

# A c t a Universitatis Lodzianis

**FOLIA SOCIOLOGICA**

88  
2024

**Stosunki społeczne. Tożsamość.  
Miejsce. Komunikacja**

pod redakcją  
**Marcina Kotrasa**



**WYDAWNICTWO  
UNIwersYTETU  
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## SINGLE PEOPLE IN POLAND AND BRAZIL ON SOCIAL ISOLATION: LIVING SITUATIONS

**Abstract.** This text is a report related to the quantitative data of the study “Single people in social isolation: a transnational study”. This research started in 2020 and aims to understand, from a gender perspective, how single people from Brazil and Poland experienced social isolation due to the COVID-19 pandemic. The research included single adults of both sexes who were not involved in a romantic relationship at that time. The study is exploratory, with quantitative methods, using questionnaires as instruments. In this text, we are going to present the profile of the participants in the Brazilian and Polish samples, seeking to describe from a gender and an intersectional perspective how single people lived in the first months of 2020 when the pandemic was recognised by some essential socio-demographic characteristics, living conditions, parenting, casual relationships.

**Keywords:** pandemic of COVID-19, single people, living solo, singlehood, singles, gender

## SINGLE W POLSCE I BRAZYLII W IZOLACJI SPOŁECZNEJ: SYTUACJE ŻYCIOWE

**Abstrakt.** Artykuł bazuje na danych ilościowych z badania „Osoby samotne w izolacji społecznej: badanie międzynarodowe”. Badanie to rozpoczęło się w 2020 r. i miało na celu zrozumienie, z perspektywy płci, w jaki sposób osoby samotne z Brazylii i Polski doświadczyły izolacji społecznej z powodu pandemii COVID-19. W badaniu wzięły udział samotne osoby dorosłe obu płci, które w tym czasie nie były zaangażowane w romantyczny związek. Badanie ma charakter eksploracyjny, z metodami ilościowymi, z wykorzystaniem kwestionariuszy ankiet jako narzędzi. W tym tekście zamierzamy przedstawić profil uczestników w próbie brazylijskiej i polskiej, starając się opisać z perspektywy płci i interseksyjnej, jak żyły osoby samotne w pierwszych miesiącach

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2020 r., kiedy pandemia została rozpoznana z uwzględnieniem podstawowych cech statusowych i społeczno-demograficznych, warunków życia, rodzicielstwa i przypadkowych relacji.

**Słowa kluczowe:** pandemia COVID-19, osoby samotne, życie w pojedynkę, singielstwo, single, płęć, gender

## 1. Introduction

When COVID-19 broke out in China in December 2019, several countries adopted social isolation to prevent contamination and contain the virus under the guidance of the World Health Organization – WHO. This measure was also taken to avoid overburdening the healthcare system, especially public health worldwide. The adoption of social isolation, however, tends to change people's life dynamics, routines, forms of relationships, and self-care. On the one hand, staying at home and being socially isolated is a form of protection against contamination by the virus; on the other hand, it can be one of the stress factors identified in health crises (Morales 2020).

According to the census of the IBGE (Brazilian Institute of Geography and Statistics), in 2010, in Brazil, the number of single people was 55.3% of the population (added to the number of separated, divorced and widowed people, the percentage reaches 65.1%) (IBGE 2010). In the last census of the same institution, the number of single people was higher than marriage: 81 million singles (without the number of divorced, separated and widowed) and 63 million married people (IBGE 2022). 15.5% is the percentage of single-person households, higher than in 2012, which was 12.2%. With the increasing number of divorces and the diversity of households, single people are gaining prominence in the country.

The latest population census conducted in Poland in 2021 shows that the number of single-person households has increased by just over 2 percentage points compared to the census in 2011. In 2011, single-person households accounted for 20.3%, now 22.7%. The most significant difference concerns large cities, where the change is almost 4%, and currently, nearly 1 in 3 apartments is inhabited by a single person. There is also a higher number of divorced individuals than in 2011 – back then, it was 5%, and now it is 7.6%. Hence, it can be stated that there are half as many again divorced Poles today as there were a decade ago. As for bachelors and spinsters, they constitute 30% of society today, and there has been little change in this regard over the last 10 years (Central Statistical Office in Poland 2011, 2023).

In several countries, demographic data have shown that there is a growing trend in the number of single people since the 1970s, considering it a reflection of the social transformations in the field of intimacy that have been happening rapidly in Western societies – such as the increasing number of divorces and separations, the increase in age expected to marry, or even the non-marriage, which leads people to spend more time single. Amid these transformations, we live with the emergence

of a more diverse composition of households beyond the nuclear family, including people living alone, sharing a residence with colleagues and friends, single-parent families, and others.

The topic of singlehood has drawn attention from various fields of knowledge. From a gender perspective (Haraway 1995; Harding 1996), singlehood is seen as a social, historical, cultural and discursive construction, as well as a social practice, according to Jill Reynolds (2008). In dialogue with this perspective and also from an intersectional look, we understand that singlehood is multidimensional and multifaceted. Considered as a condition or situation of those who are single, and based on a study that analysed the experiences and meanings of adult single people living alone, it was seen from the following dimensions: marital status, lifestyle, loneliness and freedom (Andrade 2022).

The dimensions established from Andrade's study were: (a) as "marital status", including the construction of this concept in opposition to marriage and discussing expectations and criticism of this institution, as well as considering singlehood as a temporary state ("being" single); (b) as "lifestyle" – "to be single", adopted by those who construct their lifestyle under this condition; (c) as "loneliness", discussed as a feeling that does not depend on marital status and type of residence, but is inherent to the human condition and can be experienced positively, approaching solitude (Mansur 2011); finally, (d) as "freedom", considered the primary dimension of singlehood, an element that interconnects the other dimensions and its most essential meaning. (Andrade 2022: 46–47 *free translation*)

These dimensions dialogue with other studies on the area (Stein 1976, 1981; DePaulo 2016, 2017, 2023; Paprzycka 2008; Żurek 2008; Czernecka 2014). Singlehood is multifaceted in the sense that its experience is related to the discourse and social places that people occupy, also varying in time, culture and locality, being dynamic because it may not be a condition experienced as permanent due to the possibility of marriage – especially for those who long for one.

Studies supporting the topic have been based on an interdisciplinary and gender perspective (Haraway 1995; Harding 1992), looking at the heteronorms (Wittig 1992) that are still very present in Western culture, characterised as patriarchal, familistic, and couple-oriented (Budgeon 2008; Amador, Kiersky 2003). They also observe how these cultural norms influence the experiences and subjectivities of single adults, placing them in a paradoxical situation in contemporary times, where new ways of living, relating, and building identities coexist with some traditions. Choosing a way of life outside marriage has been more socially accepted. The stigmas of the "spinster" and the "bachelor" weaken; single adults are still asked to be expected to respond about the reasons why they are not married. This requires the creation of strategies to deal with such accusations (Budgeon 2008; Reynolds, Wetherell 2003).

Single people in this context may also feel excluded, as if there is something wrong with them, which contributes to the emergence of negative feelings about



self-identity and self-esteem and can lead to psychological distress. This is especially true for women, whose identities are constructed in our culture with a focus on the relationship with the other, from the so-called gendered devices, as Valeska Zanillo (2018) discusses. For the author, there are privileged paths of subjectivation for women and men. Women subjectivate themselves from the loving and maternal devices, which are related to the social attribution of care – and to “feminine” characteristics, as being the function and destiny of women. Furthermore, men, through the efficacy device (sexual and labour efficacy), related to the social roles of provider and “eater”. In this sense, it is identitarian for women to be mothers and wives and for men to perform well sexually and labour life.

The gender device also works intersectionally with colour/race, sexual orientation/sexuality, age/generation, and other social identity attributes that place single people in places of vulnerability and, at the same time, underlie their identity constructions (Pacheco 2013). In the Brazilian context, we highlight how racism contributes to the loneliness of black women as well as in many other countries, especially ones marked by the colonisation process (Andrade 2012, 2022). The etarism still stigmatises, beyond the elderly, those people who have reached an “age to marry” but who are (still) single or have become divorced/separated; LGBTphobia still oppresses many people who want to express their sexuality and gender identity, for not being hegemonic (cisheterosexual, monogamic, etc.), and end up being limited to guetos as a form of protection, and even increase loneliness. Other discriminations can accentuate vulnerabilities related to singlehood, such as the experience of motherhood when one is a single mother or father and of non-motherhood – especially women who have chosen or for various reasons are not mothers, and even more so those who have interrupted a pregnancy.

During the pandemic, when we could see inequalities becoming more accentuated and the invisibility of social groups being exacerbated, we seek to draw attention to this social group of single people, considering this scenario. It is about knowing how they lived through the first months of 2020 when the questionnaires were applied. At that time, there were still measures of social isolation (in some way) in Brazil and Poland, and people started to create means to deal with the country’s crisis.

## **2. Methodology**

This study sought to know and understand how single people experienced a period of social isolation due to the pandemic of COVID-19, investigating aspects of personal life, work, leisure, and domestic activities; exercise of sexuality, including virtual relationships; mental health – feelings present in the period of social isolation and self-care practices; opinions and experiences of singlehood; and projects for the future. It considered gender and cultural differences regarding the mentioned

aspects. Also, it sought to analyse processes of subjectivation around the experience of singlehood in the pandemic in order to investigate how the people who participate in the study feel in the condition of singlehood, observing the injunctions of gender devices in an intersectional way, paying attention to their places of speech and the contexts from which they depart.

The study was exploratory and used online questionnaires and interviews to construct data. In this paper, we will focus on the data from the online questionnaire containing 64 questions, closed and open, applied from the access to people through “snowball”, accessed through the contact network of the research team and disseminated on social networks. For data analysis, we used content analysis (Bardin 1997), observing the themes of the study, gender and cultural differences, with support from SPSS (Statistical Package for the Social Science) software for computing and statistical analysis of a more descriptive nature of the responses from the questionnaires. We applied the questionnaires between April and August 2020, when social isolation measures were being adopted globally. In Brazil, however, this measure was not adopted in a more organised way due to the lack of a coherent national policy to combat the virus. In Poland, surveys were distributed by the singles portal *Sympatia.pl* and made available on the Association for Singles website. In this phase, we had 1645 valid questionnaires, 867 of which were applied in Brazil and 778 in Poland. It should be added that in Poland and Brazil, much larger results of questionnaire completions were obtained (in Poland, about 3,000, in Brazil, nearly 1,500). At the same time, due to a lot of missing data, the analysis was narrowed down to complete questionnaires. The high interest in the survey may indicate this topic’s social relevance and importance.

The sample in this study was random and not probabilistic. The intention was that these data could collaborate to help us think about the condition of single people during the pandemic, starting from a specific middle-class group, considering that they were people who had access to the internet and that most of them had working conditions that allowed them to stay at home. The analyses considered the variables sex (women and men), race (people who declared themselves white and black, and other races – we added black, brown, and other races), age (we separated 4 age groups: 18 to 25 years, 26 to 41 years, 42 to 59 years, and 60 years or older), type of residence (those who lived alone and those who shared a residence), and maternity/paternity (people with children and those without) due to investigate the similarities and differences between some of the characteristics of this group. The analyses considered the frequencies of responses between each group, not comparing them. In this process, we used the chi-square test to observe statistical significance. The researchers also undertook the second part of the qualitative study, which involved conducting in-depth, structured, open-ended interviews with women and men, which will be analysed in future articles.

### 3. Data about personal life: Profile of the sample

Regarding sex, gender identity and sexual orientation, the majority of the participants in Brazil are single women (80.7% women; 19.3% men), cisgender persons (96.4% in total. 97.1% of women and 94% of men responses), with heterosexual sexual orientation (70.8%). The sexual orientation of the others added up to 29.2%, which included those who identified themselves as bisexual (15.8%), gay (7.5%), lesbian (3.7%), pansexual (1.7%), and others. As in Brazil, most of them identified themselves as a cisgender person: 98.0% of women, 96.4% of men's responses. The majority declared heterosexual: 93.5% of women and 95.2% of men. Other sexual orientations cited were: among women, 2.9% claimed bisexual, 1.8% described their sexual orientation as different, 0.9% asexual, and 0.9% pansexual. Among men, 1.8% declared themselves as bisexual, 1.2% as pansexual, 0.9% as asexual, and 0.6% as sexual orientation as different.

In Poland, the number of female and male participants was slightly more balanced: women (57.4%) and men (42.5%). Among Polish respondents, 98.0% of women identified with their birth gender and 2.0% identified with another cultural gender. Among men, 96.4% identified with their birth gender, 0.3% as transgender, and 3.3% identified their cultural gender as other. Among women surveyed from Poland, 93.5% declared themselves as heterosexual, 2.9% as bisexual, 0.9% as asexual, 0.9% as pansexual, and 1.8% described their sexual orientation as other. Among men, 95.2% described themselves as heterosexual, 1.8% as bisexual, 1.2% as pansexual, 0.3% as homosexual, 0.9% asexual, and 0.6% described their sexual orientation as other.

The age of the participants, in general, was divided into four groups for analysis, with the majority between 26 and 41 years old in Brazil: from 18 to 25 years old, 27.7% of the sample; from 26 to 41 years old, 49.6%; 20.4% of the sample in the 42 to 59 age group, and 2.3% with 60 years old or more. In the study group from Poland, there were 39 people in the 18–25 age group (5%), 424 people in the 26–41 age group (54.4%), 310 people in the 42–59 age group (39.8%) and 5 people in the age group 60 and more (0.6%).

Regarding marital status, in Brazil and Poland, the majority reported being single and never married, as shown in the table below, with more single people who had never married in Brazil and more divorced people in Poland.

**Table 1.** Gender and marital status

Country	Gender	Marital status (%)				
		Single (never married)	Divorced	Separated	Widow	Other
1	2	3	4	5	6	7
Brazil	Women	72.6	14.7	11.6	1.1	0.0
	Men	84.4	7.8	6.0	1.8	0.0

	1	2	3	4	5	6	7
Poland		Women	52.8	34.7	4.5	6.0	2.0
		Men	69.5	25.4	3.0	1.2	0.9

Regarding gender and marital status in Brazil, 72.6% of the women stated that they were single and had never married, 14.7% were divorced, 11.6% were separated, and 1.1% were widowed. 84.4% of the men stated they were single and had never married, 7.8% were divorced, 6.0% were separated, and 1.8% were widowed. In this group, there are significant positive and weak relationships between sex and marital status  $\chi^2(3) = 11.83$ ;  $p = 0.008$ .  $\Phi = 0.12$ ;  $p = 0.008$ .

In the group of women from Poland, 52.8% were unmarried, 34.7% were divorced, 4.5% were separated, 6.0% were widows, and 2.0% answered that their marital status was different. In the group of men, 69.5% answered that they were single, 25.4% were divorced, 3.0% were separated, and 1.2% were widowers. In this group, there are significant positive and weak relationships between sex and marital status  $\chi^2(4) = 27.89$ ;  $p < 0.001$ .  $\Phi = 0.19$ ;  $p < 0.001$ .

Regarding age, more singles never got married in both countries, especially at an earlier age, and divorced over 40, as the table above shows.

**Table 2.** Age versus marital status

Country	Age group	Marital status (%)				
		Single (never married)	Divorced	Separated	Widow	Other
Brazil	18–25	98.3	0.8	0.8	0.0	0.0
	26–41	78.6	10.0	11.4	0.0	0.0
	42–59	39.5	34.5	20.9	5.1	0.0
	60 and more	25.0	50.0	15.0	10.0	0.0
Poland	18–25	94.9	0.0	0.0	0.0	5.1
	26–41	79.2	16.7	2.4	0.5	1.2
	42–59	30.0	53.9	6.5	8.4	1.3
	60 and more	0.0	20.0	0.0	60.0	20.0

In Brazil, in the 18–25 age group, most people never got married (98.3%); in the 26–41 age group, 78.6% of people too, followed by 11.4% as separated, and 10.0% as divorced. In the 42–59 age group, 39.5% indicated they were single and had never married, 34.5% were divorced, 20.9% were separated, and 5.1% were widowed. In the 60 and older age group, the majority are divorced: 50% divorced, 25% never married, 15% separated, and 10% widowed. This group has significant relationships between age and marital status  $\chi^2(9) = 246.53$ ;  $p < 0.001$ .  $\Phi = 0.53$ ;  $p < 0.001$ . In the study group of people from Poland aged 18–25, 94.9% declared that they were never married, and 5.1% stated that their marital status differed. In

the 26–41 age group, 79.2% of people declared that they were never married, 16.7% were divorced, 2.4% were separated, 0.5% were widows, and 1.2% determined their marital status was different. In the 42–59 age group, 30.0% declared that they were single and never got married, 53.9% were divorced, 6.5% were separated, 8.4% were widows, and 1.3% declared that their marital status is different. In the age group of 60 and older, 20.0% declared that they were divorced, 60.0% were widow, and 20.0% declared that their marital status differed. This group has significant relationships between age and marital status  $\chi^2(12) = 270.43$ ;  $p < 0.001$ .  $\Phi = 0.59$ . Interestingly, there is a more significant relationship between marital status with gender and age. There are more single men who have never married than women and younger groups, which also represents changes in the age of marriage. In Brazil, it was identified as 28 years for women and 31 years for men, according to the marriages registered in 2020 (IBGE 2020). Furthermore, the increase in divorce and separation rates also contributed to people spending more time as single.

