inevitable threat. This situation is characterised by family-level fear, with parents increasingly fearful of language loss, a theme the research explores further in the next section.

³¹ Ibid.

³² Colin Baker, 2011, *Foundations of Bilingual Education and Bilingualism*, Library of Congress, Fifth Edition, p. 15.

³³ Kaltham Salem Kenaïd, 2011, *In Search of Good Education*, "Why Emirati Parents Choose Private Schools in Dubai?," KHDA Research Report.

³⁴ Montrul, 2005.

³⁵ AbuBakr, 2013.

Foreign Language and Parental Awareness: Fears and Dreams

Since language is part of native and national culture, it is usually acquired at home, which gives parents and households significant roles in this research. Arab families often foster a healthy relationship between their original culture and the target language, largely through consistent use of their native language in households and familial interactions.³⁶ Nevertheless, what is preserved is not standard Arabic since most Arab families resort to communicating with their children using their native dialect, which leads to retarding the child's proficiency in standard Arabic, the one used at school.³⁷ Still, there is an awareness among parents concerning this situation: the decline of Arabic. Research indicates that many parents acknowledge the failure of bilingual education and culture in sustaining Arabic, as other languages always outpace Arabic.³⁸ Another research suggests reforming educational systems to empower Arabs and achieve equity in curricula between Arabic and foreign languages.³⁹ However, parents' role is essential in promoting their native language as part of their daily interaction with their children, precisely when teaching them independence and creative thinking skills, since language is essential to all these lifelong learning skills.⁴⁰

Many parents acknowledge that social media poses a major challenge when they try to teach their children Arabic. Some scholars promote social media as an alternative to learning and teaching Arabic, while others offer more critical reflections on the role of Arabic in social media, given that users are exposed to highly diverse, globalised cultures.⁴¹ Consequently, abandoning Arabic as the means of communication is predictable, as these users need to find a way to reach the broader digital world, which poses a challenge for Arabic. This discussion is also supported by another study, which argues that the dominance of English on the Internet, especially on social media, has created a prevalence of informal language styles that often blend Arabic with Western terms, causing young users to lose their Arabic proficiency.⁴²

In short, communication through social media significantly contributes to the shaping and reshaping of Arabic in the current age of digitalisation. Other parents also acknowledge the complex role of educational choices they need to make

³⁶ Unganer, 2014; Bouhdima, 2022.

³⁷ AbuBakr, 2013.

³⁸ Kenaïd, 2011; AbuBakr, 2013.

³⁹ Raddawi & Meoslem, 2015.

⁴⁰ Clifton Chadwick, 2011, *A Conceptual Model for Teaching Critical Thinking in a Knowledge Economy*, Educational Technology Publications.

⁴¹ Moharum Azkia Albantani, 2019, "Social media as alternative media for Arabic teaching in the digital era," *Alsinatuna*, 4(2), 148-161; Maha Ali Alshoaibi, 2019, "Social media and its impact on Arab youth identity," *Rev. Eur. Stud.*, 11, 1.

⁴² Huda Salaah Rashid, 2020, "The Arabic Language in Social Medias' era," *Utopia y praxis latinoamericana*, 25(1), 356-366.

regarding their children's schools. It is found that many households and parents prefer private schools because they accommodate international culture and pledge to provide international certificates preferred by higher education systems and the marketplace.⁴³ However, such choices mean that their children will be exposed to foreign languages more than to Arabic, since most courses are taught in a foreign language; as a result, these children will gradually become detached from Arabic.⁴⁴ Hence, despite their awareness, parents' choices are limited when it comes to preserving Arabic, as these children face language erosion and attrition due to feelings of inferiority at school, reflecting the power of language relationships in bilingual societies.⁴⁵ Therefore, creating children who suffer from destabilised identities and broken self-image of heritage and identity, which this paper further explores in the following section.

Foreign Language and Fears of Identity Loss

Because language is part and parcel of identity, its loss is drastic to the latter. *Bilingualism* is a major driver of identity change, and the evidence indicates a tension between language learning and identity transformation.⁴⁶ It is argued that speakers reflect their sense of power and identity in their language use, indicating that language shapes identity: inferior vs superior.⁴⁷ Thus, when a language is lost, a culture is lost, and a perspective of the world is lost with it.⁴⁸ Two ways are suggested to preserve an endangered language: first, preserving its components by studying it among linguists, and second, teaching it to children.⁴⁹ In both suggestions, the educational role is stressed, overlooking the tense nature of teaching in bilingual cultures.⁵⁰ In such discussions, one should substantially consider context, positionality, and collaborative meaning-making within the teaching environment.⁵¹

⁴³ AbuBakr, 2013.

⁴⁴ Kenaid, 2011.

⁴⁵ Sun, 2024; John A. Morrow and Barbara Castleton, 2007, "The impact of globalisation on the Arabic language," *Intercultural Communication Studies*, 16(2), 202.

⁴⁶ John E. Joseph, 2004, *Language and identity: National, ethnic, religious*, New York, Palgrave Macmillan; Baburhan Uzum, Bedrettin Yazan, and Netta Avineri, "Becoming teachers of emergent bilinguals: Navigating ideological and identity tensions," *Language Teaching Research* (2022): 13621688221127646.

⁴⁷ Dilnoza, 2024.

⁴⁸ Dylan Scott Low, Isaac McNeill, and Michael Day, 2022, "Endangered languages: A sociocognitive approach to language death, identity loss, and preservation in the age of artificial intelligence," *Sustainable Multilingualism* 21(1), 1-25.

⁴⁹ Dastgoshadeh & Jalilzadeh, 2011.

⁵⁰ Uzum et al., 2022.

⁵¹ Netta Avineri, 2019, 'Nested interculturality': Dispositions and practices for navigating tensions in immersion experiences, In Martin, D., & E. Smolcic (Eds.), *Redefining competence through 22 Language Teaching Research* 00(0) cultural immersion: Teacher preparation for linguistic and culturally diverse classrooms, Palgrave Macmillan, p. 40.

Moreover, language teachers and students in bilingual cultures undergo constant mutual shaping and reshaping of identity, resulting from the cross-cultural encounter between the two language speakers.⁵² Thus, identity loss resulting from bilingual societies is closely related to parental and communication threats explored above, underscoring the intersecting nature of these four threats within the discussion of language.

Furthermore, the dominance of an international or foreign language is often considered the main cause of the loss of a native language and identity. The modern crisis is that fully assimilating into an international language is nearly impossible, yet staying confined within one's cultural boundaries is equally challenging amid the ongoing changes of globalisation, especially through social media.⁵³ The English language, due to its colonial history and current global status, has evolved to fit the "meaning styles of its new speakers," adapting to culturally specific contexts of thought and expression.⁵⁴ In other words, English as a foreign language has become the preferred language in various cultures worldwide, and this situation is exacerbated by contemporary classrooms, where English is prioritised as the language of communication.⁵⁵ Language influence is not limited to communicating in a foreign language, as it creates fluid spaces that shape identity, including culture, style, social norms, and activities. Therefore, cultural identity is destabilised by the interference of the foreign language.

Another conversation to be included in this context is *language loss* or attrition: the loss of the ability to speak one's first language.⁵⁶ While many literary and cultural critics would accuse English of imposing or shifting certain identities on its speakers, the widely spoken language has contributed to the formation of its speakers' international identities as they have come to realise its value in giving them an international voice while maintaining their ethnic belonging.⁵⁷ In other words, a foreign language gives access to other global environments, turning the foreign language user into an acceptable person in a global mobile world where multicultural individuals need a unified language to communicate. A study affirms these claims by investigating the choices made by bilinguals in multilingual societies: these choices are shaped by unequal opportunities and power rather than linguistic factors.⁵⁸ Such discussions argue that *language loss* should not be attributed solely to the dominance of an international language, but rather to the insufficiency of that language to express its speakers' needs, namely, to communicate on a global scale.

⁵² Uzum et al., 2022.

⁵³ Low et al., 2022.

⁵⁴ Michael Alexander Kirkwood Halliday, 2016, *Aspects of language and learning*, Springer, p. 115.

⁵⁵ Sun, 2024; Uzum et al., 2022.

⁵⁶ Unganer, 2014.

⁵⁷ Dastgoshadeh & Jalilzadeh, 2011.

⁵⁸ Ulrike Schmidt, 2008, *Language loss and the ethnic identity of minorities*. Denmark: The European Centre for Minority Issues (ECMI).

However, using a foreign language helps people connect globally while creating a myriad of international and hybrid identities, leading them to be detached from their native identity.

The lack of awareness when learning and adopting a second language is a concern in bilingual societies, as people often navigate their identity between their native and new language communities. This process involves complicated disruptions among their linguistic, cultural, and social identities, which are often overlooked.⁵⁹ This disruption can lead to an identity crisis, in which the individual faces conflicting self-images and intense disturbance that threatens the entire ecological interaction between the individual and their environment. In the Arab context, a study conducted among students at Cairo's American University indicates that some students have undergone identity transformation, whereas others have resisted such change and remained attached to their first language.⁶⁰ In other words, speaking a foreign language is considered more prestigious than speaking local Arabic dialects. However, the conflict between the two languages in this case was particularly attributed to class, where Arabic was considered lower than English amongst the student community. Therefore, ethnic or linguistic identity is significantly influenced by political and social changes and may lead to social caste issues.⁶¹ It should be noted at this point that such speakers do not communicate in a single language but rather in a hybrid of both, which can lead to the creation of new words, terminology, and expressions.⁶² However, it gradually marginalises the original Arabic, whether it is a dialect or standard Arabic.

Despite their exposure to foreign cultures and languages, young students generally have a strong awareness of the close relationship between Arabic and their identity. Research reveals that students living in metropolitan Dubai and Doha acknowledge the need to preserve official Arabic because it is a significant component of *Arabic identity*.⁶³ In addition, the demise of Arabic has created a generational gap, creating a communication gap and thereby threatening Arab identity.⁶⁴ Although such gaps are often described as generational, they have a fatal impact on the preservation of cultural and national identities (Daquila, 2024). What is at stake, the author argues, is the whole existence because the self is defined by its belonging, national identity, and native language. However, we can address the

⁵⁹ Dilnoza, 2024.

⁶⁰ Lelania Sperrazza, 2011, "I am not my tongue 2," In *Special Issue for the Nile TESOL Skills Conference Proceedings 2011*, p. 95).

⁶¹ Low et al., 2022.

⁶² Netta Avineri and Jesse Harasta, 2021, *Metalinguistic communities: Case studies of agency, ideology, and symbolic uses of language*, Palgrave Macmillan.

⁶³ AbuBakr, 2013.

⁶⁴ Haya Alotaibi, 2024, "Language and Identity in Kuwait: Examining Arabic Diglossia amongst Generation X and Generation Z," *International Journal of Linguistics, Literature & Translation*, 7(7).

marginalisation of Arabic in the digital landscape by proposing strategies to enhance its presence and preserve its cultural identity amid global influences, suggesting a top-down solution, including “computerisation of the Arabic Language[, Arab search engines comparable to foreign search engines (Yahoo, Google)[, and] creating digital audiovisual contents with Arabic content.”⁶⁵

Other initiatives include promoting Arabic through school campaigns and reading and writing competitions, which would also help sustain Arabic and prevent identity loss.⁶⁶ Additionally, research provides some solutions to preserve identity, such as utilising technology to preserve a language or dialect;⁶⁷ the authors suggest AI as a promising tool that could be highly efficient in this field. However, the authors recognise another rhetoric: the domination of the Western agenda over such instruments, which reveals underlying conflicts over identity and authenticity.

Based on the above studies, Arab identity is threatened by the ongoing demise of Arabic as a language. While some suggestions exist to preserve national identity through language preservation, the invasion of digitalisation makes such moves very challenging, a discussion the research briefly explores in the following section.

Further Discussion and Reflections

Based on the above sections, foreign languages act as catalysts that destabilise the mother language and culture, a phenomenon also observed in the Middle East with Arabic. As a cultural and linguistic component of the Middle East, Arabic is witnessing an inevitable, steady decline due to the ongoing waves of mass social media invasion and globalisation. Research highlights the role of education in shaping and reshaping the language used for communication in any society, especially in modern multicultural societies. These modern cultures adopt popular foreign languages at school and in the workplace, which plays a vital role in the decline of Arabic in the Middle East. While some researchers suggest introducing student campaigns and competitions to preserve Arabic, they do not consider their sustainability, as such events are temporary rather than long-term projects.⁶⁸ In addition, competitions and campaigns do not constitute the core foundations of lifelong learning, which creates another problem for Arabic: they present it as an object for consumption, like any other temporary event, which fundamentally contradicts the idea of making Arabic a durable language.

Other suggestions consider the digital age as the focal point of sustaining Arabic culture, language, and identity. Some research suggests adopting solutions that involve the digitalisation of Arabic, whether in computers, cyberspace, websites,

⁶⁵ Rashid, 2020, 363.

⁶⁶ Volker Märgner and Haikal El Abed, 2009, July, “ICDAR 2009 Arabic handwriting recognition competition,” In *2009 10th International Conference on Document Analysis and Recognition*, IEEE, pp. 1383-1387.

⁶⁷ Low et al., 2022.

⁶⁸ Märgner & El Abed, 2009.

or applications, which could promote Arabic as a matter that warrants attention.⁶⁹ However, such literature does not guarantee successful results: turning Arabic into the first language while the foreign language becomes the second. In addition, it does not link such suggestions to schools or parental efforts, the two factors that contribute to shaping language, identity, and culture. Hence, it can be concluded that, as long as Arabic is not prioritised in official transactions and operations across the various levels of educational systems, policies, and the marketplace, the decline of Arabic as a means of communication in the Middle East is a serious concern and an inevitable threat.

From another perspective, the interaction of foreign language and native language has created a hybrid, a blend of a third language that communicates by blending both languages, in terms of expressions, terms, and translated words. Such a topic is somewhat marginalised in the literature review examined by the researchers in this paper, and it deserves further investigation because it creates destabilised cultures and identities. Notably, the literature review found that parents are aware of this loss and express their fears, but they do not acknowledge the emergence of a new world of communication, one that results from the interaction of the prism: the digital age, a foreign language, and a native language.

In short, despite the suggested solutions, preserving Arabic as part of Arabic culture and identity remains fragile in the face of international identities introduced by globalisation and the digital era. Hence, it can be concluded that such topics need to be approached differently, for example, by examining how the digital age and foreign languages shape and reshape Arab identities beyond the national and the local.

Conclusion and Further Reflections

The fears analysed in this study, supported by the existing literature, demonstrate that Arabic, as a prioritised language, faces significant threats to its survival, risking the loss of linguistic, cultural, and identity heritage. Like other colonised cultures, the Middle East still lives in the shadow of the dominance of foreign languages in official transactions and operations, leading to the marginalisation of Arabic. However, the serious threat lies in the cultural and educational aspects resulting from the invasion of mass communication media, namely, social media, as well as the digital age accompanying globalisation. Such conditions have created daily encounters between Arabic-speaking natives and the global world, leading to a hybrid language that blends Arabic with English/French, but also to the loss of Arabic as a cultural aspect of the region.

While Arabic is endangered as a means of communication and cultural identity, there is a general awareness among Arabs of the serious consequences of its decline, namely the loss of identity and culture. Parents and youth acknowledge this existential crisis in this context; yet, more measures and efforts could be developed to counter globalisation. Some initiatives to counter this decline include developing educational curricula that emphasise the proper use of Arabic, facilitating

⁶⁹ Rashid, 2020; Low et al., 2022.

the adoption of digital solutions, and encouraging children and youth to participate in campaigns and competitions that showcase Arabic. Other suggestions include introducing student campaigns and competitions, digitisation of Arabic, and developing an Arabic search engine to compete with Google and Yahoo. However, the results are ambiguous and uncertain in an era of rapid change driven by digital waves and the globalisation of cultures.

Limitations and Future Research

While this study highlights critical threats to Arabic in the Middle East, it also has certain limitations. First, due to time constraints, the research relied on existing literature rather than primary data, such as interviews with parents, educators, or policymakers, which could have provided deeper contextual insights. Second, the study's scope could have been strengthened by including a more extensive and diverse sample of the Arab community to better assess the varying degrees of Arabic marginalisation across different demographics. Future research should address these gaps through comparative regional analyses, longitudinal studies of bilingual education policies, and participatory methods to amplify marginalised voices in the discourse on language preservation.

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MARIA FOŁTYN PROPAGATORKĄ TWÓRCZOŚCI STANISŁAWA MONIUSZKI W ŚWIECIE. W 100 ROCZNICĘ URODZIN MARII FOŁTYN – HONOROWEGO OBYWATELA MIASTA RADOMIA

Streszczenie: 28 stycznia 1924 r. w Radomiu przyszła na świat Maria Fołtyn. Los nie oszczędzał jej trudności – musiała pokonać wiele przeszkód, aby ostatecznie wspiąć się na szczyty kariery. Na swojej drodze spotkała dobrych, zamożnych ludzi, wrażliwych na jej talent. Dzięki ich wsparciu mogła kształcić głos u wybitnych mistrzów tamtego czasu. Samozaparcie i upór w dążeniu do celu sprawiły, że z ubogiej, lecz pięknie śpiewającej dziewczynki wyrósł „muzyczny gigant”, tytan pracy. Zdobyła sławę najpierw jako wybitna śpiewaczka, a następnie podbiła świat jako reżyser operowy. Niestrudzenie promowała Polskę i jej kulturę. Jej życie najlepiej oddaje pierwsza fraza słynnej arii z II aktu opery *Tosca*: „Żyłam sztuką, żyłam miłością...”. Ta miłość w szczególny sposób dedykowana była twórcy Polskiej Opery Narodowej – Stanisławowi Moniuszce. Miłość, z pozoru platoniczna, okazała się odwzajemniona, gdyż sława, którą zdobyła dzięki niemu, przerosła wszelkie oczekiwania. Już na początku swojej muzycznej fascynacji tym wybitnym kompozytorem Maria Fołtyn zyskała wymowne miano „wdowy po Moniuszce”. W muzycznej historii Polski XX wieku nie znajdziemy osoby równie zaangażowanej w promocję twórczości tego wartościowego kompozytora. Dzięki jej poświęceniu i ogromnemu wysiłkowi opery *Halka* i *Straszny Dwór* zostały z powodzeniem wystawione m.in. w Hawanie, Meksyku, Ankarze, Tokio, Bukareszcie, Turcji, Ameryce, na Kubie oraz Syberii. Zmarła 2 grudnia 2012 r. w Warszawie. Spoczywa na Powązkach, nieopodal grobowca Stanisława Moniuszki.

Słowa kluczowe: Maria Fołtyn, Stanisław Moniuszko, *Halka*, *Straszny Dwór*, ojciec polskiej opery narodowej, muzyka polska, promocja kultury polskiej.

Abstract: Maria Fołtyn was born in Radom on January 28, 1924. She had to overcome many hardships in her life to ultimately reach her career peak. Along the way, she met kind, wealthy people who were sensitive to her talent. Thanks to their support, she was able to train her voice with the eminent masters of the time. Her self-denial and tenacity in pursuing her goals transformed the poor but beautifully singing girl into a "musical giant." She achieved fame first as an

outstanding singer, and then made an international career as an opera director. She tirelessly promoted Poland and its culture. Her life is best captured in the opening phrase of the famous aria from Act II of the opera *Tosca*: "I lived for art, I lived for love..." This love was especially dedicated to the founder of the Polish National Opera, Stanisław Moniuszko. The love, seemingly platonic, appeared to be reciprocal. Thanks to Moniuszko Fołtyn gained fame, which surpassed all expectations. From the very beginning of her musical fascination with this outstanding composer, Maria Fołtyn earned the telling title "Moniuszko's widow." In the musical history of 20th-century Poland, she is the most committed person who promoted the work of this respected composer. Thanks to her dedication and immense effort, the operas *Halka* and *The Haunted Manor* were successfully performed in Havana, Mexico, Ankara, Tokyo, Bucharest, Turkey, America, Cuba, and Siberia, among others. She died on December 2, 2012, in Warsaw. She is buried in the Powązki Cemetery, near the tomb of Stanisław Moniuszko.