#### 4. (Casual) relationships

We consider that single people are not necessarily celibate because they can be involved in different kinds of relationships outside marriage, as many other kinds of relationships are becoming more common: the ones that are more fluid and temporary. In this research, we did not include people involved in a severe or long-term romantic relationship to avoid the so-called living apart together people or other relationships that are closer to marriage. During the pandemic, with the decreased possibilities for sexual and amorous encounters due to social isolation measurement and the risk of contamination by the virus, it was expected that single people would not get involved in casual or other kinds of sexual and romantic relationships. Moreover, most of the participants of this research were not, around 70% in each country. The other part of the sample said they were involved in casual relationships. The Brazilians had more casual encounters (what is called “ficar”), and in Poland, the “friends with benefits” and being a lover/mistress were more present. We expected to find more people engaged in online dating in both countries, but it represented less than 10% of the responses. Check the table below.

In the female group from Brazil, 69.4% answered that they were not involved in any form of relationship, 15.9% had occasional sexual relations (what in Brazil calls “ficante”), 6.7% had a relationship with a “friend with benefits” (a friend with who occasionally the person have sex with), 6.0% of this group arrange online dating, 1.7% had a lover, 0.3% state that their form of relationship was different. Among men, 74.3% state that they were not involved in any form of relationship, 12.6% had occasional sexual relations (“ficante”), 6.0% had online dating, 5.4% answered that they had a “friend with benefits”, 1.8% had a lover. In this group, there is no significant relationship between sex and the form of relationship  $\chi^2(5) = 2.25$ ;  $p = 0.814$ .

**Table 3.** Gender and the form of the relationship

Country	Gender	Are you currently involved in any form of relationship? (%)				
		Yes, I have casual sexual relations (“ficar”)	Yes, I have a friend with whom I have sex from time to time	Online dating	Yes, a mistress/lover	Other
Brazil	Women	15.9	6.7	6.0	1.7	0.3
	Men	12.6	5.4	6.0	1.8	0.0
Poland	Women	1.8	8.3	7.8	4.5	2.5
	Men	3.3	8.5	7.3	2.4	2.1

In the group of people from Poland demonstrated in the environment of women, 75.2% of them answered that they were not involved in any form of relationship, 4.5% responded that they had a lover, 1.8% said that they had random sexual relations, 8.3% declare that they had “friend with benefits”), 7.8% manifest that they had online dating, 2.5% described their form of relationship as different. Among men from the same country, 76.4% answered that they were not involved in any form of relationship, 2.4% declared that they had a lover, 3.3% said that they had random sexual relations, 8.5% said that they had “friend with benefit”, 7.3% manifest that they go on online dating, and 2.1% responded that their form of relationship is different. In this group, there is no significant relationship between sex and the form of relationship  $\chi^2(5) = 4.30; p = 0.507$ .

Related to age and forms of relationships, in the group of respondents from Brazil aged 18–25, 71.7% declared that they are not in any form of relationship, 15.0% declared that they had random sexual relations, 7.1% said they had online dating, 5.4% said they had a “friend with benefits”, 0.8% declared that they have a lover. In the age range of 26–41, 65.8% answered that they were not in any form of relationship, 17.9% responded that they had random sexual relations, 7.4% answered that they had a “friend with benefits, 6.5% answered that they date online, 1.9% answered that they had a lover, 0.5% answered that their form of relationship was different. In the age range of 42–59, 76.8% stated that they were not in any form of relationship, 10.2% said that they had random sexual relations, 6.2% said that they had a “friend with benefits”, 4.0% said they had online dating, 2.8% said that they had a lover. In the age range of 60 and over, 95.0% manifest that they were not in any form of relationship, and 5.0% manifest that they had random sexual relations. In this group, there are no significant relationships between age and the form of relationship  $\chi^2(15) = 20.70; p = 0.147$ .

In the group of respondents from Poland aged 18–25, 79.5% declared that they had no relationship in any form, 7.7% said that they had a lover, 5.1% declared that they had a “friend with benefits”, 5.1% declared that they had online dating, 2.6% declared that they had random sexual relations. In the age range of 26–41, 77.1%

answered that they had no relationship in any form, 7.8% answered that they had an online date, 7.1% answered that they had a “friend with benefits”, 2.8% answered that they had a lover, 2.6% answered that they had random sexual relations, 2.6% answered that their form of relationship was different. In the 42–59 age group, 73.5% stated that they were not in any form of relationship, 10.3% said that they had a “friend with benefits”, 7.7% said they were dating online, 4.2% said that they had a lover, 2.3% said that they had random sexual relations, and 1.9% said their relationship was different. In the age range of 60 and over, 60.0% manifest that they were not involved in any form of relationship, and 20.0% had a friend with whom they have sex from time to time. There are no significant relationships in this group between age and the form of the relationship  $\chi^2(15) = 16.03$ ;  $p = 0.380$ . Related to sexual orientation and type of relationship, we did not find a significant relationship between sex and sexual orientation related to this item.

## 5. Parenting

Regarding being a **parent** during the pandemic, in both countries, most single people in this survey had no children; among them, more men than women did not.

**Table 4.** Gender vs. how many children you have

Country	Gender	Number of children (%)			
		None	One	Two	Three or more
Brazil	Women	76,6	11,9	8,3	3,3
	Men	90,4	6,6	2,4	0,6
Poland	Women	58,4	19,2	16,1	6,3
	Men	62,8	18,7	14,2	4,2

When we observe the groups by sex, more men do not have children than women in Brazil: 90.6% of men do not have children, and 76.6% of women do not have children either. Among the sexual orientation groups (hetero and LGBT), more heterosexuals have children (25.7% of heterosexuals; 8.7% of LGBT). Regarding age, it is more mature and older people who have children: in the age group 42–59, 52.5% have children, and in the age group 60 and over, 75%. Few of the younger singles have children: 15.6% in the 26–41 age group and 2.1% in the 18–25 age group. Regarding race, whites indicated having fewer children than blacks and people of other races: 22.3% and 29.1%, respectively. Concerning marital status, the people who have more children are divorced (in this group, 69%), separated (53.8%) and widows (63.6%), which indicates the presence of solo mothers and fathers. In the group of those who have never married, only 6.8% have children (or 44 people). When analysed, these variables showed no significant relation in Brazil and Poland.

During the pandemic, we asked with whom the children are living during social isolation, and most Brazilians affirmed that they are with them, especially their mothers.

**Table 5.** Gender and if you have a child/children, who does it live with during social isolation?

Country	Gender	If you have a child/children, who do they live with during social isolation? (%)			
		With me	With the father/mother	With other people (grandparents, aunt, uncle, etc.)	They live on their own, and they are adults
Brazil	Women	74.5	5.7	0.7	19.1
	Men	40.0	50.0	0.0	10.0
Poland	Women	58.5	43.9	0.0	0.0
	Men	41.5	56.1	0.0	0.0

Regarding marital status/type of singlehood, this group represents ongoing social change, with the majority presence of people who had never married, who do not have children, and some social expectations that older people have children and had experienced a marriage relation before, considering the number of divorced people. The ones who had children were with them at this time, and considering that they were mainly single parents, the experience of being single must pay attention to this fact. By the time when the data was collected, in the first months of the pandemic, it was expected that the seek of casual encounters had diminished because many leisure services were closed (such as bars, clubs, and other places where singles usually hang out), and single people were socially isolated. Most participants in this research showed they were not involved in any (casual) relationships.

## 6. Living situation

Regarding the living situations, a large part of the sample of single persons in Brazil shared a residence (70.2%). When analysed by group, 70.9% shared the residence in the women's group; in the men's group, the percentage was 67.7%. The percentage of people living alone in Brazil was 29.8%. In the men's group, there is a slightly higher percentage of those living alone compared to the women's group in the same residence condition (32.3% in the men's group and 29.1% in the women's group), which shows some tendencies in large cities to have more men in this condition.

In the racial group, more people shared residence in the group of blacks and other races: 73%. In the white group, this percentage is 67.7%. In the age group, the percentage of people sharing a residence decreases with age: in the group with



people aged 18–25, 94.2% share a residence; in the group aged 26–41, 63.3%; in the group aged 42–59, 58.2%, and among older people, the percentage is 40%.

Among the group of people who have children, 81.7% share a residence, and in the group of people who do not have children, 67.2% share. This also indicates that more people in the group of those living alone have no children (32.8%), more than in the group of people living alone and having children (18.3%) – in this group, the children are now adults and have left home. In the Brazilian respondent group, there are significant relationships between gender and with whom the child/children was/were living during social isolation  $\chi^2(3) = 23.34$ ;  $p < 0.001$ .  $\Phi = 0.39$ ;  $p < 0.001$ ; significant relationships exist between age and whom the child/children lived with during social isolation  $\chi^2(9) = 61.93$ ;  $p < 0.001$ .  $\Phi = 0.64$ ;  $p < 0.001$ ; there are significant relationships between race and who the child lives with during social isolation  $\chi^2(9) = 20.10$ ;  $p = 0.017$ .  $\Phi = 0.37$ ;  $p = 0.017$ .

Neither the age nor education of Polish respondents affected who they lived with during their social isolation. What makes a statistically significant difference in their answers is gender. Men were likelier to share an apartment with friends than women  $\chi^2(1) = 4.651$ ;  $p < 0.031$ .  $\Phi = 0.077$ .

In the first months when the pandemic was enacted, more people were living alone in Poland than in Brazil. Among Polish respondents, those who lived alone (92.7%) or with friends/acquaintances (7.3%) during social isolation/quarantine predominate.

Related to the type of residence, in Poland, the most commonly declared place of residence was a house (54.6%) and apartments (42%). Other responses totalled 3.3%. Respondents from Poland were slightly less likely than those from Brazil to live in apartments, while living in a house was more common. Both gender and age did not differentiate the results in a statistically significant way. Regardless of gender, respondents were more likely to live in houses than in an apartment  $\chi^2(3) = 3.042$ ;  $p = 0.385$ , and the same was true for the age of Polish respondents, where among each age group, the home was the most frequently indicated  $\chi^2(6) = 3.566$ ;  $p = 0.735$ .

The type of housing reported in Brazil prevailed between apartments (49.7%) and houses (46.8%). Other types (3.2%) were kitnet, loft, and ranch, and two reported living in shacks. In these dwellings, the number of bedrooms prevailed over those with three bedrooms (37.6%) and two bedrooms (33.6%). Some lived in one-bedroom (14.1%) and no-bedroom (1.4%) apartments – characterised by smaller apartments and “kitnets”, respectively, very common in large Brazilian cities and metropolises. Larger residences with four or more bedrooms represented 13.4% of the single-person dwellings in the pandemic context.

The place where Polish respondents spend their time in social isolation is most often four rooms or more (47.7%). Less common are three-room apartments or houses (27.5%), and even less common are two-room apartments (17.6%) and one-room apartments (7.2%). Due to variables such as gender, age and education, no

effect was observed in Polish respondents on the number of rooms they indicated. The results for gender are statistically insignificant:  $\chi^2(3) = 5.299$ ;  $p = 0.151$ , the same for age  $\chi^2(6) = 2.303$ ;  $p = 0.890$  and education  $\chi^2(6) = 4.709$ ;  $p = 0.582$ .

We asked how comfortable the place where people lived in the first months of the pandemic was, and the answers that showed some degree of comfort prevailed in both countries. In Brazil, we found the answers: very comfortable, 48.1%; comfortable, 31.4%; relatively comfortable, 17.9%. The answers that showed some discomfort were of little significance (rather uncomfortable, 2.3%; very uncomfortable, 0.3%). Respondents from Poland most often rated the place where they spent their time during social isolation as relatively comfortable (39.3%) or very comfortable (37.1%). It is also often rated as simply comfortable (14.5%). Overall, Poles rate the comfort of the place they spend time in highly – at least “rather comfortable” for 90.9% of respondents. The remaining 9.1% of responses rate the place as rather uncomfortable (5.7%) or very uncomfortable (3.3%). We consider that the degree of comfort of the residence can be attributed to the fact that people are primarily in their relatively spacious residences with more than one room. When we analyse the groups of people concerning gender, race, housing type, and age, they do not show significant differences.

The degree of comfort is also related to who shares the residence (for those sharing by the time of the pandemic) and the quality of the relationship established with these people. When asked how many people shared the residence with the study participants, those who shared the residence reported that they lived in Brazil mainly with two (20.8%) or one (18.1%) person. 16.8% of the sample reside with three people, 8.4% with four, and 6.1% with five or more. Most respondents from Poland lived alone (92.7%) or with friends/acquaintances (7.3%) during social isolation/quarantine. When asked about the number of people they lived with during social isolation, Respondents from Poland answered that they most often lived alone (37.5%). Less often did they live with one person (26.3%) or two (19.2%). Respondents living with more than two people during this time (three, four, five or more) represent only 16.9% of this group. Poles are more likely than Brazilians to live alone or with one person (63.8% compared to 47.8%) and less likely to live in households larger than two people (in Brazilian respondents, 31.3% of responses). By gender, no statistically significant differences were noted. The responses of men and women are similar – the most frequently indicated response in both groups is to live alone  $\chi^2(5) = 4.894$ ;  $p = 0.429$ . Similarly, age did not differentiate the number of cohabitants in a statistically significant way  $\chi^2(10) = 10.677$ ;  $p = 0.383$ , and so did declared education  $\chi^2(10) = 1.689$ ;  $p = 0.998$ .

For those sharing a residence, the quality of the relationship with the lodger in Brazil was considered suitable to some extent (28.3% said the relationship is “fairly good”; 20% “excellent”), followed by “neither good nor bad” (17.4%), possibly tolerating living in the same space in the pandemic. There were those who reported that the relationship was not good (“bad”, 3%, and “extremely bad”, 1.5%)

(N = 867, with 259 people not answering the question or 29.9% of the sample). There were no significant differences between groups regarding gender, race, type of residence, and those with and without children.

Respondents from Poland who live with other people rate the relationships they form with them as excellent (44.3%), often also as rather good (34.4%), in third place in terms of response rate – as neither bad nor good (15.4%). Compared to respondents from Brazil, Poles are more likely to describe their relationships as great (a difference of 15.8 percentage points), and Brazilians as “rather good” or “neither bad nor good.” However, respondents from both countries rate their relationships positively. The combined percentage of “rather good” and “great” responses is 78.7% among Poles and 68.8% among Brazilians. Age statistically significantly differentiated the responses. Those in the younger age category are likelier to rate their relationships as very bad, while the number of responses positively rating relationships increases with age  $\chi^2(8) = 16.836$ ;  $p < 0.032$ .  $\Phi = 0.188$ .

By gender, men are slightly more likely than women to rate relationships more positively – although this is not a statistically significant relationship  $\chi^2(4) = 5.533$ ;  $p = 0.237$ , it does not rule out or support the hypothesis stating that men rate their lives as more comfortable than women due to the lack of care for others. The hypothesis assuming a higher sense of comfort with permanent employment/work was rejected – statistical measures did not indicate such a relationship. The confirmed hypothesis indicates a correlation between well-being during social isolation (answer “well” in question 45) and the evaluation of relationships with people with whom the respondent lives. The more often respondents feel good during social isolation, the more often they describe their relationships as “excellent” or “rather good,” and vice versa – if they indicate that they never feel good or feel so less often than usual, the more often they describe their relationships as “very bad” or “neither good nor bad.”  $\chi^2(16) = 35.469$ ;  $p < 0.003$ .  $\Phi = 0.274$ .