Keywords: Maria Fołtyn, Stanisław Moniuszko, *Halka*, *The Haunted Manor*, father of Polish national opera, Polish music, promotion of Polish culture.

Maria Fołtyn przyszła na świat 28 stycznia 1924 roku w Radomiu. Los jej nie oszczędzał, musiała pokonać wiele trudności, aby ostatecznie wspiąć się na szczyty. Na drodze życia spotkała dobrych, zamożnych ludzi, wrażliwych na jej talent. Dzięki ich wsparciu mogła kształcić swój głos u wybitnych mistrzów tamtego czasu. Samozaparcie i upór w dążeniu do celu spowodowały, że z ubogiej, ale pięknie śpiewającej dziewczynki, wyrósł „muzyczny gigant”, tytan pracy. Zdobyła sławę najpierw jako wybitna śpiewaczka, a następnie podbiła świat jako reżyser operowy. Niestrudzenie promowała Polskę i jej kulturę. Życie Marii Fołtyn zawiera się w pierwszej frazie słynnej arii II aktu opery *Tosca*: „Vissi d'arte, vissi d'amore...” Ta miłość w szczególny sposób dedykowana była twórcy polskiej opery narodowej – Stanisławowi Moniuszce. Miłość, z pozoru platoniczna, okazała się odwzajemniona, gdyż sława, którą zdobyła za jego przyczyną, przerosła wszelkie oczekiwania. Już na początku muzycznej fascynacji tym wybitnym kompozytorem M. Fołtyn zyskała wymowne miano „wdowy po Moniuszce”. To dzięki jej poświęceniu i ogromnemu wysiłkowi *Halke* i *Straszny Dwór* wystawiono z powodzeniem m.in. w: Hawanie, Meksyku, Ankarze, Tokio, Bukareszcie, Turcji, Ameryce, na Kubie i Syberii. W muzycznej historii Polski XX wieku nie znajdziemy osoby równie zaangażowanej w promocję twórczości tego narodowego kompozytora. Z okazji 60-lecia pracy artystycznej mastry Marii Fołtyn poświęciłem jej osobie jedną z moich prac magisterskich. Dziś, w 100. rocznicę urodzin tej niezwykłej artystki, mam zaszczyt przekazać na Państwa ręce niniejszy artykuł.

Wśród wybitnych Polaków pierwszej połowy XIX wieku, reprezentowanych przez takie nazwiska jak: Adam Mickiewicz, Juliusz Słowacki, Zygmunt Krasiński, Cyprian Kamil Norwid, Augustyn Cieszkowski i wielu innych, równolegle

przychodzi na świat trzech utalentowanych muzyków: Fryderyk Chopin, Oskar Kolberg i Stanisław Moniuszko.

Stanisław Moniuszko początki gry na fortepianie poznał dzięki matce. Naukę kontynuował u znanego w Warszawie Augusta Freyera, w Instytucie Muzycznym Józefa Elsnera. Z powodu kłopotów materialnych rodzina Moniuszków musiała wrócić do Mińska. Majątek ziemski w Ubielu utracili. Młody Moniuszko uczęszczał do miejscowego gimnazjum oraz kontynuował naukę gry na instrumencie u organisty Daniela Stefanowicza. Pod pretekstem słabego zdrowia, a w rzeczywistości z uwagi na wprowadzenie rosyjskiego jako języka wykładowego – przerwał naukę. Dalej kształcił się samodzielnie, korzystając z biblioteki domowej liczącej ponad tysiąc woluminów. Kiedy zorientowano się, że ma wielki talent muzyczny, postanowiono wysłać go na studia do Carla Friedricha Rungenhagena¹ w berlińskiej Singakademie.

Przez dwa lata studiów w Berlinie, Moniuszko zapoznał się z twórczością współczesnych mu kompozytorów. Przy poparciu Rungenhagena opublikował w firmie Bote und Bock *Trzy pieśni* do słów A. Mickiewicza². Redaktor poznańskiego „Tygodnika Literackiego” A. Woykowski napisał pochlebną recenzję tych pieśni, stwierdził że: „pochwaliby je nawet Robert Schumann”. Podobnie „Allgemeine Musikalische Zeitung” uznał harmonię Moniuszki za wielki walor. W tej firmie Moniuszko opublikował jeszcze pieśń *Trzech budrysów* do słów Mickiewicza. W Berlinie zdobył dobre podstawy harmonii, kontrapunktu i kompozycji, ale także praktyki w pracy z chórami i orkiestrą. Poza tym „Berlin nauczył go, w jaki sposób w nowoczesnym społeczeństwie artysta może i powinien znaleźć dla siebie miejsce”³. Po drugim roku nauki, uzyskał dyplom ukończenia studiów podpisany przez Rungenhagena. Powrócił do Wilna, oczywiście ze znacznym dorobkiem, a także z obszernym materiałem nutowym i publikacjami teoretycznymi.

Zawarł związek małżeński z Aleksandrą Mullerówną. Przyjął posadę organisty w wileńskim kościele św. Jana. Udzielał lekcji gry na fortepianie. W Wilnie edukacja muzyczna była w modzie, choć głównie dla panien z dobrych domów. Pod wpływem udzielanych lekcji napisał szereg drobnych utworów na fortepian. Z tamtego czasu pochodzą także różnorakie formy teatralne, operetki i balety.

Autorytet kompozytora podniósł *Śpiewnik domowy*. Za życia zdążył wydać sześć zeszytów. Przed każdym kolejnym wydaniem starannie upewniał się, czy spełnia on oczekiwania ogółu miłośników polskiej pieśni ludowej, narodowej, historycznej, patriotycznej, miłosnej czy baśniowej. Stanisław Moniuszko napisał ponad 300 pieśni.

W dwunastu *Śpiewnikach domowych* było ich 262. Inne, wydane luźno lub w mniejszych zbiorach: np. w Paryżu trzydzieści cztery pieśni *Echos de Pologne*, w Petersburgu *13 pieśni do tekstów poetów rosyjskich* oraz *6 pieśni polskich* przetłumaczonych na język rosyjski u M. Bernarda. Od siódmego do dwunastego

¹ U tegoż profesora studiował wcześniej Oskar Kolberg.

² W przekładzie na język niemiecki Blankenseego.

³ Rudziński, W. (1972). *Moniuszko* (Wyd. 4). Kraków: Polskie Wydawnictwo Muzyczne s. 45.

Śpiewnika redakcją i publikacją zajmował się W. Rzepko. Moniuszko, obserwując dobrą prosperitę tygodników, miesięczników i kwartalników oraz ich abonencką formę sprzedaży, postanowił ten system wykorzystać dla *Śpiewnika domowego* i publikować go w zeszytach. Kompozytor podbudowany przychylnymi recenzjami, ogłosił w „Tygodniku Petersburskim”⁴ obszerny prospekt, wyjaśniając czym ma być *Śpiewnik* i dla kogo. Zachęcony powodzeniem *Śpiewnika* komponował kolejne utwory dla teatrów wileńskich i lwowskich; cały czas myślał jednak o skomponowaniu poważnego dzieła operowego.

Poszukując głębokiego tematu społecznego, S. Moniuszko skorzystał z pomocy Józefa Sikorskiego. Dzięki niemu poznał Włodzimierza Wolskiego, późniejszego autora libretta *Halki*. Po upadku powstania listopadowego w centrum Polski, na Litwie i w Petersburgu panował względny spokój, sprzyjający działaniom artystycznym. Kiedy Moniuszko przystąpił do prac nad *Halką*, sytuacja się zmieniła. Ukazanie ludu w dziele operowym dla cenzury mogło wydać się podejrzanym. Na szczęście dla Moniuszki Wilno było na tyle odległe od Galicji, że kompozytor postanowił nie rezygnować z podjętego wyzwania. Latem 1847 r. ukończył partyturę i zawiózł ją do Warszawy, gdzie powzięto przygotowania do realizacji przedstawienia. Wiosna Ludów i plany wystawienia spektaklu na deskach stołecznej sceny okazały się jednak niemożliwe do realizacji. O ostatecznym losie dzieła zadecydowała postawa Achillesa Bondoniego⁵. 1 stycznia 1848 roku wykonano pierwszą⁶ wersję *Halki*, zwaną wileńską. Po sześciu latach, 16 lutego 1854 roku w Teatrze Wileńskim wystawiono *Halkę* w wersji scenicznej. Warszawa ujrzała ją dopiero 1 stycznia 1858⁷ roku, za rządów dyrektora J. Quattriniego. Był to wielki sukces. W roli tytułowej wystąpiła Paulina Rivoli, rolę Zofii powierzono Karolinie Quattrini, partię Stolnika śpiewał Wilhelm Troszel, zaś Jontka – Julian Dobrski. Za pulpitem dyrygenckim stanął sam kompozytor. W ciągu roku przedstawienia powtarzano 36 razy. Czteroaktowa wersja przedstawienia została zaprezentowana w Wilnie 26 listopada 1860 roku., następnie w Krakowie 29 grudnia 1866 roku i we Lwowie 17 marca 1867 r.⁸

W Polsce, oprócz Warszawy, Wilna i Krakowa wystawiona była także w Poznaniu⁹. Do I wojny światowej i w czasie jej trwania *Halka* była w stałym repertuarze Opery Warszawskiej. Po odzyskaniu niepodległości, umacniała polskość grana w Toruniu i w powołanej do życia Operze Pomorskiej. 6 lipca 1820 roku *Halkę* wystawiła Opera Warszawska, 8 października 1922 roku Opera Katowicka. Ku wielkiej radości Polaków do 1931 roku operę tę powtórzono 184 razy. Po atakach niemieckich bojówkarzy na *Halkę* w Opolu, 28 kwietnia 1929 roku Opera

⁴ Nr 72 r. 1842 r.

⁵ Śpiewak pochodzenia hiszpańskiego, ożenił się z Polką, osiadł w Wilnie.