Hypercoexistence in the same house, with the limitations imposed by the pandemic context, contributed to the emergence of a series of interpersonal conflicts and violence, especially gender violence, with an overload of domestic work for women, for example, an increase in marital violence, and violence against older adults, children, discrimination against LGBT people, among other more vulnerable groups. This group of single men and women timidly demonstrated the existence of some dissatisfaction within their relationships, but here, we could not analyse it further. However, with responses expressing good, excellent and tolerable relationships (neither good nor bad) prevailing, it seems this can be a protective factor against suffering due to social isolation.<sup>1</sup>

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<sup>1</sup> Data and discussion related to the wellbeing of single people will be presented in another report.

## 7. Reflections

The present article sought to bring the characteristics of single people who lived in social isolation in the first months of the pandemic in Brazil and Poland in 2020. Here, we showed the characterisation of the people who participated in the study, bringing socio-demographic characteristics, living conditions, type of singlehood and (casual) relationships. We tried to highlight aspects of social identities in terms of sex/gender, race/ethnicity, and age group data, looking at housing type and parental conditions (who has children and who does not) when they were significant. With that, we collaborated to have a more comprehensive view of this group that participated in the study to build an intersectional look and look for approximations, similarities and particularities from the observed identity markers, which will be deepened later with the analysis of the interviews.

Interestingly, the profile of the people who participated in the study dialogues with other studies on singlehood, which brought to light the reality of single, cisheterosexual, white, urban middle-class adult women living in large cities in Western countries. Our study in Brazil also included this profile: cisheterosexual, childless women who mostly share a house. They are adults aged 18 to 41 years – and in the sample, we have the youngest who have never married and the most mature who are divorced. The study also included black people and people of other colours/race/ethnicity (almost half of the sample), aspects still little discussed in other studies on singlehood (Andrade 2012, 2022). The same situation is about singlehood in Poland. The group participating in this study reflects the socio-demographic characteristics discussed in previous analyses of this phenomenon. It concerns mainly urban slings, women and men from the middle social class, well-educated people, and a significant number of living alone (Żurek 2008; Czernecka 2014; Paprzycka 2008; Izdebski 2016).

The profile also brings in single people who were mainly not involved in an affective/love relationship. In a pandemic context, this seems to be expected, especially in the first months when the virus's behaviour was still being studied by scientists and the guidelines disseminated in the media did not offer guidance on the risks of contagion concerning sexual behaviour. We believe that the fact that most participants stated that they were in social isolation to avoid contaminating themselves and other people contributed to this lack of involvement in relationships in this period – a topic that we will work better in conjunction with analyses of more specific data on sexuality in the pandemic, also bringing information about possible relationships in this context.

One of the most interesting differences we noted is that in Poland, the majority of surveyed individuals, both women and men, lived independently. In contrast, most women and men in Brazil lived with other people during the pandemic. While in Poland, those who lived with someone usually had only one roommate. Statistically, it was several people in Brazil. This may have a significant impact on

further analyses related to the consequences of social isolation on mental health. In the Brazilian group, men often shared accommodation with friends, while women lived with family members. This could also be related to receiving greater emotional support and assistance in women's daily duties to their family members. It is worth noting that there was also a significant statistical correlation regarding with whom women lived, namely with their parents. Another gender-related aspect is that statistically, women who have children are more likely to live with them compared to men.

To conclude, regarding the crossings we sought to make concerning the identity aspects of the group participating in the study, we found a few differences, which have already been discussed throughout the text and will form the basis for future analyses in articulation with qualitative data. After having presented who the people who participated in the study are and how they lived in this setting, the following analyses will bring aspects of the experience of singlehood regarding daily practices of leisure, work, domestic activities, well-being and mental health, sexuality, and projects for the future.


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## MODERN CRISIS OF YOUTH MENTAL HEALTH – THE PERSPECTIVE OF POLAND

**Abstract.** As young people are a vulnerable group, the prevalence of mental disorders in the population has been rapidly increasing in recent years. Not only are young people more at risk from mental disorders, but their lifelong burden accumulates for an extended period. Currently, the scale of the problem is enormous. Thus, various organisations and interest groups sound the alarm about the ongoing mental health crisis.

This study aims to investigate the scale of youth mental health crisis in the context of socioeconomic development. The focus is on the burden on society, the economy, and progress as the underlying problems. The assessment is performed by literature studies and exploratory data analysis that allow for highlighting the ongoing tendencies and new phenomena concerning risk factors and mental disorders of young people, both globally and focusing on the Polish perspective, as well as evaluating the availability of mental healthcare in Poland, Europe, and the world.

The results indicate that mental health and well-being have not been considered healthcare priorities for a long time. In particular, three issues deserve special attention in the youth mental health crisis context. Firstly, addictions, especially Internet- and smartphone-related behavioural dependences, are becoming a global pandemic among young people. Secondly, the impact of the COVID-19 pandemic proved to be catastrophic for the mental health of children and adolescents. Finally, the available mental healthcare and its quality are inadequate to meet the growing needs of young people in the modern world.

**Keywords:** youth mental health, mental disorders, addiction, social burden of mental disorders, health economics, youth mental health in Poland, mental healthcare, socioeconomic development, regional studies

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## WSPÓLCZESNY KRYZYS ZDROWIA PSYCHICZNEGO MŁODZIEŻY – PERSPEKTYWA POLSKI

**Abstrakt.** Rozpowszechnienie zaburzeń psychicznych w populacji gwałtownie rośnie w ostatnich latach, a młodzi ludzie są grupą szczególnie wrażliwą. Są nie tylko bardziej narażeni na zaburzenia psychiczne, ale dochodzi również do trwającej długi czas kumulacji obciążeń. Obecnie skala problemu jest ogromna. W związku z tym różne organizacje i zrzeszenia ostrzegają w związku z trwającym kryzysem zdrowia psychicznego.

Niniejsze badanie ma na celu zbadanie skali kryzysu zdrowia psychicznego młodzieży w kontekście rozwoju społeczno-gospodarczego. Skupiono się na związanych z tym problemem obciążeniach dla społeczeństwa i gospodarki, a także na dostrzeganych postępach w zakresie podstawowych problemów. Ocena tego zjawiska jest dokonywana poprzez studia literaturowe i eksploracyjną analizę danych, które pozwalają na wskazanie bieżących tendencji i nowych zjawisk dotyczących czynników ryzyka i zaburzeń psychicznych młodych ludzi, zarówno globalnie, jak i koncentrując się na polskiej perspektywie, a ponadto ocenę dostępności psychiatrycznej opieki zdrowotnej w Polsce, Europie i na świecie.

Uzyskane wyniki wskazują, że zdrowie psychiczne i dobrostan psychiczny przez długi czas nie były uznawane za priorytety opieki zdrowotnej. W szczególności trzy kwestie zasługują na szczególną uwagę w kontekście kryzysu zdrowia psychicznego młodzieży. Po pierwsze, uzależnienia, zwłaszcza od Internetu i smartfonów, co staje się globalnym problemem wśród młodych ludzi. Po drugie, wpływ pandemii COVID-19 odpowiadającej za katastrofalny stan zdrowia psychicznego dzieci i młodzieży. Po trzecie, dostępna opieka psychiatryczna i jej jakość są nieadekwatne do rosnących potrzeb młodych ludzi we współczesnym świecie.

**Słowa kluczowe:** zdrowie psychiczne młodzieży, zaburzenia psychiczne, uzależnienia, społeczne obciążenie zaburzeniami psychicznymi, ekonomika zdrowia, zdrowie psychiczne młodzieży w Polsce, psychiatryczna opieka zdrowotna, rozwój społeczno-gospodarczy, badania regionalne

### 1. Introduction

As the World Health Organization (WHO) highlighted, mental health is vital in personal and public health and well-being, a fundamental human right, and a crucial sustainable development priority (World Mental Health Report 2022). Mental, psychological, or psychiatric issues are detrimental to maintaining a high level of health, well-being, and quality of life. The WHO specifies numerous mental, behavioural, or neurodevelopmental disorders (referred to in this paper as mental disorders, diseases, illnesses or conditions, for short) broadly defined as clinically significant disturbances of a person's cognition, emotional regulation, or behaviour. (ICD-11 2023; WHO 2022a) Estimates indicate that one in eight people (i.e. almost 1 billion people worldwide) has a mental disorder, with depression and anxiety being the leading conditions. Another statistic shows that one in 100 deaths is attributed to suicide, and there may be as many as 20 attempts per every successful one (Depression and Other 2017; GBD 2019; Mental 2022; World Mental Health Report 2022).

The burden, both social and economic, due to mental disorders is enormous. Mental illnesses are the leading cause of years lived with disability (YLDs) (around 15% of total YLDs) and premature deaths. These conditions lead to over US\$1 trillion

annually in economic losses, as mental health and well-being are crucial components of human capital. Most mental and behavioural diseases are chronic, and treatment and therapy are considered expensive (both “per person” and aggregated population-wise). However, as proven by comparative studies, the lost productivity and socioeconomic burden of mental health conditions greatly outweigh total healthcare expenditures, and yet most countries tend to prioritise other health issues (i.e. cardiovascular diseases, neoplasms) (Iordache et al. 2023; World Mental Health Report 2022).

While mental disorders and their underlying risk factors can occur throughout the life cycle, youth is the most sensitive period due to ongoing physical, psychosocial and cognitive development. For instance, children and adolescents’ long-term exposure to stressful situations, such as family conflict, bullying at school, or cyberbullying via social media, is likely to cause damaging effects on developing core cognitive and emotional skills, leading to various mental and behavioural illnesses. Youth<sup>1</sup> subjected to stress tend to die prematurely within 20 years compared to the general population. As young people are a vulnerable group, the prevalence of mental disorders in the population has been rapidly increasing in recent years. Not only are the young people more at risk from mental disorders, but their lifelong burden (individual and aggregated over the whole population) is also much higher than for the older cohorts as YLDs, lost productivity, and healthcare expenditures accumulate for an extended period. Currently, the scale of the problem is enormous. Thus, various organisations and interest groups sound the alarm about the ongoing mental health crisis (WHO: Factsheet for World Mental Health Day 2018; Wolf et al. 2018).

Hence, this study aims to investigate the scale of youth’s mental health crisis in the context of socioeconomic development.<sup>2</sup> The focus is on the burden on society, the economy, and progress as the underlying problems. The assessment is performed by literature studies and exploratory data analysis that allow for highlighting the ongoing tendencies and new phenomena concerning risk factors and mental disorders of young people, first globally (Section 2) and, subsequently, focusing on the Polish perspective (Section 3), as well as evaluating the availability of mental healthcare in Poland, Europe, and the world (Section 4). The final section of the paper offers a summary and conclusions.

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<sup>1</sup> Various organisations and institutions define different non-mutually exclusive age categories for “young” such as children (age under 14 years), adolescents (around ages 10 to 19), teenagers (ages 13 to 19), underaged (age under legal adulthood i.e. 18, 19, 21 years), young people (age 10–24) or young adults (20 to 28 or 32 or 35 years of age). However, the United Nations (UN) promotes a more general and ambiguous term, ‘Youth’, encompassing people between 15 and 24 years but devoid of bias to other age intervals acknowledged by Member States (i.a., from 12 or 18, up to 32 or 35 years). Youth (often interchangeable with young people), as such, is more of a social category than a legal or demographic one and, thus, may be used as a broader class or complementary with other age groups. (WHO 2021a) This paper adopts the spirit of a broad definition of youth to accommodate the results of a more comprehensive range of studies and to highlight the magnitude of mental problems.

<sup>2</sup> In the study, “progress” or “development” is understood broadly and in more qualitative than quantitative terms. The reason was to add the social and cultural context, as mental disorders tend to change and are contextually dependent.

## 2. Global trends

Assessing global tendencies of the mental health crisis of young people allows us to identify the focal points, such as increasing prevalence, self-harm and suicide, addictions, stress-related issues, as well as the impact of the COVID-19 pandemic and restrictions on mental youth well-being.

### 2.1. General prevalence and burden

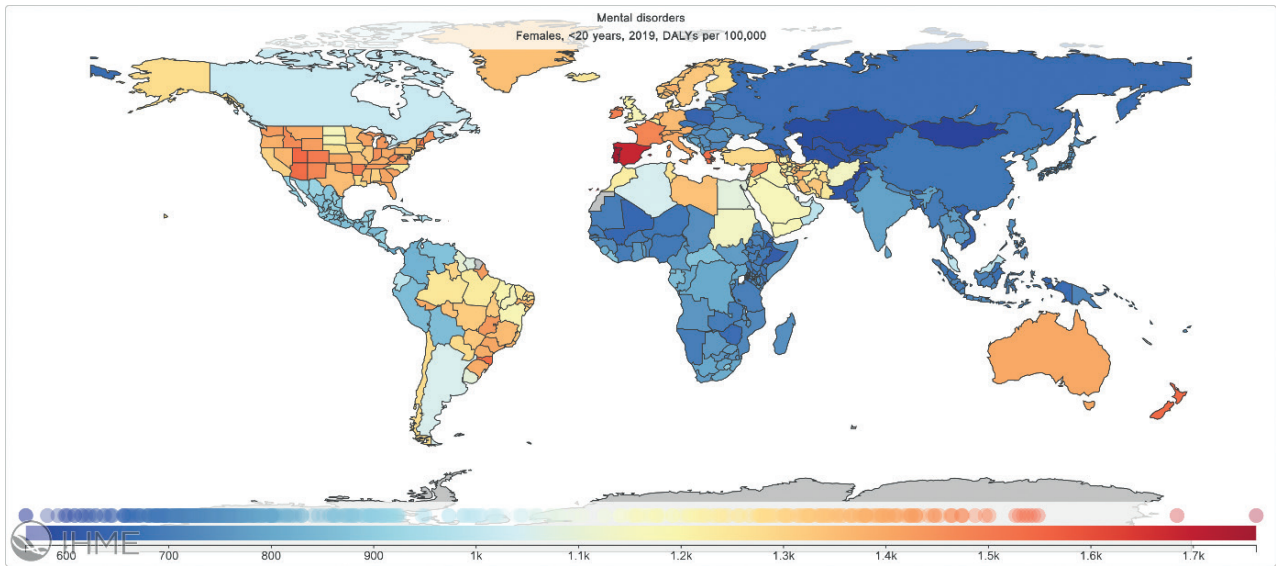
Estimates indicate that more than 0.25 billion, that is, one in seven children and adolescents, are hindered by some mental condition.<sup>3</sup> Mental disorders account for around 13% of the global disease burden among youth, and around half of mental health conditions develop by age 14. Poor mental health is the leading cause of disability for youth. Unfortunately, a significant share of these conditions is undiagnosed and untreated. Additionally, numerous young people suffer from psychosocial issues that do not fulfil a clinical disorder's diagnostic criteria, diminishing their quality of life and mental well-being and hindering future life. (UNICEF<sup>4</sup> 2023; WHO 2020; 2021b).

Global Burden of Disease Study 2019 (GBD 2019) indicates that the socioeconomic burden due to mental disorders for young people is high and increases over time. In the case of young men and women, the disability-adjusted life years (DALYs) per 100,000 people in 2019 were elevated in developed regions of the Americas, Europe, Mediterranean and Australia. In particular, for females, the mental disorder burden was the highest in the Iberian Peninsula and Western Europe, while for males in Australia, New Zealand, Portugal, Greece and some Middle Eastern states. (Fig. 1a and 2a) The share of the mental disorders DALYs in the total DALYs is the highest in Western and Northern Europe, Australia, and Japan. (Fig. 1b and 2b) In almost all countries, the burden of mental disorders among young people increases systematically over time, with the greatest increments in the Americas (especially the United States) and Africa (Fig. 1c and 2c). Notably, the DALYs burden of mental illnesses grows with the level of regional development; hence, it is the largest for both genders under 20 years in high-income countries. The social cost of anxiety and depression seems to increase for the richest states (Fig. 3).

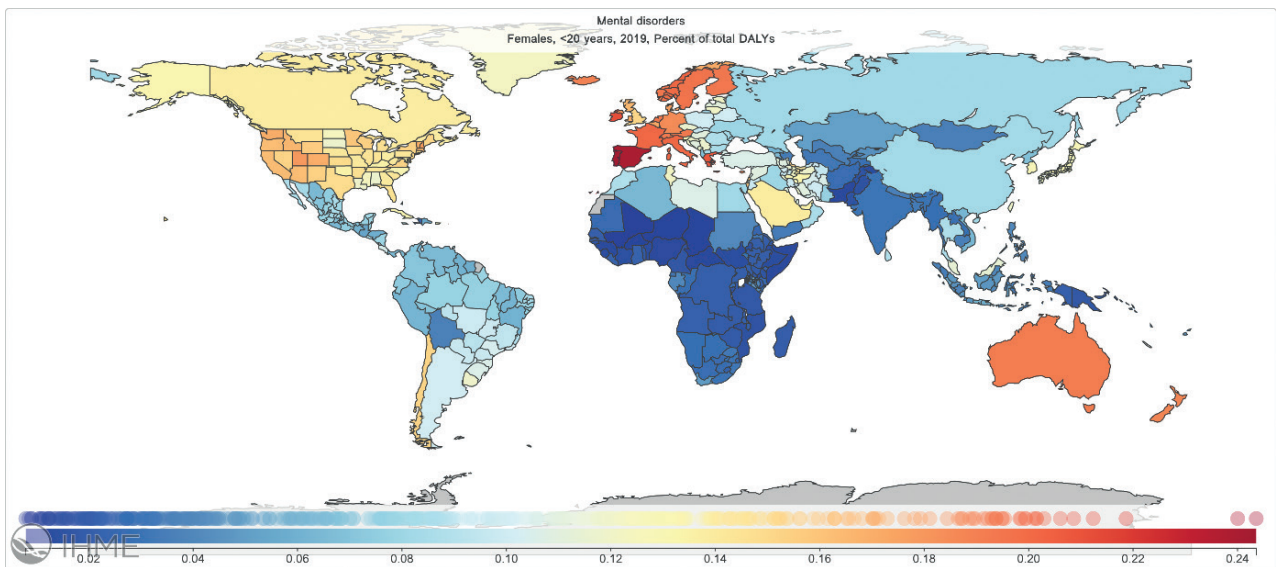
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<sup>3</sup> It should be noted that mental conditions are mostly diagnosed indirectly via symptoms and self-assessment, particularly in epidemiological population studies. Moreover, the definitions of the illnesses may vary across time and countries. Therefore, the results of various studies should be viewed cautiously, and no direct comparisons between alternative research should be made, as different methodologies and questionnaires may have been employed.

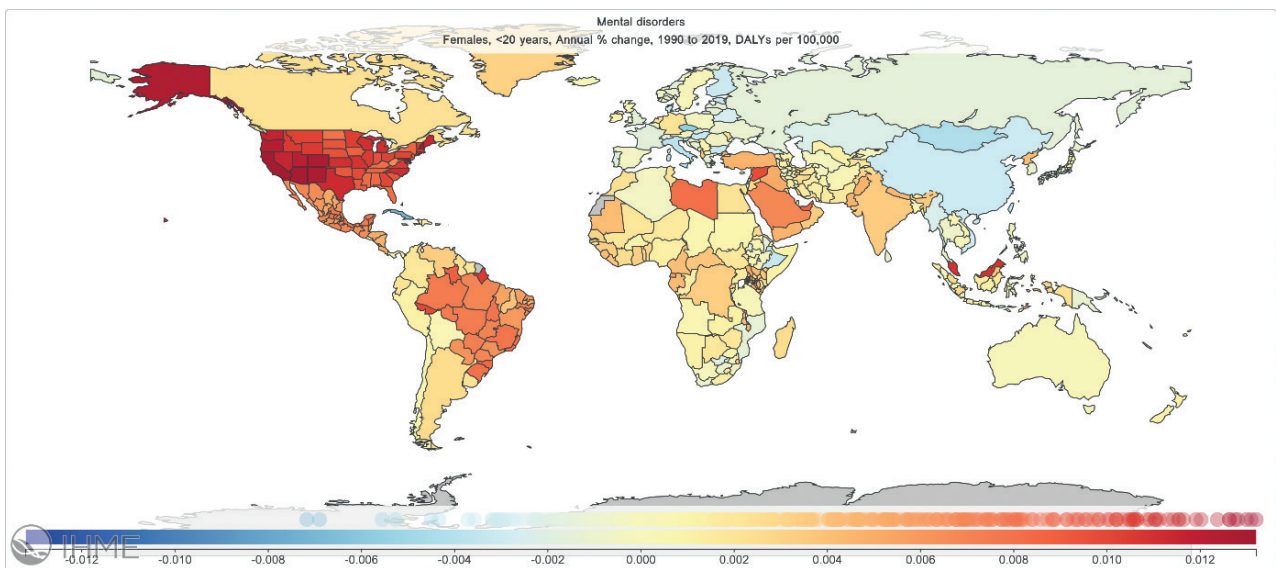
<sup>4</sup> United Nations International Children's Emergency Fund (or United Nations Children's Fund).



a. number of mental disorders DALYs



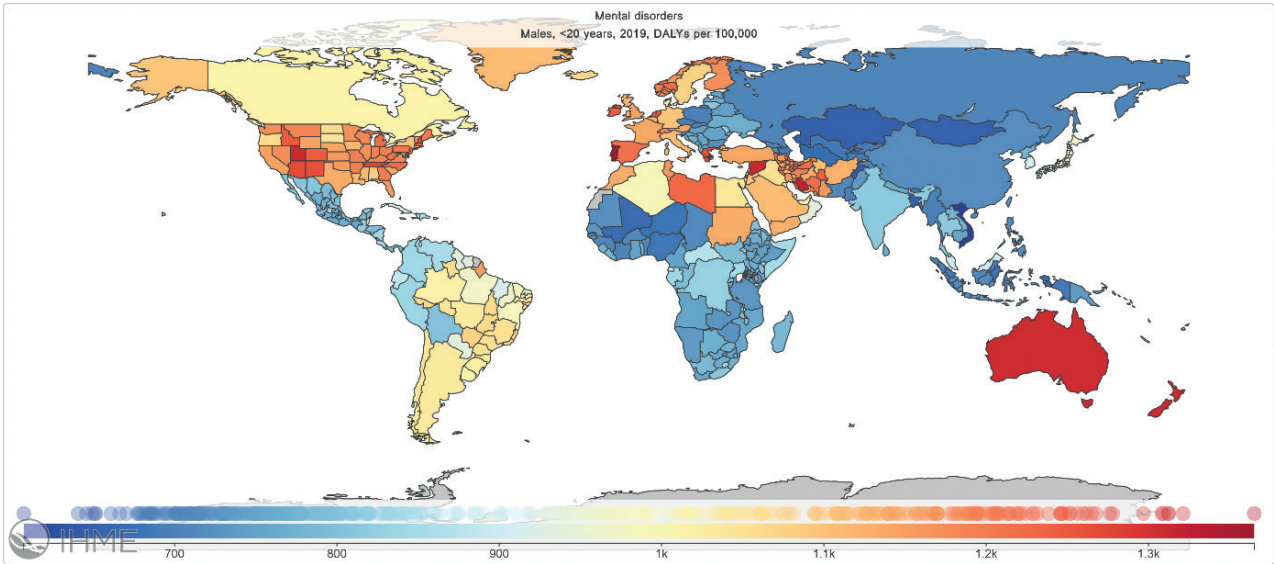
b. share of mental disorders DALYs in the total DALYs



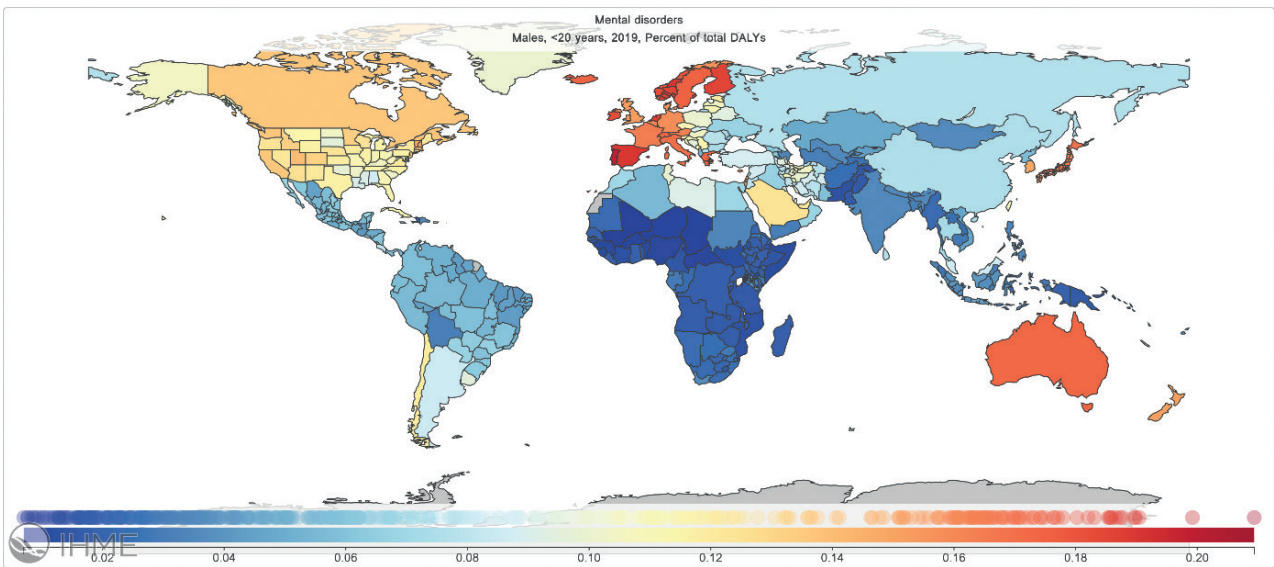
c. annual percentage change of mental disorder DALYs 1990–2019

**Fig. 1.** Female under 20 years of age mental disorders burden measured by disability-adjusted life years (DALYs) per 100,000 people, 2019

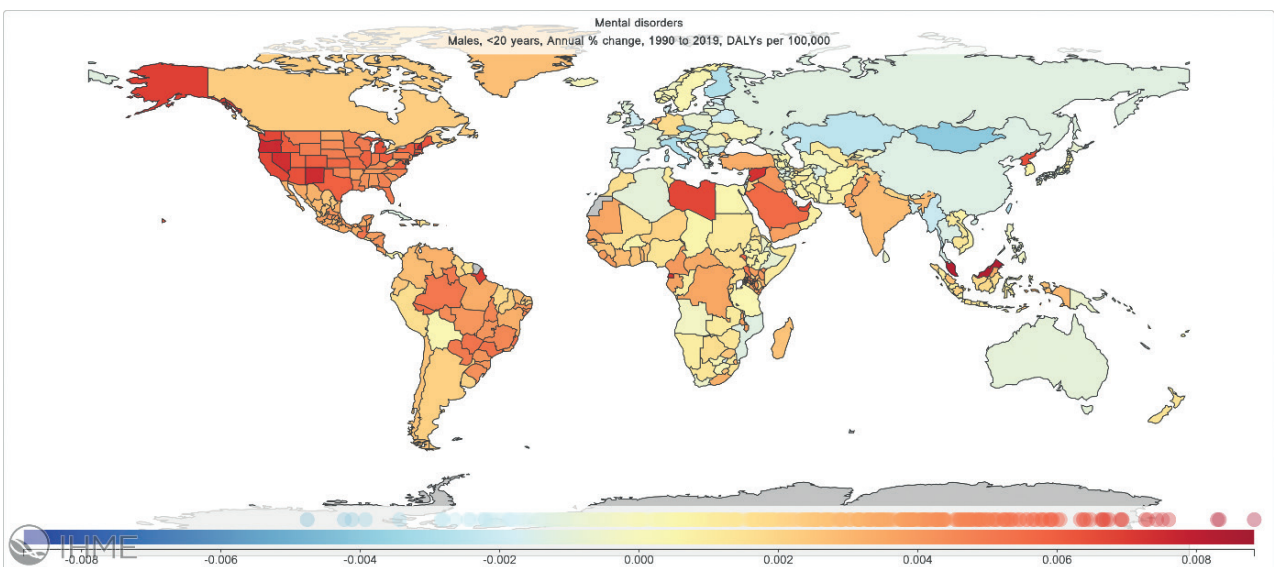
Source: GDB 2019.



a. number of mental disorders DALYs



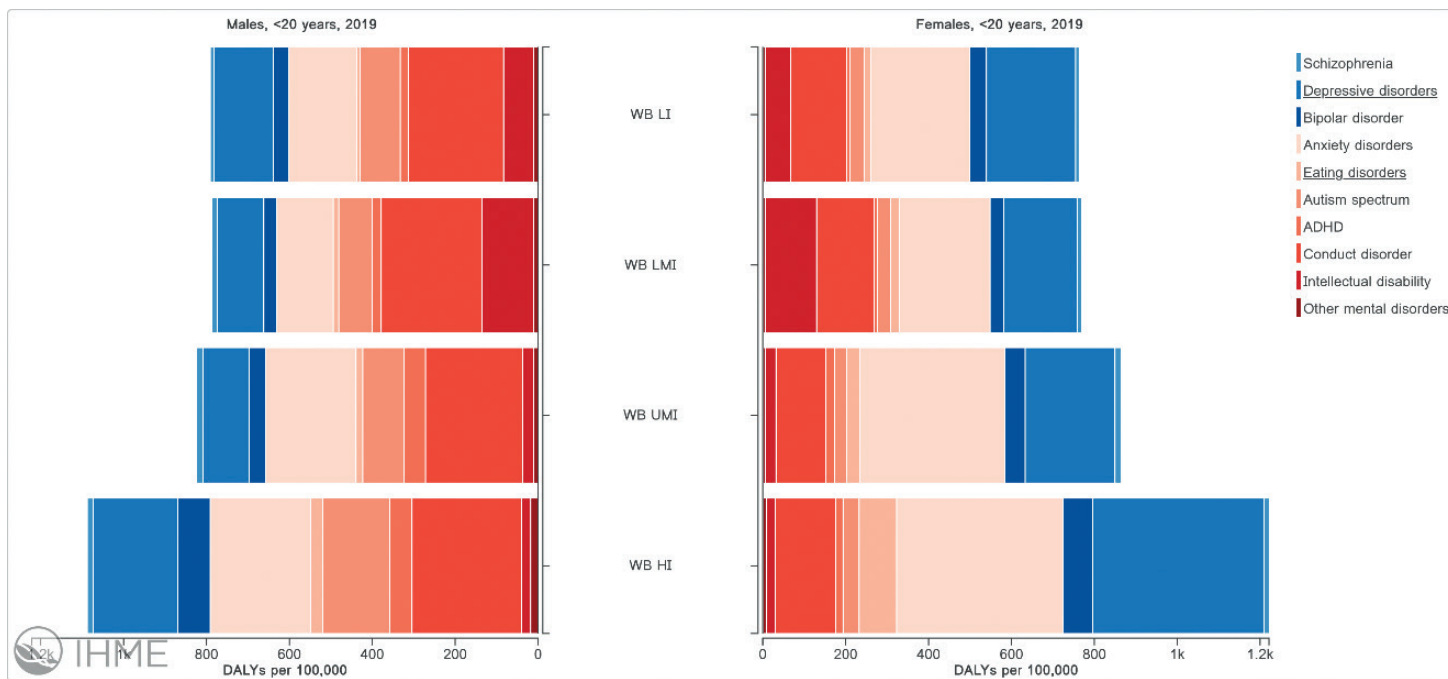
b. share of mental disorders DALYs in the total DALYs



c. annual percentage change of mental disorder DALYs 1990–2019

**Fig. 2.** Male under 20 years of age mental disorders burden measured by disability-adjusted life years (DALYs) per 100,000 people, 2019

Source: GDB 2019.



**Fig. 3.** Male and female under 20 years of age mental disorders burden measured by disability-adjusted life years (DALYs) per 100,000 people, by World Bank country income groups, 2019 (Worlds Bank (WB): LI – low-income countries, LMI – low-middle income, UMI – upper-middle income, HI – high-income countries group)

Source: GDB 2019.

Suicide is another critical mental issue addressed in the United Nations Sustainable Development Goals (SDGs) and WHO's Comprehensive Mental Health Action Plan 2013–2030. While 77% of suicides occurred in low- and middle-income countries where most of the world population lives, the highest age-standardised suicide rate of 10.9 per 100,000 is observed in high-income countries. For youth, suicide constitutes the third (female) or fourth (male) leading cause of death (Training manual 2022).