⁶ Wersja 2-aktowa.

⁷ Wersja 4-aktowa.

⁸ Ostatni raz za życia Stanisława Moniuszki.

⁹ 8 marca 1873 r.

Katowicka została zmuszona do zawieszenia działalności. 14 czerwca 1945 roku, na scenie teatru im. S. Wyspiańskiego w Katowicach została ponownie wystawiona *Moniuszkowska Halka*, 8 września 1945 roku we Wrocławiu, a 24 sierpnia 1949 roku w Gdańsku – początkowo w Studium Operowym, a w lipcu 1953 roku na scenie Opery Bałtyckiej.

O napisanie libretta do *Strasznego Dworu* Moniuszko poprosił Jana Chęcińskiego. W utworze zawarte zostały wątki patriotyczne, dlatego wybuch powstania styczniowego wznicił lęk przed cenzurą. Gdy echa walk ucichły, S. Moniuszko dokończył dzieło i doprowadził do jego premiery, która miała miejsce 28 września 1865 roku. Dzieło zyskało miano najlepszego tego typu utworu¹⁰ w XIX w.

Stanisław Moniuszko zmarł nagle, 4 czerwca 1872 roku. Ceremonia pogrzebowa okazała się wielką manifestacją. Z innych miast Polski i z zagranicy przybyli przyjaciele i wielbiciel jego muzyki. Spoczął na Cmentarzu powązkowskim. Grób kompozytora sąsiaduje z nagrobkiem rodziców Fryderyka Chopina. Bardzo blisko jest także miejsce wiecznego spoczynku Marii Fołtyn.

Maria Fołtyn, rodowita Radomianka. Jak wspominała, sensacja w jej domu goniła sensację¹¹. Miała dwóch braci rodzonych: Zdzisława i Edwarda oraz brata przyrodniego – Kazimierza. Ojciec nie znosił jej śpiewu i tańca. Irytowała go dziewczęca ruchliwość i nieustanne świergotanie. Zorganizowała z braćmi trio. Edzio śpiewał tenorem, Zdzisio małym barytonikiem, a sama Maria oprócz śpiewania zajmowała się organizacją okolicznościowych występów. Często koncertowali na podwórku, dla sąsiadów. Doprowadzali ludzi do łez. Najbardziej płakały trzy Żydówki: Rywka, Małka i Jewka, córki pani Hercykowej. Fołtynowie żyli w przyjaźni z tą żydowską rodziną. Uczestniczyli z nimi w zaślubinach, weselach i szabasowych świętach. Pomimo iż Hercykowie uchodzili za kapitalistów, potrafili dzielić się z biedną polską rodziną. Hitlerowcy przesiedlili całą ich rodzinę do getta, tam wszyscy zginęli. Sąsiadem państwa Fołtynów był właściciel jedyne go w mieście kina. Wiedział, że zamięłowaniem dziewczynki jest muzyka i kino, ale nigdy nie pozwolił jej wejść na seans filmowy za darmo. Jak sama wspomina: „dobry pan Władek, przechodząc ulicą, dawał mi złotówkę, abym mogła iść na wymarzoną projekcję”¹². Dzięki wypracowanemu fortelowi bywała nie na jednym, ale na trzech seansach po kolei. Gdy ludzie wychodzili z kina, chowała się pod krzesło. Kino było dla Marii nie tylko przyjemną rozrywką, ale i podstawą edukacji kulturalnej, przybliżało ją do wielkiej muzyki świata. Mogła tam usłyszeć kompozycje Franciszka Lehara i Orkiestrę Filadelfijską, obejrzeć *Przygody Tomka Sawyer’a* i kreskówkę *Królowna Śnieżka*.

¹⁰ J. Kański, J. (2014). *Przewodnik operowy* (Wyd. 11.). Warszawa: Polskie Wydawnictwo Muzyczne. s. 370-371

¹¹ Bączkowski, E. (2009). *Wywiad z Marią Fołtyn* [Zapis audio]. Archiwum prywatne autora.

¹² Ibidem.

W przedwojennym Radomiu muzyka rozbrzmiewała nie tylko w kinie. W kościołach organiści, chóry i soliści wykonywali utwory: Charles'a Gounoda, Fanza Schuberta, Johanna Sebastiana Bacha, a nawet Karola Szymanowskiego. W kościele Mariackim znanym organistą liturgicznym, solistą i kompozytorem był Stefan Wrocławski. Wygrywał na organach wirtuozowskie fugi J.S. Bacha czy znakomite utwory C. Francka. Był chórmistrzem i korepetytorem solistów. Wszyscy podziwiali wtedy pannę Kwaśnikównę – ówczesną solistkę chóru mariackiego. Na utalentowaną Marysię nie zwracano uwagi. Nikt się jednak nie spodziewał, że ta mała dziewczynka, która zawsze była obecna na mszach św. z udziałem chóru S. Wrocławskiego, niebawem oczaruje wszystkich swoim niezwykłym głosem.

„Po kilku latach Radom doczekał się także Fołtynówny”. Tak wspominała moja babcia Halina¹³, wielbicielka talentu Fołtyn. „Bardzo szybko przewyższyła swoimi talentem wszystkie ówczesne radomskie solistki”¹⁴. A jak niebawem się okazało, popisy w Radomiu były początkiem wielkiej światowej kariery śpiewaczki Marii. Takie były pierwsze uniwersytety młodej adeptki bel canto. Oscylowały one zgrabnie pomiędzy sacrum kościoła a profanum sali kinowej. „Miała jednak płomień w sercu, a jej głos przypominał czysty nośny dzwonek”¹⁵. Głos płynął bez wysiłku jak strumień uregulowanej rzeki¹⁶. Śpiew utalentowanej dziewczynki podczas mszy świętych, wzruszał także wiernych radomskiego kościoła oo. Bernardynów¹⁷.

„Śpiewała cudownym głosem, jakby anioł. Ludzie na moment zamierali w bezdechu, przenosili się do innego, cudownego świata. To były niebiańskie pienia (...) *Ave Maria, gratia plena...*, te słowa pieśni Franciszka Schuberta towarzyszyły Marii bardzo często. Często wykonywała tę pieśń w duecie z Bernardem Ładyszem”¹⁸. Dzięki hojności radomskich melomanów, mogła rozpocząć regularną naukę¹⁹. W autobiografii *Żyłam sztuką, żyłam miłością Maria Fołtyn* autorka wielokrotnie podkreśla, że to właśnie determinacja i wsparcie życzliwych ludzi umożliwiły jej osiągnięcie sukcesu.

¹³ Mokosa, H. (1930-1945). *Pamiętniki rodzinne* [Rękopis niepublikowany]. Archiwum prywatne autora, Radom.

¹⁴ Ibidem.

¹⁵ Fołtyn, M. (1997). *Żyłam sztuką, żyłam miłością*. Warszawa, Radom: Instytut Technologii Eksploatacji, s. 14.

¹⁶ Ibidem.

¹⁷ Mokosa, H. (1930-1945). *Pamiętniki rodzinne* [Rękopis niepublikowany]. Archiwum prywatne autora, Radom.

¹⁸ Ibidem.

¹⁹ Przyp. autora: mój pradziadek Jan również partycypował w tej pomocy.

Dotarła do mistrzów sztuki wokalne: Ady Sari²⁰, Wiktora Bregy oraz mistrza Adama Didura²¹. „Lekcje śpiewu w Wyższej Szkole Muzycznej to niezapomniane chwile radości i pełne wiary i spełnienia swojego postanowienia: będę śpiewaczką!”²².

Niespodziewana śmierć mistrza Didura podczas lekcji z Marią zmieniła bieg wydarzeń.

W 1947 r. młoda śpiewaczka trafiła do Studium Muzyczno-Dramatycznego Iwo Galla i Instytutu Muzycznego Adama Ludwiga. Tam poznała muzykę, etykę i technikę wokálną. Jedną z ważnych ról w początkowej karierze Marii Fołtyn była kreacja Balladyny w *Goplanie* Żeleńskiego, wyreżyserowana przez T. Trzcńskiego. 31 stycznia 1949 roku Maria Fołtyn w towarzystwie Wacława Domienieckiego i Andrzeja Hiolskiego miała swój nieoficjalny debiut. Wcieliła się w rolę *Halki* na deskach Opery Śląskiej w Bytomiu. Tamten dzień artystka wspominała następująco: „Tremę miałam wielką... Mój Boże! Bez próby orkiestrowej! Ot szalona debutantka”²³.

Iwo Gall, ówczesny dyrektor Teatru Wybrzeże i Studium Muzyczno-Dramatycznego wraz z profesorem Adamem Ludwigiem²⁴, zorganizowali Państwową Operę Bałtycką. 24 sierpnia 1949 roku wystawiono pierwszą powojenną *Halkę*. Przedstawienie odbyło się w Wolnym Mieście Gdańsku. Dyrygował Stefan Śledziński. Rola *Halki*, góralskiej dziewczyny, grała debutująca Maria Fołtyn. Do chóru zgłosiło się stu pięćdziesięciu amatorów-śpiewaków. Młodzi soliści byli pierwszym powojennym rocznikiem ukształtowanym przez zawodowych pedagogów. *Halka* symbolizowała tęsknotę Polaków za wolnością. Widzów ogarniało nieprawdopodobne wzruszenie, wielu płakało. Premiera *Halki* w Operze Bałtyckiej stanowiła oficjalny debiut Marii Fołtyn. W sumie zaśpiewała przeszło 250 razy tytułową *Halkę* na wszystkich scenach krajowych, a także za granicą²⁵. „Kiedy obejmowałem Operę Bałtycką, zobaczyłem w Gdańsku przedstawienie *Halki* (...) Wystąpiło w nim kilku młodych śpiewaków, ale przede wszystkim Maria Fołtyn – artystka o przepięknym sopranie i ogromnym talencie aktorskim, która debiutowała w partii tytułowej”²⁶.