Addictions are also conditions for which the youth are the highest risk group. Numerous studies indicate that behavioural dependences may have become the modern epidemic among young people. Sharma et al. study (2023) suggest the prevalence of smartphone dependence among adolescents at 23% with 77.2% comorbidity with depression. Regarding Internet use, various studies show dependency frequency between 4.9% and 56.9% of youth (Bekar, Arıkan, Çapık 2022). A survey by Allahverdi (2022) indicates that 70% of students self-report being addicted to social media, with a significantly higher share of females. The prevalence of online gaming addiction varies from 0.6% to over 22% in the young population (Hu 2022).

## 2.2. COVID-19

Natural disasters, military conflicts and other emergencies have a detrimental impact on mental health, and the consequences more severely burden vulnerable groups like children and adolescents. (Gawrych 2022; Goto et al. 2023) The mental health and well-being of most people in the world have been temporarily or permanently impacted by the COVID-19 (or SARS-Cov-2) pandemic and subsequent restrictions (social distancing, lockdowns, online schooling, studying and working, limited access to mental healthcare) that occurred worldwide between 2019 and 2022. WHO estimates indicate that globally, in 2020 alone, the COVID-19 pandemic has led to a prevalence increase of 27.6% for depressive disorder (with 137.1 additional disability-adjusted life years – DALYs per 100,000 population) and 25.6% for anxiety disorders (with added 116.1 DALYs per 100,000 population). Moreover, individuals with preexisting mental disorders were at greater risk of severe illness and death from COVID-19 and should have been considered a risk group upon diagnosis of infection. As data indicate, females and youth, especially those aged 20–24, were more affected than males and older adults (Mental Health and COVID-19 2022).

Children and adolescents have suffered dramatically during the COVID-19 pandemic from the sudden withdrawal from school, social life, and outdoor activities. Some of them have also experienced increasing domestic violence. Young people's stress during the period directly affected their mental health due to increased anxiety and fear (Chałupnik et al. 2022). Besides the adverse effects of COVID-19 and its burden, children, adolescents and young adults were psychologically affected by lockdowns with boredom, loneliness, frustration, irritability, quarrelsomeness,

restlessness, sadness, anger, and worry, which were detrimental to their mental well-being. Even post-traumatic stress symptoms were diagnosed as a result (Abdulah, Piro 2022; Brooks et al. 2020; Carey, Povey, Taylor 2022; Layachi, Schuelka 2022; Morgül, Kallitsoglou, Essau 2020). It has also been noticed that children and adolescents were less likely to report worsening mental health than adults (Leigh et al. 2023). From the parents' perspective, more than two-thirds declared that due to social isolation and lack of contact with peers, they witnessed a deterioration in their children's emotional well-being (72%), behaviour (68%) and physical health (68%) (RPD 2023).

Numerous research highlighted increased Internet and smartphone use during the COVID-19 pandemic. As a result, the prevalence of internet addiction among adolescents increased significantly, as well as an addiction to online gaming for males and to social media for females (Carkaxhiu Bulut, Gokce 2023; Rathi, Guha, Neogi 2022; Yılmaz, Aydoğdu, Koçtürk 2022).

As COVID-19 is now not considered a worldwide public health emergency and most restrictions have ended, acute mental disorders are expected to decrease. However, many harmful psychological effects are likely long-term and will impact young people's development and future choices.

### **3. The Polish perspective**

An evident duality is present in Polish studies of youth's psychological well-being. Before the COVID-19 pandemic, mental health epidemiological research was sparse and superficial, often based only on mortality and treatment statistics. The COVID-19 pandemic turned out to be a breakthrough in the perception of youth's mental health in Poland. Both public and private institutions have carried out numerous survey studies.

#### **3.1. Pre-pandemic studies**

In Poland, the deep interest in mental health in general, and of youth in particular, is a relatively new phenomenon. Tabak (2014) pointed out that over a decade ago, literature needed more methodological aspects and empirical results assessing the mental well-being of children and adolescents. Scarce existing mental health reports focused on adults or above 15 years, while public health research of the underaged only briefly mentioned psychological aspects. The research gap was a direct result of undervaluing mental conditions as well as related epidemiological studies for young people.

Available rudimentary data indicate that between 2005 and 2008, there was an upward trend in the incidence of mental disorders among children and adolescents, as measured by the number of people treated per 100,000 population. In 2008, patients aged 0–18 accounted for 9.2% of all patients treated in outpatient psychiatric care.



The most common conditions among children and adolescents attending a mental health clinic were behavioural and emotional disorders (587,6 per 100,000 of the population) as well as stress-related neurotic disorders. The second leading cause of hospitalisation was disorders triggered by using psychoactive substances, the most common of which was addiction. An increased prevalence of illnesses caused by alcohol use in the youngest age group was noticed. Moreover, suicides were one of the dominant causes of death among youth and accounted for 12.2% of all suicides in Poland. In the 15–19 age group, a suicide attempt was the cause of death for 26% of males and 16% of females (Tabak 2014).

Research based on the Ministry of Health data showed that in 2011, 108,707 people aged 0–18 were treated for mental disorders other than addictions, constituting 1.3% of the age group. Nevertheless, parallel survey studies indicated that the prevalence of mental conditions exited 30%, with depression and eating disorders as leading issues. Significant discrepancies between the number of youth registered in treatment and the epidemiological research indicate that a substantial part of this population remained outside professional care (Tabak 2014).

Between 2014 and 2016, according to various sources, the share of children and adolescents with mental disorders needing professional care ranged from 9% to 15%. In 2014, the number of suicides of youth under 19 in Poland was in second place in Europe (Rudnik, Wachowiak 2020). In 2016, 42% of youth (48% for girls and 36% boys) exhibited symptoms of mental health disorders. Between 2008 and 2016, the percentage of young people experiencing internalising problems increased significantly. The leading cause was the increase in the prevalence of depressive symptoms (Bobrowski, Ostaszewski, Pisarska 2021).

### 3.2. Pandemic and post-pandemic studies

The COVID-19 pandemic has undoubtedly changed the world as we know it in many ways. The disease's cumulative socioeconomic costs are enormous, with excess deaths and the burden due to acute and long-term physical and psychological symptoms. However, as the prevalence of mental disorders, especially among young people, increased, so did the awareness and interest of medical professionals, society, socioeconomic researchers, non-governmental organisations (NGOs), and public institutions in Poland. As a result, numerous studies were performed over the years 2020–2023 concerning the wide range of mental well-being of children and adolescents, constituting an unexpected benefit of the COVID-19 pandemic.

Polish Ombudsmen for Children (pl. *Rzecznik Praw Dziecka*, RPD), among other activities, studies the health of children and adolescents in Poland. The RPD 2021 and RPD 2023 reports focus on mental well-being. 80% of school children assess their mental functioning as good without needing external intervention. Among those experiencing some mental issues, the most prevalent problems are often not wanting to do anything (32%) or feeling sad (29%). It has been noted that mental health

self-assessment among Polish students deteriorates with age, and girls are particularly vulnerable to declining self-esteem. A supplementary study on parents indicated that they overlook the full extent of children's mental problems or the decline of well-being over time. For instance, while 37% of youth feel lonely, only 17% of parents observe this problem in their children. In the context of the COVID-19 pandemic and related restrictions, data analysis from the Children's Helpline of the Ombudsman showed an increase in the frequency of anxiety, tension, and loneliness.

Alternative, independent research is mainly carried out by NGOs, research institutions, and some with media cooperation. These studies are often comprehensive in assessing the youth's mental well-being. Among them are the reports by Empowering Children Foundation (pl. *Fundacja Dajemy Dzieciom Siłę*), UNaweza Foundation, Health Education and Psychotherapy Foundation (pl. *Fundacja Edukacji Zdrowotnej i Psychoterapii*), and Difference ordered by Radio Zet deserve special attention.

Empowering Children Foundation reports indicate that the number of children and adolescents covered by specialist assistance due to mental disorders has been growing in recent years. A study in 2021 of children and adolescents aged 7–17 estimated that internalising disorders (e.g. fears, phobias) may affect 7.3% of people, affective disorders (e.g. depression, mania) – 1.7%, and externalising disorders (e.g. behaviour, oppositional defiant behaviour, ADHD) – 4%. Eating disorders affected 2.6% of this group, and conditions related to the use of psychoactive substances – 4.2%. Suicide thoughts were experienced by 5.7%. Overall, internalising disorders prevailed among younger children, while among adolescents – externalising disorders peaked around 16–17 years of age. LGBT+ youth are a vulnerable group in Poland – 75% of non-heteronormative teenagers feel lonely, 41% often have suicidal thoughts, and 55% exhibit at least moderate symptoms of depression, only 22% have a sense of acceptance on the part of their mothers and 12% – on the part of their fathers (Makaruk, Włodarczyk, Szredzińska 2020; Szredzińska 2022).

According to the Empowering Children Foundation studies during the first wave of the pandemic, 30% of youth aged 11–17 negatively assessed their satisfaction with life during this period, with the leading causes of the mental well-being decline being lack of contact with peers, the need to sit at home, and remote learning. Suicide, suicide attempts, and self-harm are notable benchmarks of the mental health crisis. Generally, those statistics are high in Poland. In 2021, suicide was the second leading cause of death among teenagers aged 15–19 (i.e. 20% of all deaths in this age group). During the first lockdown between March and June 2020, nearly 3% of respondents aged 15–17 tried to take their own lives, and 9.2% of youth admitted that they had experienced intentional self-mutilation (Makaruk et al. 2020; Szredzińska 2022).

UNaweza Foundation Report (Dęsbki, Flis 2023) indicates that the most common mental issues of Polish youth are: lack of motivation to act (declared by 52.4% of respondents), feelings of loneliness (37.5%), problems sleeping (37%), lack of self-acceptance (32.5%), learning problems (31%), and no will to live (28%). Among risky behaviours, the most prevalent seems to be trying to lose weight

regularly (32.8%) and self-harm (16%). Almost half (46%) of young people have extremely low self-esteem, and 27.4% believe their value depends on the acceptance of others, while 10.5% feel that no single person fully accepts them. External threats include online hate experienced by almost half of children and adolescents, peer violence that 9.5% of respondents deal with, feeling neglected by their parents (11.5%), and being victim to domestic violence (acknowledged by 4.5%).

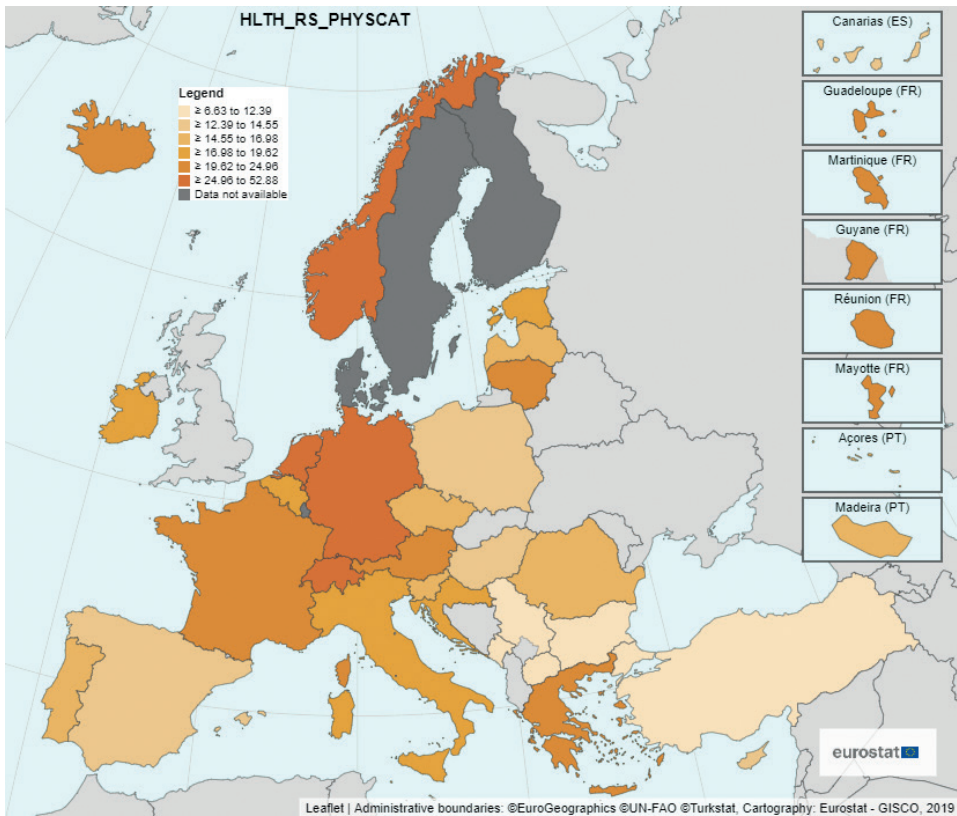
A Health Education and Psychotherapy Foundation report shows that 43% of adolescents declare difficulties related to mental health. In particular, 75% of respondents worry about the future, 62% have trouble sleeping, 43% think about death, and 70% feel more nervous and irritable than before the COVID-19 pandemic, restrictions, and online schooling (Białocka 2021). These alarming statistics are confirmed in the Difference (2021) report ordered by Radio Zet. Furthermore, the COVID-19 pandemic resulted in online schooling and transferring social activities and entertainment online and, as Sikorska et al. (2021) study proved, increased time spent in a virtual environment corresponds with higher levels of depression, anxiety, and stress. The duration of online activity is also negatively correlated with psychological, emotional, and social well-being.

## 4. Mental healthcare – Poland, Europe, world

Essential factors in assessing mental health and well-being are the availability and accessibility of mental healthcare, its resources and financing, the quality of professional aid, and the level of meeting mental health needs.

### 4.1. Overview of the resources

Globally, the median number of mental health workforces is 13 per 100,000 population in 2019, with high dispersion over World Bank states' income groups. Recorded values vary between below two in low-income and 60 per 100,000 population in high-income countries (Mental health atlas 2020). In Europe, in 2021, the median number of psychiatrists per 100,000 population was almost 17, ranging from 6.63 in Turkey to 52.88 in Switzerland (Fig. 4). In the long term, the number of psychiatrists increased in most European countries. In Poland, there were only 13.02 psychiatrists per 100,000 people (Eurostat data). The most current data (30.04.2023) of the Supreme Medical Chamber (pl. *Naczelna Izba Lekarska*) indicate that in Poland, there are 4554 practising psychiatrists, that is 14.95 per 100,000 of the adult population and 543 active children and adolescent's psychiatrist – thus there are 9.57 doctors per 100,000 underaged inhabitants or 10,444.58 potential patients per one doctor. These statistics indicate that the availability of youth mental care in Poland is dramatically low (*Naczelna Izba Lekarska; Baza Demografia*).



**Fig. 4.** Number of psychiatrists per 100,000 inhabitants, 2021

Source: Eurostat data.

According to WHO, the median number of mental hospital beds per 100,000 population varies between income groups, from around two in low-income countries to over 25 in high-income countries. Globally, the median number of mental hospital beds reported per 100,000 population increased from 6.5 beds in 2014 to 11 beds in 2020 (Mental health atlas 2020). In Europe, in 2021, the median was 74.65 beds, after a 12% decline compared to 2003. In Poland, the number of beds declined by 15% between 2003 and 2021, placing it in the European bottom quartile with 60.68 beds per 100,000 inhabitants (Fig. 5, Eurostat data).

In the case of youth mental healthcare in Poland, in 2019, in five provinces (i.e. Lubuskie, Opolskie, Świętokrzyskie, Warmińsko-Mazurskie and Zachodniopomorskie), there was not a single psychiatric day care ward for children and adolescents, and in Podlaskie there was no inpatient ward. Depending on the province, there were 2,155 to 13,537 children per bed in inpatient care (Szredzińska 2022).

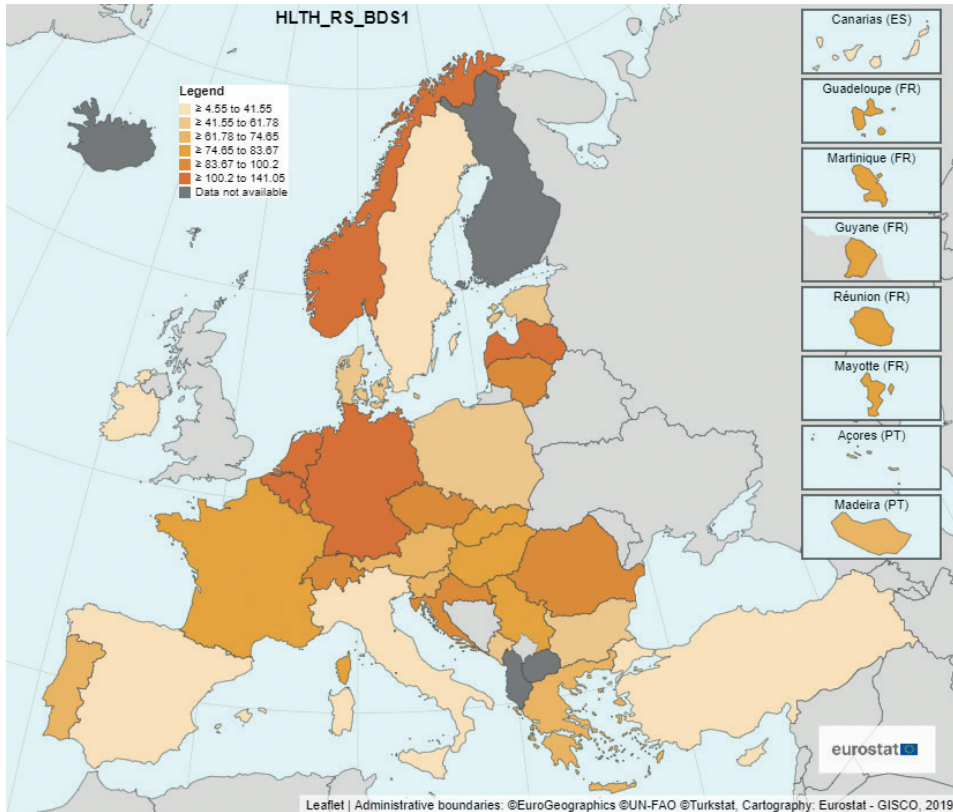
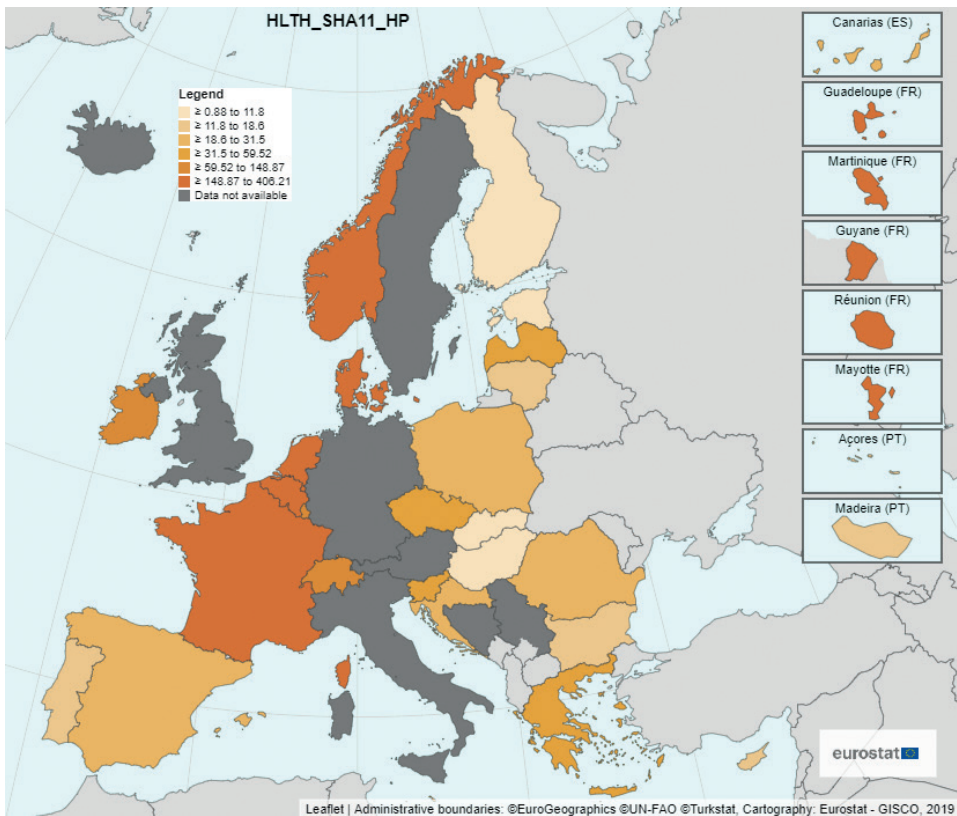


Fig. 5. Number of hospital beds in psychiatric care per 100,000 inhabitants, 2021

Source: Eurostat data.

Public expenditure on mental health is low worldwide, with a global median of 2.1% of government total health expenditure, especially in low- and middle-income countries (Mental health atlas 2020). Mental healthcare expenditures, for the most part, are directed at mental hospitals. In Europe, in the case of psychiatric hospitals, the spending per capita varied significantly in 2020 between 0.88 in Finland and 406.21 purchase power standard euro (PPS) in Norway. Polish expenses were below the median value at almost 19 PPS per person (Fig. 6). In most states, the expenditures tend to rise over time, but Poland experienced a slight decline from 2011 to 2021. Mental hospital expenses constitute 1.19% of the total Polish healthcare expenses, slightly below Europe's median value (Eurostat data).

Unfortunately, statistical and financial data are not gathered or easily accessible for youth mental healthcare. Considering the ongoing mental health crisis of children and adolescents, special attention should be given to a relevant subdivision of resource information.



**Fig. 6.** Healthcare expenditure on mental hospitals, 2020  
(purchasing power standard (PPS) per inhabitant)

Source: Eurostat data.

## 4.2. Meeting the needs

According to the WHO World Mental Health Report (2022), countries contribute less than 2% of their healthcare expenditures to mental health on average. In middle-income states, over 70% of mental health spending is directed at psychiatric hospitals, which have limited efficiency in treating a wide range of mental conditions, including mood disorders, addictions, and neurodevelopment illnesses. From a global perspective, more than half the world population lives in regions with less than 0.5 psychiatrists per 100,000 and limited availability of essential psychotropic medicines. In many countries, particularly low-income, there are no formal mental health services, and often, even if available, they are inaccessible or unaffordable. Due to persisting discrimination, ostracism, and stigmatisation, people frequently choose to suffer mental distress without relief rather than utilise mental health services. Even in states with reasonably high levels of mental healthcare, there are gaps in service

coverage and variability in quality of care across regions and socioeconomic groups. As a result, a high share of people with mental conditions are not diagnosed, and most of the diagnosed go entirely untreated (World Mental Health Report 2022).

In Poland, as demonstrated by the Supreme Chamber of Control (pl. *Najwyższa Izba Kontroli, NIK*) investigation of psychiatric treatment availability for children and adolescents in 2017–2019, mental healthcare does not meet the needs. It does not provide comprehensive and universally accessible psychiatric support (NIK 2019).

The COVID-19 pandemic not only had a significant impact on the mental health and well-being of youth but also on the functioning of the healthcare system. The lockdowns and transfer of resources to epidemiological facilities severely disrupted mental health services, and the treatment gap for mental health conditions has widened (World Mental Health Report 2022). One-third of countries reported complete or partial disruption of delivery of mental, neurological and substance use interventions. 35% of states declared that even life-saving emergency and essential services were affected, while 30% indicated interruption in the supply of related medications. As a result, only around 30% of mental health services for children and adolescents were available with no disruption (The impact of COVID-19 2020).

In Poland in 2020, the inpatient psychiatric care for children and adolescents was mainly interventional. Only 22% of children's admissions were planned in psychiatric wards, while 74% concerned emergency cases. This admittance structure means that the system shifted from treating diseases to crisis and life-threatening situations management. Waiting time for psychiatric help for youth was extensive – 66 to 330 days for stable cases and 8–213 days for emergencies (Szredzińska 2022).

As presented, the mental healthcare of youth is dramatically lacking in Poland, Europe, and the world. The financial resources, facilities and medical specialists are insufficient to battle the mental health crisis that haunts young people around the globe. It can be argued that professional help is expensive, but failing to meet youth's mental health needs generates enormous costs. For instance, a global lifelong income loss due to unaddressed children and adolescents' mental health needs caused by humanitarian emergencies amounts to US\$203 billion. Overall, estimates prove that the economic benefits of investing in mental healthcare and psychosocial support outweigh the implementation expenditures (UNICEF 2023).

## 5. Conclusions

Mental health and well-being have not been considered healthcare priorities for a long time. Despite the unequivocal advancement in understanding mental issues and establishing guidelines, the global improvement accomplished in this field over the last two decades has been insufficient to prevent and counteract the mental health crisis we now experience (World Mental Health Report 2022). Neglecting and underestimating the complexity and severity of mental conditions

lead to a rapid rise in prevalence and low availability, accessibility, and quality of treatment. This problem is especially worrisome for children, adolescents and young adults for two reasons. Firstly, due to the lower social and psychological development level, they are more vulnerable to the impact of various risk factors and, thus, more likely to develop mental illnesses than adults. Secondly, falling ill with a mental condition at an early stage in life results in a higher life-long burden of the disease for the person, their loved ones, society, and the economy. Cumulative economic costs of youth mental health issues include private and public expenditures and loss of income and productivity. Social effects incorporate comorbidity with other psychological and physical diseases, loss of healthy life years, diminished quality of life, premature death, family difficulties, and disrupted social interactions.

In the youth mental health crisis context, three issues deserve special attention. Firstly, undoubtedly, the prevalence of mental illnesses among young people has been and, most likely, will continue to increase rapidly, but the structure of most common disorders evolves over time. Remarkably, Internet- and smartphone-related addiction have risen in frequency as the omnipresence of the smartphone and online activity is perceived as natural for the digital generation, making it difficult to distinguish pathological symptoms from ‘normal’ behaviours (Jeong, Suh, Gweon 2020).

The second key aspect of youth mental health that needs addressing is the impact of the COVID-19 pandemic. A very rapid increase in new mental symptoms and declining access to dedicated healthcare for both new and preexisting conditions has the unprecedented potential to undermine the health and well-being of young people worldwide. Evidence from past emergencies suggests potentially elevated risks of anxiety and depression, trauma, self-harm, and even suicide among adolescents (WHO 2022b). Due to non-sustainable regional development, natural disasters and extreme weather conditions caused by climate change, global and local epidemics and military conflicts have become more frequent. Hence, the prevalence of mental health conditions and related socioeconomic burdens will rapidly increase in the upcoming decades.

Finally, the available mental healthcare and its quality are inadequate to meet the growing needs of children and adolescents in the modern world. Moreover, the policies and system structure seem to be outdated as they do not employ the most effective treatment methods and fail to respond to the evolving social aspects and technological advancement that constitute fundamental determinants of the current mental health of young people.

Surprisingly, in Poland, the detrimental impact of pandemics on youth mental well-being advanced social awareness and initiated numerous studies into youth psychological problems. Unfortunately, as it turned out, the situation of the mental condition of young people and related healthcare proved to be dire. Numerous pandemic and post-pandemic studies indicate a rising prevalence of anxiety, depression, self-harm, suicide symptoms, and addiction, while the treatment continues to be scarce, insufficient, and underfunded. Thus, as a result, it can be expected that youths’ mental health and well-being in Poland will continue to decline.



As presented in the paper, the global youth mental health crisis should not be treated lightly. International organisations like WHO, UNICEF, UN and local NGOs sound the alarm, as the inevitable and constant social, economic, and technological progress is detrimental to the youth's mental health. Rapid changes in the modern lifestyle and traumatic events (global, local, and individual) tend to impact children and adolescents' psychosocial development negatively. Furthermore, those young people plagued with mental conditions will grow into adults hampered by internal problems. These grownups will constitute a society burdened with an unprecedented prevalence of a wide variety of mental disorders and associated tremendous social and economic costs. As the byproduct of the modern world's progress, the current youth mental health crisis may be just the harbinger of future catastrophe if appropriate action is not taken immediately. The necessary changes should be multidimensional and address the underlying determinants and the diagnostics and treatment of young people.

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## THE TENURE OF THE LOCAL EXECUTIVE TENURES ON THE EXAMPLE OF LOCAL GOVERNMENT ELECTIONS IN THE ŁÓDŹ VOIVODESHIP

**Abstract.** The article concerns issues related to the tenure of the executive body in Polish local government units. The paper aims to make a spatial analysis of the phenomenon of multicadency of mayors in Łódź voivodeship. The study was carried out in two dimensions: spatial (rural municipalities in Łódź voivodeship) and temporal (local government elections in 2002, 2006, 2010, 2014 and 2018). The analysis based on data from the State Election Commission revealed that re-election is a frequent phenomenon in the rural municipalities of Łódź voivodeship. It is probably because local authorities respond to the needs and expectations of voters. This strengthens their positive feelings, increases satisfaction and leads to the formation of positive motives for participation in local government elections and election decisions (identified with the re-election of the municipal executive).

**Keywords:** local elections, term of office, executive body

## KADENCYJNOŚĆ WŁADZY WYKONAWCZEJ NA PRZYKŁADZIE WYBORÓW SAMORZĄDOWYCH W WOJEWÓDZTWIE ŁÓDZKIM

**Abstrakt.** Artykuł dotyczy zagadnień związanych z kadencyjnością organu wykonawczego w polskich jednostkach samorządu terytorialnego. Celem artykułu jest dokonanie przestrzennej analizy zjawiska wielokadencyjności wójtów województwa łódzkiego. Badanie przeprowadzono w dwóch wymiarach: przestrzennym (gminy wiejskie województwa łódzkiego) i czasowym (wybory samorządowe w latach 2002, 2006, 2010, 2014 i 2018). Analiza dokonana w oparciu o dane z Państwowej Komisji Wyborczej ujawniła, że ponowny wybór to częste zjawisko w gminach wiejskich. Wynika on prawdopodobnie z tego, iż władze lokalne odpowiadają na potrzeby i oczekiwania wyborców. Wzmacnia to ich pozytywne odczucia, zwiększa zadowolenie i prowadzi do kształtowania pozytywnych motywów udziału w wyborach samorządowych oraz decyzji wyborczych (utożsamianych z reelekcją organu wykonawczego gminy).

**Słowa kluczowe:** wybory samorządowe, kadencyjność, organ wykonawczy

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## 1. Introduction

Civil society allows for many value systems based on strong ties and numerous structures involving the activity of the inhabitants, where participation is voluntary. An essential feature of the above mentioned is respect for democratically established legal principles (Halamska 2001). In the pluralistic society model, the role of territory as the basis of social bonding and the principle of organisation of social life is strongly emphasised. One of the essential institutions of the civil social order is the local government (Starosta 1995). Local government here is elected through processes of competition among themselves (local elections), which is one of the manifestations of a democratic state and one of the most important mechanisms for the functioning of the political system. It is a tool to represent social preferences in an aggregated result, allowing for the election of a representative for a specific position (Markowski 2015). Local government are, among others, a method used to select from among candidates the persons to hold the position of a mayor (mayor of the city, president of the city) (Wojtasik 2013). In Poland, the election of this executive body in municipalities against the background of all general elections is a complicated and elaborate procedure.<sup>1</sup>

An essential element of the electoral system is the term of office, understood as the number of terms allowed for one person. Since the changes to the local government system in 2018, the term of office of a mayor (mayor of the city, president of the city) lasts five years (2018–2023). However, this extension of the term of office from four to five years has been accompanied by a reduction in the number of possible terms of office. People elected in the 2018 elections can serve a maximum of two terms (2018–2023, 2023–2028) (Sikora 2020). The introduction of this limitation has significantly changed the existing “rules of the game” in the Polish local government.

Furthermore, it should be taken into account that two different types of actors are involved in the political recruitment process: the elected and the electors (“selectors” and “selectees”) (Wasilewski 1990). When choosing a candidate, voters take a prior interest in which people they want to sit in the office and make decisions that relate to their daily lives. As a result, elections enable the electorate to influence the composition of representative bodies, and the outcome of the vote indicates the level of satisfaction the electorate has with the person running (often once again) for office. It is also an appreciation of the merits and past benefits of good governance and administration of local affairs, which voters recognise and reward through re-election (Detka 2011). To the greatest extent, electoral success is influenced by people already in power. This situation tends to provide an advantage due to direct

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<sup>1</sup> This is due, among other things, to the fact that the largest number of local authorities are elected on a single day (in 2018, 2 477 of a mayor (mayor of the city, president of the city) were elected out of 6 958 candidates).

prior municipal governance. An incumbent mayor running for re-election makes it easier for voters to make a choice, in which case, among other things, the decision on whom to vote for is made more quickly and, simultaneously, less interest in the election (Bartnicki 2019).