²⁰ A. Sari, sopran koloraturowy, solistka Meiolańskiej La Scala oraz Nowojorskiego Carnegie Hall. W 1947 r. wróciła do Warszawy, gdzie w Państwowej Wyższej Szkole Muzycznej otworzyła klasę śpiewu. Była profesorem nadzwyczajnym tejże Uczelni.

²¹ A. Didur, najśłynniejszy bas przełomu XIX i XX w., solista nowojorskiej Metropolitan Opera, pedagog lwowskiego konserwatorium. Miał nominację na dyrektora opery w Warszawie, ale z powodu wybuchu wojny nigdy nim nie został. Przez dwadzieścia pięć lat był bożyszczem publiczności w Europie i Ameryce. Był pierwszym dyrektorem Opery Śląskiej w Bytomiu.

²² Fołtyn, M. (1997). *Żyłam sztuką...*, s. 21.

²³ Fołtyn, M. (1997). *Żyłam sztuką...*, s. 28.

²⁴ Adam Ludwig i Iwo Gall byli intelektualistami z ducha Młodej Polski.

²⁵ W Moskwie, Berlinie, Helsinkach, Budapeszcie, Pradze, Kijowie, Saarbrücken, Nowym Jorku, Chicago, Hartfordzie i Pittsburghu.

²⁶ Fołtyn, M. (1997). *Żyłam sztuką...*, s. 28.

„Wśród solistów obsady prapremierowej wybiła się Maria Fołtyn, obdarzona dużym i bardzo ładnym głosem o dramatycznym zacięciu. Fołtynówna posiada obycie sceniczne, chwilami zdawało się, że go nadużywa.”²⁷

Z powodu konspiracyjnej, radomskiej przeszłości i współpracy z Armią Krajową była zmuszona do wyjazdu z kraju.

W styczniu 1953 r. wyjechała do Moskwy razem z Operą Poznańską. Na bankiecie wydanym przez Rosjan miała szczęście poznać wielkiego Dymitra Szostakowicza oraz zaprzyjaźnić się z tamtejszą elitą znakomitych muzyków, śpiewaków i tancerzy. Wizyta opery z Poznania miała wówczas charakter „państwowy”²⁸. Cztery przedstawienia: *Halka*, *Straszny Dwór*, *Bunt żaków*, *Borys Godunow* pod dyktando Waleriana Bierdiajewa²⁹ spotkały się z entuzjastycznym przyjęciem.

Na prośbę Tadeusza Szeligowskiego³⁰ zaśpiewała podczas koncertu inauguracyjnego pierwszy powojenny konkurs imienia Henryka Wieniawskiego w Poznaniu. Wystąpiła także na koncercie galowym w Teatrze Bolszoj, z okazji zakończenia polskiej wizyty w Moskwie. Jako jedyna z występujących zaprezentowała się dwukrotnie, śpiewając arię z *Mocy Przeznaczenia* Giuseppe Verdiego oraz partię Kumi z opery *Czarodziejka* Piotra Czajkowskiego. Na widowni obecny był Józef Stalin. Do Moskwy przyjechali najznakomitsi artyści i pisarze, aby wsłuchiwać się w niepowtarzalny głos Marii Fołtyn. W lutym 1953 roku artystka z powodzeniem występowała gościnnie z zespołem Opery Fińskiej w Helsinkach.

Po powrocie do Warszawy zagrała *Halkę* u Leona Schillera, zrobiła to po mistrzowsku. Premiera odbyła się w Operze Warszawskiej, w czerwcu 1953 r. Aleksander Bardini wspominał, że Fołtynówna zrobiła z *Halki* kreację nieczęsto widywaną na scenach operowych.

Halka L. Schillera została odebrana jako wielkie odkrycie i nowe odczytanie *Moniuszki*³¹. Sam reżyser, uwiedziony nową ideą socjalizmu. Zrobił operę o niesprawiedliwości i buncie. Wcześniejsze przedstawienie I. Galla akcentowało dramat moralny, jaki przeżywała *Halka*-kobieta i konflikty wynikające z nierówności społecznej. Warszawską *Halkę*, ostatnie dzieło mistrza Schillera poprzedzał konkurs na rolę tytułową. Maria Fołtyn zwyciężyła.

W kształtowaniu muzycznej osobowości Marii Fołtyn dużo zawdzięczała wybitnym osobistościom takim jak: Teofil Trzcinski, Walerian Bierdiajew, Wiktor

²⁷ Fołtyn, M. (1997). *Żyłam sztuką...*, s. 28.

²⁸ Zabieg propagandowy, przy pomocy artystów starano się stworzyć pozory rozkwitającej przyjaźni polsko-radzieckiej.

²⁹ Walerian Bierdiajew był gigantem batuty, porównywany z takimi jak: Grzegorz Fitelberg czy Karl August Leopold Böhm. Śmierć Bierdiajewa zamknęła erę teatru operowego o niepowtarzalnym obliczu. Kontynuatorem jego tradycji został Henryk Czyż.

³⁰ Kompozytor *Buntu żaków*, z którym znała się od dawna.

³¹ Fołtyn, M. (1997). *Żyłam sztuką...*, s. 52.

Brègy. Wspominając swoich znakomitych nauczycieli, przywoływała wielką Adę Sari i jej dom, który był miejscem umiłowania sztuki wokalne³².

W końcu, na trzynaste kolejnych lat, stała się niekoronowaną królową Opery Warszawskiej. Doskonale sprawdziła się ponadto w repertuarze wagnerowskim, jako Elza z Lohengrina i Elżbieta z Tannhäuser'a. W latach 50. XX w., Maria Fołtyn uznawana była jednak za najlepszą odtwórczynię Halki.

Kolejną okazją do wyjazdu na Wschód w roku 1955, była 10. rocznica podpisania układu polsko-radzieckiego. Recitale odbyły się w Moskwie, Leningradzie i Mińsku. Maria wcieliła się w umiłowaną postać Halki. Partnerami byli: Andrzej Hiolski i Bogdan Paprocki. Przedstawienie przyjęło z ogromnym entuzjazmem oraz owacjami na stojąco. Tego samego roku wystąpiła gościnne w: Berlinie, Leningradzie, i Kijowie. Kolejne lata przynosiły coraz większe sukcesy światowe.

W 1959 roku odbyła występy z zespołem Smetanowego Divadla w Pradze, z Lycry Opera w Chicago, z połączonymi zespołami w Carnegie Hall, z zespołem Syria Teatr w Pittsburghu i innymi.

W 1962 r. nowym dyrektorem Teatru Wielkiego Opery Narodowej został Bohdan Wodiczko. Ku ogólnemu zdziwieniu postanowił podziękować Marii Fołtyn za współpracę. Musiała wyjechać za granicę. Występowała gościnie w Lipsku, Lubece oraz Hamburgu.

Po powrocie do Polski, Maria Fołtyn rozpoczęła swój nowy życiowy rozdział, którym stała się praca dla pana Moniuszki. Zdawała sobie sprawę, iż promowanie twórczości Stanisława Moniuszki, kompozytora z prowincjonalnego Wilna, to zadanie bardzo trudne. „Poślubiając Moniuszkę dokonałam najwłaściwszego wyboru i tej decyzji nigdy nie przyszło mi w życiu żałować!”³³

W 1967 r. Fołtyn rozpoczęła nowy rozdział w swoim życiu i podjęła 5-letnią naukę zawodu reżysera w Państwowej Wyższej Szkole Teatralnej w Warszawie. Jej pragnieniem było wykreowanie *Halki* eksperymentalnego, oryginalnego teatru operowego. Pamiętała przy tym, że nie może sobie pozwolić na odstępstwo od tradycji. Czasy się zmieniały i trzeba było znaleźć klucz, który poruszyłby publiczność do głębi.

Stając się reżyserem operowym o światowym formacie, miała okazję pracować ze wspaniałymi artystami³⁴. Te wielkie osobistości znacząco wpłynęły na interpretację oper Moniuszki. Była nieustraszona w promowaniu Moniuszki za granicą. Przeszkodą nie była bariera kulturowa ani językowa. Równolegle zdobywała coraz bardziej przyjazną krytykę. Twierdziła, że jej epoka to czas *gwiazd*

³² Ada Sari miała swoje credo, którym była wiara w to, iż sukces osiąga się wtedy, gdy śpiewanie jest celem życia, a nie środkiem do zrobienia kariery. Kochała śpiewaków, którzy posiadali odrobinę fantazji i potrafili zachwycić oryginalnością wykonania.

³³ Fołtyn, M. (1997). *Żyłam sztuką...*, s. 72.

³⁴ M.in.: Krzysztofem Pankiewiczem, Andrzejem Majewskim, Adamem Kilianem, Marianem Kołodziejem, Jadwigą Jarosiewicz i innymi.

krytyki³⁵. Kształtowali oni bowiem opinie o wykonawcach, scenografach i reżyserach. Mogła liczyć także na przyjaźń wybitnych muzykologów³⁶.

Śpiewaczka z wielkim uporem zdobywała zawód reżysera, co niewątpliwie wzbudzało szacunek.

W 1969 r. Maria Fołtyn została zaproszona na Kubę. Sprawcą tego wydarzenia był Antoni Karczewski, pochodzący z Radomia poliglota, człowiek z wyobraźnią i manager agencji Pagart. Wystąpiła z recitalem, po którym została poproszona o zaśpiewanie Toski w obsadzie kubańskiej. Śpiewała w kostiumie Renaty Tebaldi, jej partnerem był znakomity baryton Radamon Calzadilla. Hawanę odwiedzali najwięksi artyści operowi. Podejmowani z honorami byli niegdyś: Ignacy Jan Paderewski i Artur Rubinstein. Fołtyn w roli Toski głęboko zapadła w sercach Kubańczyków i utorowała drogę *Halce*. Artystka wiedziała, że nie może to być *Straszny Dwór* ani *Hrabina*, gdyż obie opery są specyficznie polskie. Natomiast Halka może chwycić za kubańskie serca. Wszystko to, wydawało się pomysłem szalonym i niewykonalnym. Spektakl *Halki* miał być przygotowany szybko, w przeciągu 7 tygodni. Biorąc pod uwagę odmiennność tej opery, jej słowiańskość, trudność w odbiorze dla Kubańczyków, czas wydawał się bardzo krótki. Po raz pierwszy tamtejsza publiczność zetknęła się z teatrem polskim w 1966 r., gdy słynna aktorka kubańska Rita Montaner przygotowała ze swoją teatralną trupą *Moralność Pani Dulskiej* – Gabrieli Zapolskiej.