According to P. Starosta, within the framework of a local community and a pluralistic order, the voter “takes action based on his or her discernment and calculation and acts prompted by an interest in the affairs of his or her area or community. (...) The goal of an individual’s action is oriented towards the good of the local system. It stems from an individual conviction, belief or internal stimulation supported most often by specific knowledge” (Starosta 1995: 200). Due to the strong position of a mayor as the executive body in Polish municipalities, local government elections usually take the form of direct and personalised competition. Elections of local government bodies are accompanied by particular emotions, mainly due to the importance of a single citizen’s vote, which may determine the winner. Consequently, there is an intense struggle on the part of the local authority for each voter, which is usually linked to the desire for re-election. By voting for a given candidate, residents indicate that they trust them, entrusting them with this function through their vote (Chrobak, Niezgoda 2006).

The article aims to make a spatial analysis of the phenomenon of the multicadence of mayors in the Łódź voivodeship. At a simple glance, the introduction of legal regulations is straightforward and transparent. However, the lack of verification and identification of re-election of executive bodies,<sup>2</sup> as well as the scarce literature on the subject,<sup>3</sup> creates a risk of building a local government system by sudden explosive electoral “rules of the game”. The article is divided into three sections. The first section of the text presents the issue of tenure in theoretical terms and previous research. The following section discusses research methods and source materials and defines the research area. The next part of the paper presents the results of local government elections and their variation between 2002 and 2018. The article concludes with conclusions and recommendations.

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<sup>2</sup> It is worth mentioning that state institutions, including, among other things, the Central Statistical Office or the State Election Commission do not have such statistics. This is most likely because in 1990–1998 the mayor (respectively the others) was elected by the municipal council. The State Election Commission only has information from municipal council elections. Only after the introduction of direct elections for the function above in 2002 did the State Election Commission start collecting information on the results of local government elections for individual territorial units.

<sup>3</sup> Recently, an analysis of the phenomenon of executive re-election (often in the largest cities in Poland) has been undertaken in the Polish literature, e.g. Gałuszka (2016), Grabowski (2016), Drzonek (2013).



## 2. Tenure in theoretical terms and research to date

In 2002, a significant change took place in Polish local government law (Act 2002), transforming the hitherto collegial executive body (the board presided over by the mayor, mayor of the city, and president of the city) into a monocratic body directly elected by the local community (Budzisz 2016). The key objective of this change was to stabilise power in the municipality by strengthening the position of the executive in the decision-making and controlling body (Kowalik 2015). As written: “This is not about cosmetic changes, but a radical reform of the local government system. The actual authority of the municipality ceases to be a representative body, and this is when an individual replaces the council and f with a social mandate – the mayor, mayor of the city, president of the city. The mayor is in charge of governing, and the council is in charge of the parade” (Grabniak 1997: 6).

Before the 2018 amendment, local government elections had been held in Poland at regular four-year intervals since 1990, and there were no additional restrictions on the number of terms in office. After the expiry of one term, the executive could seek re-election as long as he or she was interested in standing for election and as long as he or she had voter approval if there were no circumstances excluding his or her right to stand for election. However, 2018 saw another significant change to the local government system, restricting the same person from holding the mayor’s office for several consecutive terms (Act 2018). This change aimed to create the legal possibility of replacing one mayor with another – not only in the event of death or a natural circumstance forcing the removal of a mandate but also by setting a limit on the exercise of power in advance.

Regularly recurring municipal elections allow for a cyclical exchange of political elites, as they ensure the election of a representative body for a certain period only, at the end of which the candidates are re-elected. The content of the principle of tenure consists of two essential elements, the first of which concerns the institutional sphere, the establishment of an upper time horizon for the mayor’s tenure. Therefore, the period of office must be known before the start of the term of office so that the executive is aware of the term of office it is dealing with. The second aspect of the tenure principle is related to the personal dimension of the term of office of the directly elected local authority. From this perspective, the term of office creates a certain minimum of guarantee value, as the fixed term of office protects the permanence of the functioning of the executive body. However, this does not mean absolute immutability of power during the term of office, as the law must regulate situations in which the continuation of power by the incumbent mayor (mayor of the city, president of the city) is undesirable or impossible (Łukowiak 2020).

In the literature, opinions on changing the regulations related to the tenure of the executive in municipalities are divided. The discussion of the proponents of both views – for and against limiting the number of terms of office of the mayor – abounds with serious and convincing arguments from both sides. Table 1

summarises the most common arguments against limiting the number of terms of office and the arguments that favour limiting term limits.

**Table 1.** The main arguments of opponents and supporters of term limits

<b>Arguments against limiting the number of terms of office</b>	<b>Arguments in favour of limiting the number of terms of office</b>
1	2
<ul style="list-style-type: none"> <li>• ensuring the stability of the composition of the body over more than two terms ensures continuity in the operation of local government</li> <li>• The local community has the opportunity to vote for a candidate who has proved himself or herself in the position held so far</li> <li>• removing the possibility of further “cooperation” with a multcadence mayor is the effect of limiting self-government by depriving the local community of the right to decide its affairs</li> <li>• allowing the mayor to hold office for an unlimited number of terms is a sign of respect for freedom and democracy</li> <li>• limiting the number of terms of office of an elected body entails high costs, including the introduction of new people to the bodies who need time to familiarise themselves with the function to be performed</li> <li>• undesirable risks (e.g. pathological and corrupt phenomena) in municipalities can be generated by far more severe factors than a limited number of terms of office (e.g. inefficient administrative apparatus, overregulated legal system)</li> <li>• the problem of an incompetent mayor can be solved by other institutions (inspection and investigation bodies and procedures, possibility to choose another candidate during the elections or to dismiss him/her by referendum)</li> <li>• long-standing support from the local community enables the mayor to be more proactive in planning a long-term action plan, setting goals and directions for the development of the municipality</li> <li>• the restriction on the number of terms of office constitutes a restriction on the right to stand for election</li> </ul>	<ul style="list-style-type: none"> <li>• increasing citizen participation in the process of electing, operating and controlling activities in the municipality</li> <li>• a multcadence mayor has an advantage over new potential candidates in all kinds of areas of the municipality’s functioning, including long-standing social networks and relations – there is the effect of voting by neighbours and friends, the so-called official caste around the mayor, which in practice blocks access to power for those outside the informal interest group</li> <li>• preventing the concentration of power in the hands of one person over a long period</li> <li>• unlimited multcandidate leads to the strengthening of manifestations of “negative democracy”, which creates conditions for the desire to hold recall referendums but also for the exchange of power, which is only possible if a stronger candidate than the incumbent emerges</li> <li>• ensuring systematic generational renewal, as the group of people who built this self-government and created its institutions is gradually ageing and does not allow the younger generation to come to power</li> <li>• unrestricted multcandidate leads to an increase in self-confidence and consequently leads to the phenomenon of power erosion – a decrease in the rationality of managerial decisions, as well as a reduction of the will to implement them</li> <li>• limiting the number of terms of office is not a problem in planning their future working life, as some mayors resign from office, doing so consciously, believing that their predispositions predispose them to political office at higher levels of government</li> </ul>

**Table 1** (cont.)

1	2
<ul style="list-style-type: none"> <li>• the desire to be elected during municipal elections is a significant sacrifice on the part of the candidates for the office of mayor (as opposed to the election of councillors), as they have to be professionally involved in the management of the municipality for the duration of their term of office</li> <li>• the frequent re-election of existing municipal leaders is the result of decisions made by the local community themselves, as people are more likely to vote when they see reasons for their own (electoral) intervention</li> </ul>	<ul style="list-style-type: none"> <li>• term limits increase competitiveness in the political arena, ensuring that election promises are kept, whereas, in the case of multicadence mayors, this often leads to severe municipal debt</li> <li>• the two-term limit will ensure variability in local politics and affect the effectiveness of the mayor's work</li> </ul>

Source: own elaboration based on, among others: Składowski (2019), Skotnicki (2018), Sitek (2016), Kowalik (2016), Bujny and Ziemiński (2015), Kowalik (2015), Żurek (2012).

On the assumption that at the heart of the mayor's multicandidacy<sup>4</sup> (mayors of the city, presidents of the city) is the satisfaction of voters resulting from fulfilling their expectations, it should be borne in mind that these expectations vary from one local government unit to another. After all, each municipality is a complex system, with complicated relations between many individual and collective actors guided by rational information processing during local government elections. An executive body oriented towards maintaining the continuity of its authority faces the challenge of accurately identifying and understanding the needs of the municipality's residents, i.e. matching the style of governance in the municipality to the residents' expectations (Nijander-Dudzińska 2016). Conversely, voters are assured of a free decision between candidates vying for their votes, resulting in possible re-election. Governors can reduce the risk of losing power by limiting the degree to which they compete to influence the shape of citizens' decisions. This is due to actions carried out by candidates who "dilute" the electoral message to increase the likelihood of victory. In this case, voters' decisions are based on perceptions and beliefs rather than rational analysis (Wojtasik 2016). Local elections, including voting, are thus treated as a means to achieve the voter's goals, and the desire to accomplish these goals mobilises the voter to participate in elections. In the case of candidates, it is to be assumed that they are only motivated by the pursuit of power and then by maintaining and exercising power or taking responsibility for it. When vying for the undecided votes in an election campaign, they often change their programmes to make them more effective and closer to the citizens to win additional votes or even eliminate their opponents. The issue becomes whether

<sup>4</sup> The term "multi-term mayor" is used interchangeably with a term known from the literature as "perpetual mayor" – that is a person who has been elected in direct local elections at least three times in a row (i.e. double re-election).

voters can count on reliable information from the candidates, treating such news as an instrument to economise on political decision-making (Ward 2006). In the case of voters, we can speak of the existence of at least three groups, one of which is the faithful electorate of the current mayor of the municipality, the second is the opponents and voters of the counter-candidates, and the third is the voters who are undecided about whom they will vote for, discouraged, not interested in elections or politics at all, and those who declare that they will not participate in the elections. It is worth pointing out that the latter group usually constitutes the majority of those eligible to vote, so the current municipal executive must send completely different but targeted messages to this group to secure re-election. Through such microtargeting, a multicadence mayor can influence the election results, as his loyal electorate may be convinced that he has no one to lose the election to. Voters will not feel the need to participate out of sheer laziness, which may result in the absence of these voters at the ballot box, ensuring the success of the counter-candidates (Stępowski 2018).

In 2002, there was a move away from the election of the executive body of the local government in its basic organisational units by the municipal/city council. The principle of direct election of the above body by the voters was introduced. While in the elections of 1990, 1994 and 1998, it was the councillors who decided on the structure of the local government executive, since 1990 (thus already eight times), there could be an alternation in the position of a mayor by one person, as the 2002 legislation ensured the re-election of the previous mayor. The maximum number of terms of office of a local government body depends on the time censorship is adopted. The process for the election of mayors in rural municipalities, especially aspects of social behaviour, including electoral decisions, often results in the re-election of incumbent mayors. The new election rules affect democracy locally. Thus, the phenomenon of multicadence among mayors in the years under study provides a complete illustration. Until the 2006 elections, there could be only one term (2002–2006), until 2010 two terms (2002–2006, 2006–2010), until 2014 three terms (2002–2006, 2006–2010, 2010–2014), until 2018 four terms (2002–2006, 2006–2010, 2010–2014, 2014–2018), and until 2023 five terms (the last term extended by one year).

### **3. Research methods and data sources**

The study was conducted in two dimensions: spatial, i.e. data for municipalities as basic units of local government, and temporal, taking into account local government elections in 2002, 2006, 2010, 2014 and 2018. The spatial scope was limited to those territorial units in which the position of the executive body is critical, i.e. rural municipalities. The area of the study was limited to Łódź voivodeship, which was dictated by the regionally specific large number of candidates for mayor

registered in this voivodeship (465 persons) in the year adopted as the starting point for the study (2002) and a significant decrease in this number over the 16 years to 322 persons.<sup>5</sup> In addition, the municipalities of this voivodeship are among the top three voivodeships (after Mazowieckie and Lubelskie voivodeships) where the number of registered candidates for mayor exceeds 300. The voter turnout in local elections in 2002, 2006 and 2010 was lower in Łódź voivodeship than at the national level. In contrast, it changed in 2014 and 2018. In the 2014 elections, the Łódź voivodeship ranked 6<sup>th</sup> in voter turnout compared to other voivodeships, and in 2018, it ranked 2<sup>nd</sup>, with a result of 57.02% in the first round and 49.31% in the second round.<sup>6</sup> The voter turnout was higher only in the Mazowieckie voivodeship (60.93%). It can be presumed that the election of local government representatives has a significant and direct impact on the lives of voters, which results in a willingness to nominate candidates for the position of mayor. Moreover, it can be inferred that in the voivodeships mentioned above (including Łódź voivodeship), citizens' awareness of their actual impact on shaping local politics is relatively greater.

**Table 2.** Local voter turnout in the years 2002–2018 in Łódzkie voivodeship

Specification	Election result 2002		Election result 2006		Election result 2010		Election result 2014		Election result 2018	
	I round	II round	I round	II round	I round	II round	I round	II round	I round	II round
<b>Łódź voivodeship</b>	41.76%	32.84%	45.69%	35.46%	46.53%	30.46%	48.10%	43.02%	57.02%	49.31%

Source: own compilation based on data from the State Election Commission, <https://www.pkw.gov.pl> (accessed: 2.02.2023).

The time covered 2002–2018 and was based on analysing the results of those elections in which the mandate of power comes directly from the local community. The study was based on local government election results made available by the State Election Commission (PKW). On their basis, a database containing information on 665 personal victories in 133 territorial units in Łódzkie voivodeship was compiled. The final result of the work was the presentation of multicadence mayors currently

<sup>5</sup> In 2018, a total of 322 candidates ran for the office of mayor in the rural municipalities of the Łódź voivodeship, of which 106 candidates were elected in the first round of elections (an average of 2.4 candidates for the position of the executive body in the municipality). In 19 municipalities, only one candidate came forward (8 more municipalities than in 2002). In the eighth term of municipal government (2018–2023), there were fewer changes to the mayor's office than four years earlier – there were 37 changes instead of 43.

<sup>6</sup> This was one of the highest results recorded since the introduction of direct election of the municipal executive (i.e. since 2002). A general improvement in voter turnout can be seen between 2002 and 2018. The last municipal elections, in particular, were exceptional in this respect. Nationally and in almost all voivodeships, the voter turnout exceeded 50.00% (this did not happen only in the Opolskie voivodeship).

managing the municipality. For the work, their tenure is counted from the last surveyed elections, 2018 to 2002.

The results obtained were presented in the form of tables and also using cartograms. This method ensured that a large amount of information was conveyed to avoid illegibility (Dębowska, Korycka-Skorupa 2010). The use of geographic information system (GIS) data and QGIS software ensured that the spatial distribution of the described phenomenon was presented along with the spatial relationships between individual objects (Zych 2014).

#### 4. Results of the analyses

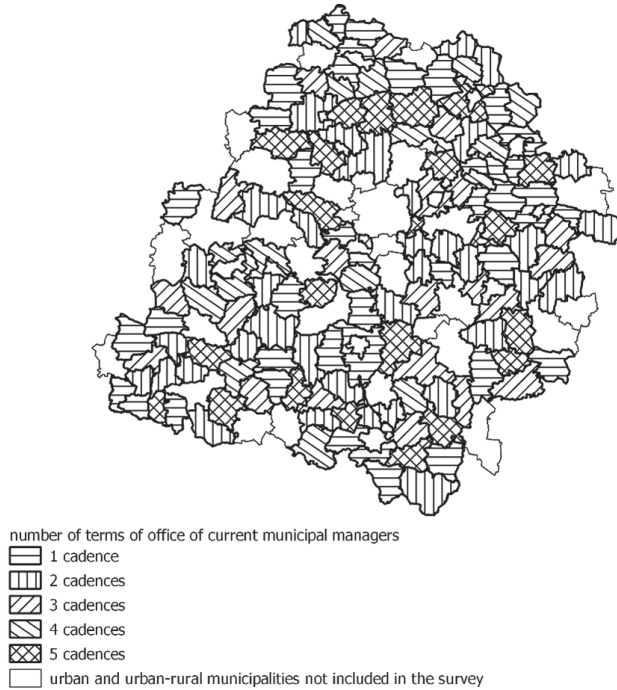
From 2002–2018, the distribution and diversity of mayoral re-elections in rural municipalities in Łódź voivodship was relatively stable. During the period under study, one could not perceive a trend towards increasing divergence in the municipalities mentioned above. The analysis of the winners elected in the executive elections between 2002 and 2018 presents a picture whose main feature is a more significant number of continuations than changes. In most municipalities, the mayor's election already occurred in the first round of elections. In 2006 and 2010, municipalities where the incumbent mayor was re-elected accounted for 71% of all the territorial units analysed. In 2014, the percentage was 68%; in 2018, the same person became mayor in 72% of the localities surveyed.