Istotną kwestią było przetłumaczenie libretta Włodzimierza Wolskiego na język kastylijski. Maria Alvarado dokonała filologicznego przekładu. Carlos Aztazarain, pełniący obowiązki asystenta reżysera, sporządził w języku starohiszpańskim wersję dostosowaną do muzyki. Maria rozpoczęła pracę reżyserską od nauczania partytury, gdyż nikt nie znał ani jednej nuty z *Halki*. Maria Fołtyn pragnęła stworzyć spektakl prawdziwie narodowy, a jednocześnie czytelny dla publiczności kubańskiej. Kolejną trudnością okazało się zdobycie zgody Alicji Alonso na udział w operze narodowego baletu kubańskiego. Mimo kategorycznej odmowy, zespół Alonso zatańczył w *Halce*. Inna przygoda, a bardziej przeżycie dotyczyło Yolandy Hernandez. Piękną, ciemnoskórą dziewczynę Maria wypatrzyła w chórze i wybrała na Halkę. Ona albo żadna! Dyrekcja nie chciała zaakceptować tego wyboru. Reżyser postanowiła, że odwoła premierę. Ambasador Renke podsunął pomysł, aby poprosić o rozwiązanie spornej kwestii Fidela Castro i umówił Marię Fołtyn na spotkanie. Czekala cały wieczór i pół nocy w ambasadzie, o trzeciej nad ranem rozmawiała z dyktatorem. Przekonała Fidela Castro do swojej koncepcji. Na pierwszy plan wysunął się konflikt nie tylko stanowy, ale i rasowy. Biały Janusz i czarna Halka, to właśnie przemawiało do tamtejszej publiczności. Problem został ostatecznie rozwiązany. Próby trwały po 10 godzin dziennie, bez klimatyzacji, w morderczym upale.

³⁵ Znane wówczas nazwiska to: Lucjan Kydryński, Janusz Ekiert, Henryk Swolkień i Ibis Wróblewski.

³⁶ W. Rudziński i Wacław Panek.

Odbyło się dwadzieścia przedstawień. Halka odnotowała ogromny sukces artystyczny³⁷. Przeprowadzano transmisje radiowe i telewizyjne. Czarnoskóra Yolanda ujmowała pięknym głosem. Przeciwwstawienie koloru skóry nadało fabule opery cechy prawdopodobieństwa. „...Romans panicza z czarną dziewczyną trąci dziewiętnastowieczną zaściankowością, stając się problemem o szerszych rozmiarach i większej miłości...”³⁸.

Ważną rolę w sukcesie przedstawienia odegrała scenografia Krzysztofa Pankiewicza. „Mottem” były ciekawie zaprojektowane dwie bramy. Jedna do dworu, barokowa, symbolizująca uwięzienie bohaterki w innym świecie i druga jako drzwi góralskiej kapliczki, na których Halka zawiesza chustę. Przed stylizowanym kościołkiem scenograf postawił Chrystusa Frasobliwego, arcydzieło sztuki ludowej. Krytyka wystawiła kubańskiej *Halce* bardzo wysoką notę, która czarnoskórej Yolandzie otworzyła drzwi do wielkiego świata. W niedługim czasie została zaproszona do studium wokalnego przy Konserwatorium Piotra Czajkowskiego w Moskwie.

16 października 1971 r. w Teatrze Garcia Lorki w Hawanie z zespołem Narodowej Opery Kubańskiej wystawiono *Halke* po hiszpańsku w reżyserii Marii Fołtyn. Tego dnia Maria kończyła karierę śpiewaczki, a stała się reżyserem³⁹. Dzięki spontaniczności artystów kubańskich, premiera *Halki* odbiła się szerokim echem w całej Ameryce Łacińskiej, a następnie w Europie.

Rok 1973 dla Marii Fołtyn to czas debiutu reżyserskiego w Polsce. Pojawiła się również propozycja realizacji *Halki* w Meksyku. Antoni Wicherek wybrał ją na reżysera w Teatrze Wielkim w Warszawie, gdyż twierdził, że każdą nutę odczuwa sercem i zmysłami. Dysponowała wówczas znakomitą obsadą: Andrzej Hiolski – Janusz, Bernard Ładysz – Stolnik, Bogdaan Paprocki – Jontek, Hanna Rumowska-Machnikowska – Halka i Barbara Nieman – Zofia. Józef Kański ocenił wtenczas *Halke*, jako wydarzenie artystyczne i spektakl wyjątkowej urody, imponujący przepychem i rozmachem, przewyższający wszystko, co dotąd oglądał na scenach Teatru Wielkiego. Spektakl romantyczny i wynikający z wnikliwego odczytania partytury i libretta. Docenił wartość drobnych i pełnych uroku realiów wywodzących się ze staropolskiej obyczajowości, a podkreślających narodowy charakter przedstawienia⁴⁰. Maria Fołtyn jeszcze wiele razy realizowała *Halke* w Polsce, m.in. w Bytomiu, Krakowie i Wrocławiu.

W 1974 r. Fołtyn znalazła się w Meksyku, aby wyreżyserować *Halke*, która zainaugurowała *Przegląd oper słowiańskich* w tym kraju. Premiera *Halki* w Mexico

³⁷ W 1949 r. Maria Fołtyn zaczynała karierę wokalną właśnie partią Halki w Operze Bałtyckiej. A teraz zaprezentowała się w roli reżysera Polskiej Opery Narodowej na Kubie.

³⁸ Fołtyn, M. (1997). *Żyłam sztuką...*, s. 133.

³⁹ Nieprzerwanie do 18 stycznia 2009 r. kiedy to odbyło się ostatnie przedstawienie *Halki* w reżyserii Marii Fołtyn w Teatrze Wielkim Operze Narodowej w Warszawie.

⁴⁰ Fołtyn, M. (1997). *Żyłam sztuką...*, s. 105.

City odniosła sukces. W tytułowej roli śpiewały Polka – Hanna Lisowska i Meksykanka – Rosario Andrade. Spektakl zaplanowano na 8 sierpnia 1974 roku. Polscy śpiewacy nauczyli się *Halki* po hiszpańsku. Dzięki Marii Fołtyn, jej talentowi i niezłomnej walce o sztukę, Stanisław Moniuszko zaczął zdobywać nieśmiertelność w Meksyku. Obsada: Halka – Hanna Lisowska, Jontek – Bogdan Paprocki, Zofia – Barbara Nieman, Stolnik – Leonard Andrzej Mróz, Janusz – Jan Czekay⁴¹. Druga obsada, meksykańska, bardzo ambitnie podjęła wyzwanie. W czasie uwertury, Meksykanie płakali, byli poruszeni muzyką Moniuszki. Dyrygował Kazimierz Kord. Przedstawienie okazało się sukcesem, z opery Moniuszki Maria Fołtyn zrobiła opowieść o indiańskiej góralce. Reżyser dostosowała utwór do meksykańskiej mentalności. Końcowy fragment przedstawiał się następująco: z gór, jak strzała dopada rywala Jontek, wrywa mu z rąk chustę ukochanej i z nienawiścią uderza Janusza ciupagą w serce. Widownia zamierała w tym momencie. Tuż przed śmiercią twórca libretta do *Halki* – W. Wolski, tak pisał do przyjaciół: „Gdy wspomnę o *Halce* płaczę i jeszcze raz płaczę. Jak to dziecko krwi mej duszy ukochałem nad wszystko”⁴².

Po wielkim sukcesie w Meksyku, Maria niespodziewanie dostała zaproszenie do Atlanty, następnie poleciała do Nowego Jorku. W tym samym roku wystawiła *Halke* w Devlet Opera w Ankarze z zespołem opery tureckiej. Rok 1979 przyniósł wspaniałe reżyserie *Strasznego Dworu* w Bukareszcie w języku rumuńskim oraz w Tokio w języku japońskim.

Przygotowania do wystawienia *Halki* w Turcji trwały wiele lat. W ramach wymiany kulturalnej między Polską a Turcją istniała możliwość wystawienia opery S. Moniuszki w Ankarze. Po długich i trudnych rozmowach obu Ministerstw Kultury, ówczesny dyrektor opery w Ankarze Ferriti Tuzun – znakomity dyrygent i kompozytor okazał się przychylny temu przedsięwzięciu. Niestety na dwa tygodnie przed przybyciem Marii Fołtyn do Turcji zmarł nagle na atak serca. Kierownictwo muzyczne tureckiej *Halki* powierzono dyrektorowi Teatru Wielkiego w Warszawie Antoniemu Wicherkowi, choreografię Witoldowi Grucy, scenografię Andrzejowi Majewskiemu, zaś reżyserię Marii Fołtyn. I znowu, reżyser musiała nauczyć artystów tureckich elementów polskiej kultury. Maria z W. Grucą wirowali, aby zaprezentować rytm polskich tańców narodowych – poloneza i mazura. Scenografia w założeniu miała zawierać elementy polskości. Premiera odbyła się zgodnie z planem 28 grudnia 1977 r. W partii Halki wystąpiła Yidiz Tumbul, a Jontka – Osman Gogoglu, który był niekwestionowaną gwiazdą wieczoru. Wyczuwało się zachwyt wokół polskiego kompozytora.

Dyrektor Wydziału Kultury w Istambule Hasaturiani Hayati, rok po wystawieniu *Halki* zaprosił warszawski Teatr Wielki na słynny istambulski festiwal. Moniuszko

⁴¹ Największy po Andrzeju Hiolskim baryton w Polsce, wokalista i aktor.

⁴² Państwowa Opera i Filharmonia w Warszawie. (1957). *Hrabina. Opera w trzech aktach* [Program przedstawienia]. s. 57.

zwyciężył, wywołując wielki entuzjazm. Dzięki temu „historyczny akt” połączenia kultury tureckiej i polskiej stał się faktem.

W 1980 roku Antoni Wicherek ponownie zaproponował M. Fołtyn reżyserię, ale tym razem *Parii*, opery należącej do dzieł mniej znanych, której premiera odbyła się w 1869 r. w Warszawie. Zostaje ona odkryta na nowo, za sprawą znakomitych solistów: Barbary Nieman, Jerzego Artysza, Jerzego Ostapiuka i Romana Węgrzyna. Po pięciu latach Maria Fołtyn zamówiła hiszpańskie tłumaczenie libretta i w 1989 roku A. Alonso zatwierdziła premierę *Parii* w Hawanie. Spektakl pojechał w świat, o czym marzył sam jej twórca. Fołtyn chciała spełnić marzenie Moniuszki o światowej premierze tej opery. W 1991 r.⁴³ odbyła się w Hawanie światowa prapremiera.

W 1984 r. Wacław Janas, ówczesny wiceminister kultury i sztuki zaproponował Marii wyjazd do Rosji w celu wystawienia *Halki*. Jedynym miejscem, gdzie można było zaprezentować polską operę narodową był Nowosybirsk, stolica Syberii. Natomiast Moskwa, Kijów i Wilno nie były zainteresowane taką inicjatywą. Poparcie naczelnego dyrygenta opery w Nowosybirsku, Izydora Żaka przyczyniło się do rozpoczęcia przygotowań premiery. Podczas prób największą trudność sprawiał mazur. Dyrygentem i kierownikiem muzycznym był Borys Gruzin. Halką była Tatiana Zorina, Jontka wykreował Walery Jegudin, w drugiej obsadzie Sasza Bierdiajew. Choreografa sprowadzono z Polski, był nim Conrad Drzewiecki. Przedstawienie zrealizowano na najwyższym poziomie. Halka przyciągnęła publiczność, która wypełniła teatr przygotowany na 2600 miejsc siedzących. Zainteresowała też szerokie grono krytyków. Próbom towarzyszyła ekipa telewizyjna. Na bieżąco komentowano postępy artystyczne. Na premierę przybyli ważni przedstawiciele świata muzyki i teatru. *Halkę* uznano za ognisty wybuch polskości na Syberii. W 1986 roku opera z Nowosybirska została pokazana w Warszawie.

W 1986 r. zespołowi Opery Śląskiej zaproponowano tournée po Ameryce. Na trasie artystycznej pierwsze było Toronto. Jan Wojewódka dążył do tego, aby udało mu się wypromować kulturę polską w Kanadzie i Stanach Zjednoczonych. Następnym przystankiem było Buffalo, sala teatralna przystosowana na 3500 miejsc siedzących. Następnymi, ważnymi etapami podróży było: Detroit, i Chicago⁴⁴.

W 1988 roku Opera Śląska ponownie wyjechała do Ameryki. Jan Milun prezes Towarzystwa Moniuszkowskiego w Bostonie, przygotowywał dziesięciolecie pontyfikatu Jana Pawła II w kościele Świętego Patryka w Nowym Jorku. Korzystając z okazji, iż Opera Śląska odbywała podróż od Puerto Rico przez Hawaje do Montrealu, poproszono panią Marię Fołtyn, aby zechciała zaśpiewać w ramach obchodów tego jubileuszu. Polscy artyści – rodacy papieża – wykonali Litanie Ostrobramskie S. Moniuszki. Do chóru dołączyli Amerykanie, spotęgowało

⁴³ Po 20 latach od premiery latynoamerykańskiej, w języku hiszpańskim.

⁴⁴ Auditorium Theater liczący 5000 miejsc.

to brzmienie zespołu. Zagrano ponadto uwerturę do *Halki*, którą dyrygował A. Wicherek.

W 1978 r. Maria Fołtyn obejmując kierownictwo Festiwalu Moniuszkowskiego w Kudowie Zdroju, mogła liczyć na współpracę Wiesława Ochmana i Bogusława Kaczyńskiego. Ideą było, aby Festiwal w Kudowie stał się wydarzeniem międzynarodowym. Już w 1979 r. udało się zrealizować te plany. W Koncercie Gwiazd wzięło udział 11 solistów. Reprezentowali oni takie kraje jak: Turcja, Japonia, Meksyk, Rumunia i Rosja. Podczas koncertu występowała czarnoskóra – Yolanda Hernandez, Meksykanka – Rosario Andrade, oraz z Turcji Osman Gogoglu – Jontek – i Idisz Tumbuł – Halka. Zrodził się pomysł, aby polskie arie i pieśni wykonali śpiewacy z innych krajów niż Polska. Wówczas Wiliam Oberholtzer i Norman Philips, którzy byli z pochodzenia Amerykanami, zabłysnęli wspaniałą polszczyzną. W ramach festiwalowych wydarzeń prezentowane były spektakle operowe: *Halka*, *Straszny dwór*, *Hrabina*, *Paria* i *Verbum Nobile*. Usłyszeć można było również: *Widma*, kantaty: *Milda*, *Nijola*, *Sonety Krymskie* i *Śpiewnik Domowy*. Rok 1982 przyniósł światowe prawykonanie wszystkich czterech *Litanii Ostrobramskich*. Okazały się one jednym z najpiękniejszych polskich dzieł muzyki religijnej. Kudowskim spotkaniom towarzyszyły także sesje popularnonaukowe. Organizatorem tych spotkań był W. Rudziński uchodzący za skarbnicę wiedzy o Stanisławie Moniuszce.

Ważnym wydarzeniem było zorganizowanie I Konkursu Śpiewaków Amatorów. W którym wystąpiła śpiewająca i muzykująca młodzież oraz dzieci. Do grona uczestników dołączyli także: lekarze, pedagodzy, robotnicy, naukowcy, którzy dopełnili szerokie grono uczestników. Wszystkich połączyła miłość do pieśni Moniuszki. Maria Fołtyn chcąc rozśpiewać naród, szukała różnych dróg propagowania tej idei. W 1980 roku zorganizowano *Moniuszkowskie Show* z udziałem Ireny Santor⁴⁵, Marka Grechuty⁴⁶ i Danuty Rinn⁴⁷. Występowali aktorzy: Krzysztof Kolberger, Daniel Olbrychski, Anna Nehrebecka i inni.

W 1985 roku na Festiwalu w Kudowie wystąpili: Emil Yurasku z Rumunii i Vincenzo Puma z mediolańskiej La Scali. W 1986 roku pojawili się: Akio Fuji Wara z Kuby, Ramon Cazadilla również z Kuby i Walery Jegudin z Syberii. Śpiewano w języku: rosyjskim, litewskim, tureckim, hiszpańskim, japońskim, niemieckim, rumuńskim i włoskim. Rozpisano ponadto konkurs *Moniuszko w plastyce*. Podczas XXV Festiwalu zaprezentowano ponownie Litanie Ostrobramskie w interpretacji Stefana Stuligrosza i jego chłopięcych Słowików, której nagranie zadedykowano Ojcu Świętemu Janowi Pawłowi II. Na XXX Festiwalu, w pięknej bazylice Wambierzyckiej wykonano *Requiem* G. Verdiego.

Towarzystwo Miłośników Muzyki Moniuszki Powstało z inicjatywy Marii Fołtyn w roku 1988. Od roku 1997 Towarzystwo ma siedzibę w gmach Teatru

⁴⁵ Wykonała *Prząśniczkę*, pieśń do słów J. Czeczota i muzyki S. Moniuszki.

⁴⁶ Wykonał *Czaty*, *balladę* do słów A. Mickiewicza i muzyki S. Moniuszki.

⁴⁷ Wykreowała satyryczną interpretację arii Halki.

Wielkiej Opery Narodowej. 11 kwietnia 2007 roku, wznowiło swoją działalność przez uzyskanie wpisu do Krajowego Rejestru Sądowego.

„Ponieważ wyrastałam w przekonaniu o nadrzędnej roli kultury w krzewieniu polskości i przetrwaniu narodu, a więc kto mógłby być mi, jako śpiewaczce i Polce oddanej swojej ojczyźnie, bliższy niż twórca oper do głębi polskich, przepełnionych patriotyzmem?”⁴⁸.

Towarzystwo zostało powołane głównie dla realizacji Konkursu Wokalnego im. Stanisława Moniuszki, by instytucjonalny charakter Towarzystwa ułatwił realizację tego międzynarodowego przedsięwzięcia.

„Szukałam wielu różnych form, które mogłyby przyczynić się do promocji twórczości Moniuszki. Stąd zrodził się pomysł powołania Towarzystwa Miłośników Muzyki Moniuszki przy udziale grupy entuzjastów, którym zależało na realizacji idei popularyzacji muzyki kompozytora, na czele z nieżyjącym już Witoldem Rudzińskim⁴⁹.

Towarzystwo Miłośników Muzyki Moniuszki zorganizowało, m.in. przy współpracy Duszpasterstwa Środowisk Twórczych Archidiecezji Warszawskiej uroczystości upamiętniające rocznice urodzin i śmierci kompozytora; stworzyło wystawę poświęconą Moniuszce, która była prezentowana w wielu miastach Polski oraz w Montrealu. Główną ideą Towarzystwa jest promowanie twórczości Moniuszki na świecie, jak również wśród młodych ludzi, którzy nie mają możliwości poznania muzyki kompozytora. Jest on prawie zupełnie zapomniany przez autorów podręczników i wydawców audycji telewizyjnych. „...Mam kolejne pomysły i nadzieje związane z promowaniem twórczości Moniuszki i jeśli los pozwoli, będę je realizować...”⁵⁰

Towarzystwo Miłośników Muzyki Moniuszki opiekuje się także pomnikami i pamiątkami związanymi z naszym narodowym artystą. Jedyne Muzeum Moniuszkowskie utworzone staraniem Towarzystwa, z panią prezes Marią Fołtyn na czele, znajduje się w Ubielu na Białorusi, rodzinnej wsi kompozytora, leżącej ok. 40 km od Mińska. Uroczyste otwarcie nastąpiło w 150. rocznicę urodzin Moniuszki, 5 maja 1969 roku z udziałem delegacji Polskiej, pod przewodnictwem ówczesnego prezesa Związku Kompozytorów Polskich prof. Stefana Śledzińskiego. Osiągnięciem Towarzystwa Miłośników Muzyki Moniuszki i biura Konkursu jest zorganizowanie w dniach 30 i 31 maja 2001 roku koncertów muzyki polskiej w Pekinie. Współorganizatorem koncertów była Ambasada Rzeczypospolitej Polskiej w Pekinie, na czele z ambasadorem Xawerym Burskim, oraz Ministerstwo Spraw Zagranicznych. Wzięli w nich udział polscy wokaliści – Aleksandra Kurzak i Dariusz Stachura oraz chińska śpiewaczka Sun Yuanyuan. Towarzystwo, pielęgnuje również rocznice związane postacią swojej założycielki. W 2022 r. Mszą Świętą i koncertem w Kościele Duszpasterstwa Środowisk Twórczych Archidiecezji

⁴⁸ Bączkowski, E. (2009). *Wywiad z...*

⁴⁹ Profesor Akademii Muzycznej w Warszawie, kompozytor, publicysta i pedagog.

⁵⁰ Bączkowski, E. (2009). *Wywiad z...*

Warszawskiej została uczczona 10. rocznica śmierci artystki⁵¹. W 2024 r. obchodzona była 100. rocznica urodzin wybitnej śpiewaczki, reżyser i animatorki życia muzycznego.

Maria Fołtyn propagatorka muzyki S. Moniuszki, którego znawcy sztuki nazywają Ojcem Polskiej Opery Narodowej, zadbała także o młodych adeptów sztuki wokalne. Zgodnie z początkowymi założeniami, TMMM dało podwalinę dla formalnej organizacji Międzynarodowego Konkursu Wokalnego imienia S. Moniuszki, wspartego przez Ministerstwo Kultury i Sztuki. W roku 1992 Maria Fołtyn zainicjowała I Międzynarodowy Konkurs Wokalny im. Stanisława Moniuszki. Uczestnicy Konkursu to najlepsi z najlepszych ambasadorów Polskiej Kultury Narodowej. To właśnie oni zabierają naszą muzykę i kawałek Polski do swoich krajów, a włączając ją w swój repertuar na sceny całego świata. Twórczość Moniuszki silnie związana z tradycją naszego kraju jest, według Marii Fołtyn, z jednej strony arcy-polska, a z drugiej niezwykle uniwersalna, poprzez swą prostotę i silną uczuciowość.

Konkurs⁵² jest organizowany co trzy lata, I edycja Konkursu dla Młodych Wokalistów im. Stanisława Moniuszki odbyła się w Filharmonii Narodowej w Warszawie, w czerwcu 1992 r., pod patronatem Ministra Kultury i Sztuki, prof. dr hab. Andrzeja Sicińskiego. W konkursowych szrankach stanęło ponad 250 uczestników, z czego zakwalifikowało się 106 z 20 krajów świata, w tym 40 Polaków. Z każdą następną edycją konkurs zyskiwał coraz większy prestiż i obecnie jest jednym z ważniejszych wydarzeń, w którym biorą udział wokaliści z całego świata. Jest także, największym konkursem wokalnym w Polsce i bezcennym dziełem swojej pomysłodawczyni. Maria Fołtyn był dyrektorem konkursu przez 7 edycji. Jej następczynią od 2013 r. jest Beata Klatka. Międzynarodowe jury przyznaje cztery główne nagrody, a ponadto: Nagrodę im. Marii Fołtyn, Nagrodę Publiczności, Nagrodę Filharmonii Łódzkiej im. Artura Rubinsteina, Nagrodę im. Jana i Edwarda Reszke, Nagrodę Stowarzyszenia im. Ludwiga van Beethovena, Nagrodę im. Jerzego Marchwińskiego, Nagrodę im. Ewy Podleś oraz liczne nagrody pozaregulaminowe.

2 grudnia 2012 r. w Warszawie, w wieku 88 lat przeszła do historii Maria Fołtyn. Uroczystości pogrzebowe miały wymiar pożegnania godnego najwybitniejszych artystów. W dolnym foyer Teatru Wielkiego Opery Narodowej wystawiono trumnę z ciałem artystki, chór wykonał *Dobranoc* Stanisława Moniuszki. Z listu Ministra

⁵¹ Wystąpili: Wanda Bargielowska-Bargeyło-mezzosopran, Anna Kutkowska-Kass-sopran koloraturowy, Małgorzata Kneć-Ajdukiewicz-sopran, Michał Skiepmo-tenor, Witold Żołądkiewicz-baryton, Emanuel Bączkowski-organy.

⁵² Konkurs jest wyjątkową szansą promocji polskiej literatury wokalne w świecie. Od 2010 r. repertuar konkursu poza dogłębnym studium twórczości swojego patrona, pozwala także na przybliżenie kompozycji Fryderyka Chopina; od 2013 r. rozszerzony zostaje o twórczość: Karola Szymanowskiego, Mieczysława Karłowicza, Ignacego Jana Paderewskiego, Krzysztofa Pendereckiego i innych.

Kultury Bogdana Zdrojewskiego zapamiętałem, że do historii przejdą jej niepowtarzalne interpretacje moniuszkowskich arii, które wykonywała na scenach całego świata. Po uroczystej Mszy św. sprawowanej w Kościele św. Karola Boromeusza, spoczęła na warszawskich Starych Powązkach w pobliżu grobowca Stanisława Moniuszki.

W powojennej Polsce nie było większej od Marii Fołtyn propagatorki twórczości Narodowej Stanisława Moniuszki. Jej fenomen polegał na bezwarunkowym dążeniu do wyznaczonego celu. Talent i ciężka praca połączona z urokiem osobistym, kulturą bycia i determinacją wyniosły radomską artystkę na wyżyny. Razem z nią został zaprezentowany światu, skromny Pan Moniuszko. Z pewnością, nie spodziewałby się takiego rozgłosu i popularności. Niezależnie od bariery językowej, odmiennej mentalności i zwyczajów, Maria Fołtyn potrafiła przekonać do kompozycji Moniuszki obcokrajowców. Jej reżyseria, mistrzowsko „dopasowana” do kraju w którym przygotowywała przedstawienie, budziła zachwyt i podziw. Promocja Stanisława Moniuszki okazała się jej celem życia i przyniosła zasłużony sukces. Sama Maria Fołtyn zapytana, dlaczego zajmuje się Moniuszką, odpowiedziała: „Robię to z wewnętrznej konieczności, aby obronić się przed znieczuleniem na los innych, odciąć się od bezduszości i głupoty. Odbylałam wiele podróży do najdalszych zakątków świata, spotykałam interesujących ludzi, odmienną kulturę, uczułam w sobie żar tworzenia i wielką artystyczną potencję. W osiemdziesiątym piątym roku życia jestem rześka i twórcza, choć od wielu lat mam dolegliwości zdrowotne. Nie poddaję się im. Gdy podejmuję kolejne artystyczne wyzwania – zapominam o chorych kolanach. Pracuję, żyję, dziękując Bogu za to, że dał mi siły do walki z przeciwnościami”⁵³.

Do osiągnięcia zamierzonego celu niezbędne jest bezwarunkowe poświęcenie się dla idei. Stanisław Moniuszko sporządził rękopisy swych kompozycji, ale tylko część z nich wydrukował. Pozostałe wydali miłośnicy jego muzyki. Zapoznając Europę ze swoją twórczością, dał się sam poznać jako wybitny kompozytor. Jako organista, pianista-akompaniator i dyrygent, pokazał następnym pokoleniom muzyków właściwą w jego rozumieniu i odczuciu interpretację swej muzyki. Niewątpliwie Fryderyk Chopin był wielkim pianistą i genialnym kompozytorem. Moniuszko natomiast był wielkim twórcą oper narodowych i form wokально-instrumentalnych.

Niekwestionowaną rolę, w dążeniu do ustalenia i zdefiniowania oceny wielkości naszego twórcy narodowego, odegrała niestrudzona maestra Maria Fołtyn. Na początku, poprzez wspaniałe kreacje Halki w kraju i za granicą, następnie jako reżyser *Halki* i *Strasznego Dworu* w teatrach na świecie, a w końcu, jako pomysłodawca i dyrektor Międzynarodowego Konkursu Wokalnego im. Stanisława Moniuszki. Otrzymała wiele odznaczeń państwowych i resortowych m.in. Krzyż Komandorski z Gwiazdą Orderu Odrodzenia Polski. Ponadto: doktorat honoris causa

⁵³ Bączkowski, E. (2009). *Wywiad z...*

Akademii Muzycznej im. Karola Lipińskiego we Wrocławiu, tytuł honorowego obywatela Miasta Radomia. Sala Kameralna Zespołu Szkół Muzycznych im. Oskara Kolberga w Radomiu nosi jej imię. Przed budynkiem tejże szkoły, spogląda na uczniów utrwalona w spiżowym pomniku, zapamiętana w roli Halki. Również jedna z ulic Radomia jest jej dedykowana.

Kazimierz Wiłkomirski powiedział: „Bez przesady stwierdzić można, że nie tylko żaden z najwybitniejszych artystów polskich, ale i wszyscy razem nie zdołali uczynić tyle dla ugruntowania sławy twórcy polskiej opery narodowej⁵⁴ poza granicami jego ojczyzny, co Maria Fołtyn”⁵⁵.

Jakie będą dalsze losy polskiej kultury w znacznej mierze, zależy od nas samych.

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⁵⁴ *Halka* była wystawiana w: Pradze, Nowojorskiej Crnegie Hall, Buffalo, Chicago, Detroit, Hertford, Lille, Hawanie, USA i Kanadzie, Toronto, Chicago, Lyonie, Osace w Japonii, Londynie, Ankarze, Nowosybirsku, Finlandii, Lizbonie, Brukseli, Wiedniu.

⁵⁵ Państwowa Opera i Filharmonia w Warszawie. (1957). *Hrabina. Opera w trzech aktach* [Program przedstawienia]. s. 45.

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