**Table 3.** Changes in local government elections to the executive body between 2002 and 2018 in rural municipalities in Łódź voivodship

Specification	Election result 2002		Election result 2006		Election result 2010		Election result 2014		Election result 2018	
<b>Rural municipalities in Łódź voivodship</b>	number of candidates		number of candidates		number of candidates		number of candidates		number of candidates	
	2461		2415		2406		2374		2340	
	% of elected mayors in:		% of elected mayors in:		% of elected mayors in:		% of elected mayors in:		% of elected mayors in:	
	I round	II round	I round	II round	I round	II round	I round	II round	I round	II round
	62	38	72	28	76	24	76	24	80	20
% dominance of incumbents		% dominance of incumbents		% dominance of incumbents		% dominance of incumbents		% dominance of incumbents		
x		71		71		68		72		

Source: own compilation based on data from the State Election Commission, <https://www.pkw.gov.pl> (accessed: 2.02.2023).

A review of the data below shows that local politics in the rural municipalities of Łódź voivodeship is characterised by multicadency (Figure 1).



**Figure 1.** Number of terms of office of current municipal managers

Source: own compilation based on data from the State Election Commission, <https://www.pkw.gov.pl> (accessed: 2.02.2023).

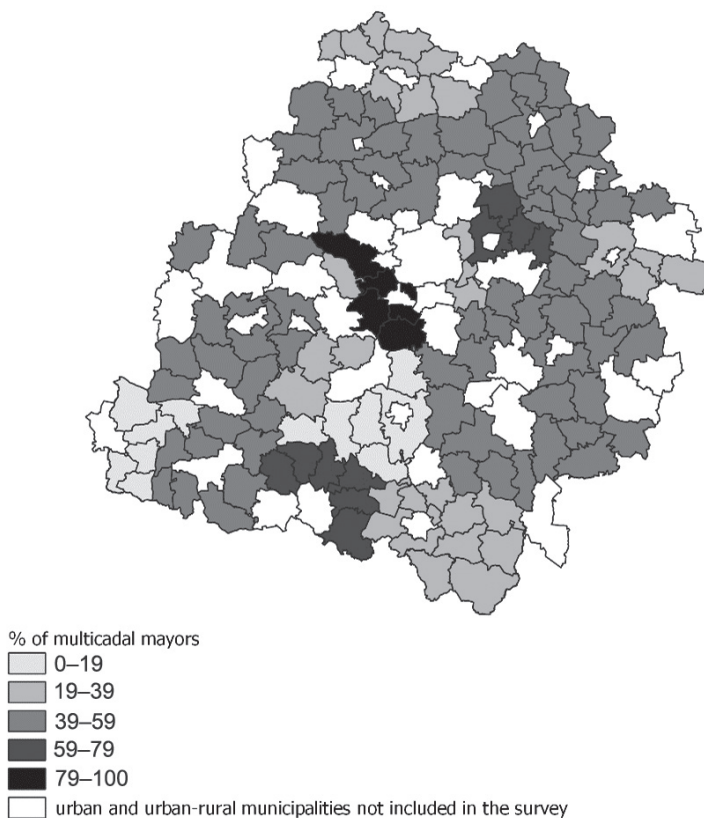
Of the 133 municipalities with rural status at the last local elections, as many as 59 are managed by multicadence mayors.<sup>7</sup> In 23 cases, the same person won the next five elections. It should be noted, however, that some mayors have been in office for longer, that is, before 2002, when direct elections to the post did not exist. In contrast, 15 mayors have been in office for four terms (from 2006 to 2023), while another 21 have been in office for three terms (2010–2023). The 2018 local government elections did not fundamentally change the staff pool of Łódź mayors but strengthened their (already strong) position.

<sup>7</sup> Out of 59 multicadence mayors in 2018, there was a monopoly in the electoral market in 14 cases. Among the multicandidate mayors, re-election in non-primary elections was always a formality. In a further 32 cases, there was trace competition in the local electoral ‘markets’ – the number of candidates in the elections was only one more than the number of seats that could be won. A multicadence mayor was successful in the remaining municipalities, defeating three or four of the counter candidate.

**Table 4.** Percentage of mayors by number of terms of continuous office between 2002 and 2018

Specification	1 cadence	2 cadences	3 cadences	4 cadences	5 cadences	Total
<b>until the 2006 elections</b>	29% n = 39	71% n = 94	not applicable	not applicable	not applicable	100% n = 133
<b>until the 2010 elections</b>	29% n = 39	25% n = 33	46% n = 61	not applicable	not applicable	100% n = 133
<b>until the 2014 elections</b>	32% n = 43	24% n = 32	17% n = 22	27% n = 36	not applicable	100% n = 133
<b>until the 2018 elections</b>	28% n = 37	28% n = 37	16% n = 21	11% n = 15	17% n = 23	100% n = 133

Source: own compilation based on data from the State Election Commission, <https://www.pkw.gov.pl> (accessed: 2.02.2023).



**Figure 2.** Percentage of multicadral mayors

Source: own compilation based on data from the State Election Commission, <https://www.pkw.gov.pl> (accessed: 2.02.2023).



The following table shows how the ratio of multicadence mayors (from 2002 to 2018 backwards) to all mayors from a given district is in the individual rural municipalities of the Łódź voivodeship.<sup>8</sup> The average ratio is 45%. The lowest result (below 20%) was recorded in the districts of Wieruszów (17%) and Bełchatów (0%). The highest percentage (above 60%) of multicadence mayors concerning all mayors from a given district occurred in the following districts: Pajęczański (67%), Brzeziński (75%) and Pabianicki (80%). This shows that despite the universality of the phenomenon of multicadency in the entire voivodeship, there are visible local correlations between the place of election and the holding of the office of “perpetual mayor”.

## 5. Summary

The article’s focal point was the issues related to the term of office and the arguments of opponents and supporters of term limits. Some understand the considerable stability of local government as a factor favouring institutional efficiency and professionalism in governance; others, it is sometimes presented as a threat to local democracy. Over time, the long tenure of one person in a central position in local government can take on the characteristics of oligarchic power. Many short- and long-term consequences of this phenomenon are pointed out, the most important of which is a gradual narrowing of the group of people with influence over decisions, a decrease in the effectiveness of power control mechanisms or susceptibility to power erosion phenomena – a decrease in the rationality of managerial decisions, as well as the ability to hierarchise and delegate tasks within the authority. Over the years, there may also be a threat of routine in municipal management, in which there is a lack of openness and readiness for continuous change and improvement on the part of the authority (Krukowska 2018).

Analysis of voter turnout data in Łódź voivodeship provides some interesting conclusions. Firstly, one of the highest results recorded since the introduction of direct election of the executive body was recorded in the last local elections. Secondly, political activity (voter turnout) is related to the size of the municipality. Higher voter turnout (above 70%) is much more common in smaller municipalities (less than 6,000 inhabitants). This is assumed to imply a greater interest on the part of voters in the authorities’ activities, which, in the case of a high voter turnout, indicates a high degree of legitimacy of the authorities (Piwowarski 2017). Therefore, it is recommended that measures be taken to raise the awareness of residents in the study area about political activity and undertake educational activities about the fact

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<sup>8</sup> As an example, Pabianice district includes five rural municipalities, and as many as 4 of them (Lutomiersk, Dłutów, Dobroń, Ksawerów) are municipalities in which the phenomenon of multicadency occurs among local government representatives. Thus, the percentage of multicadence mayors in relation to all the mayors in the district is 80%.

that every single vote thrown into the ballot box is essential for democratic codecision. Consideration should be given to the broader involvement of residents in municipal affairs in larger territorial units, where the costs of obtaining information about candidates for executive office are higher. This is because there are more frequent personal meetings with residents in a smaller municipality, and the candidate is more likely to win.

The number of rural municipalities in a given county does not influence the number of re-elections. Therefore, measures should be taken to raise awareness and knowledge of politics and governance mechanisms among the local community of Łódź voivodeship. It would be advisable to conduct a broad information policy to increase the local community's interest in what concerns them by living in the territory of a particular municipality. The decision on who to elect as mayor should, therefore, be taken based on an in-depth analysis supported by knowledge of local politics and the scope of competencies of the various local government bodies rather than based on, for example, image issues. However, it needs to be remembered that being in power for several terms of office does not always ensure victory in the first round of voting. In addition, the number of counter-candidates may influence the election results, as each successive counter-candidate reduces, in a way, the support among the remaining candidates. Such a tendency can be observed, e.g. in 2018, where changes of executive power are often due to a higher number of counter-candidates, and it was only possible to win in the second round of elections (for example, municipalities Łanięta, Pabianice, Radomsko).

Among multicadence mayors, the number of counter-candidates in local elections is low, which may indicate their relatively strong position compared to the others. Among the arguments that favour limiting the number of terms of office, there are voices in favour of limiting the "no-reflection" vote, as the numerous connections and colligations ensure the advantage of the multicadence mayors over other candidates. It is worth emphasising that the way to have increasingly powerful yet politically aware mayors lies not in formally limiting the possibility of re-candidacy but instead in caring for civic education, resulting in stronger competition on local political stages and more effective mechanisms of social control of power (Swianiewicz, Krukowska 2018). Nonetheless, changes in persons performing the roles of mayors in rural municipalities in Łódzkie voivodeship are rare and amount to approximately 30%. It seems reasonable to assume that voting for the mayor in power or their counter-candidate is not only a result of perceptions (less often knowledge) of their successes (e.g. in the implementation of investments, especially in infrastructure), their programmes, party affiliation but also a consequence of contemporary political conservatism (which is understood as attachment and aversion to change) among voters. The perception of voters will tend to be oriented towards those seeking re-election, and the municipality's population moderates the strength of this fixation in municipal executive elections (Bartnicki 2017). Therefore, developing and implementing educational activities that reduce the knowledge deficit about the processes taking place on the local

political scene (especially in the context of term limits and the consequences of unreflective behaviour – often unconsidered electoral decisions) becomes essential.

It is also only possible to mention specific weaknesses in the analysis, which may have affected the results. Firstly, it is impossible to assess whether the number of rotations in the posts of mayors is good or bad. Each case is different, and a separate analysis of such cases needs to be made to get a complete picture of the phenomenon of multi-tenure in the local political system. This issue is still worth studying, especially in rural areas in Poland, which is still waiting for a clear answer confirmed by empirical research. Thus, interpreting the obtained results could be much more in-depth and reliable if additional research was conducted. Due to the limited framework of the study, it concerned only the Łódź voivodeship. Studies of this kind may serve as a starting point for similar analyses conducted for all the voivodeships in 2002–2018. Other cognitively valuable directions for further analyses may include opinion polls conducted among the local community, which would provide knowledge on the motives for participating in local government elections and election decisions. It seems reasonable to carry out surveys among the executive of the selected municipalities – in terms of the length of time in office, additionally showing their involvement in the municipality's development. This would make it possible to find out their perspective and enrich the general knowledge in limiting local authorities' term of office. It is worth noting that obtaining and organising such data is labour-intensive, but the results would be purposeful and valuable (e.g. they could ensure the popularisation of local government election results). Thus, carrying out such an analysis will ensure the creation of an overall picture of the re-election of mayors in direct elections and will also allow us to move away from purely speculative snapshots. Therefore, the research is planned to continue using advanced methods and techniques. I hope the research will be a valuable source of information for local authorities responsible for the development and success of individual territorial units and their residents.

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## BADANIE SPOŁECZNOŚCI INTERNETOWYCH: NOWE WYZWANIA DLA BADACZA

**Abstrakt.** Artykuł stanowi głos w dyskusji na temat badań prowadzonych w społecznościach internetowych przez badaczy społecznych. Składa się z trzech części. Po wprowadzeniu autor wskazuje na istotne cechy, które określają te społeczności oraz wskazuje na typy wyróżnione przez innych badaczy, porządkując dotychczasową refleksję o charakterze metodologicznym. Społeczności wirtualne, czyli takie, w których ludzie spotykają się w cyberprzestrzeni i komunikują na tyle długo, aby poznać i stworzyć trwałe relacje w momencie, gdy staje się obiektem eksploracji empirycznej, wymaga wykorzystania określonych metod i technik badawczych. Problem podejmowany w drugiej – najbardziej obszernej części opracowania, dotyczy wykorzystania klasycznych metod obserwacji rzeczywistości społecznej podczas badań nad społecznościami internetowymi. Ostatnia, trzecia część to próba naświetlenia problemów i wyzwań, jakie stoją przed badaczami wobec cyfryzacji życia społecznego. Wśród zidentyfikowanych znalazł się dostęp do danych, które mają charakter cyfrowy, a jedną z istotniejszych umiejętności badaczy jest dotarcie do tychże.

**Słowa kluczowe:** społeczność wirtualna, społeczność internetowa, badania, obserwacja, wywiad, cyberprzestrzeń, dane

## RESEARCHING ONLINE COMMUNITIES: NEW CHALLENGES FOR THE RESEARCHER

**Abstract.** This article contributes to the discussion on research conducted in online communities by social scientists. It consists of three parts. After an introduction, the author points out the essential characteristics that define these communities and indicates the types distinguished by other researchers, organising the methodological reflection. Virtual communities, i.e. those in which people meet in cyberspace and communicate long enough to know each other and form lasting relationships when they become an object of empirical exploration, require specific research methods and techniques. The problem analysed in the second – the most comprehensive – part

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of the study concerns using classical methods of observing social reality when researching online communities. The third part highlights the challenges researchers face with the digitisation of social life. Among those identified was access to digital data, and one of the most essential skills of researchers is to reach these data.

**Keywords:** virtual community, online community, research, observation, interview, cyberspace, data

## 1. Wprowadzenie: pomiędzy społecznością wirtualną a internetową

W połowie 2023 roku dostęp do Internetu miało 64,4 proc. światowej populacji, co oznacza, że 5,16 miliarda osób korzysta z globalnej sieci (Global Digital Report 2023). Dynamika rozwoju medium (w 2018 roku liczba użytkowników Internetu przekroczyła 4 miliardy), okres pandemii koronawirusa, gdy nastąpiła dyfuzja kolejnych sfer funkcjonowania człowieka do cyberprzestrzeni sprawia, że społeczności wirtualne (ang. *virtual community*) stały się immanentnym elementem życia człowieka. Pojęcia *virtual community* po raz pierwszy prawdopodobnie użył i zdefiniował Howard Rheingold. W swojej pracy opisywał on społeczność „The WELL” (org. *The Whole Earth’ Lectronic Link*), którą osobiście animował i której był członkiem. Wskazał on, że społeczność wirtualną stanowi skupisko społeczne, które funkcjonuje w przestrzeni wirtualnej, kiedy wystarczająco dużo osób prowadzi publiczne dyskusje na tyle długo, aby wytworzyły się między nimi relacje osobiste (Rheingold 1993: 3). Takie rozumienie terminu *virtual community* jest najbardziej pierwotne i stanowi punkt wyjścia dla autorów opisujących społeczności, które funkcjonują w przestrzeni wirtualnej. Rozwój technologiczny i uspołecznienie Internetu sprawiają, że kolejni badacze proponowali własne terminy dla opisu obserwowanej rzeczywistości. Na podstawie ich prac wykształciły się między innymi: *e-community*, *online community*, *cyber communities*, czy *digital communities*. Semantycznie również w języku polskim zaproponowano kilka terminów bliskoznacznych – często stosowanych zamiennie, takich jak: społeczność wirtualna, społeczność internetowa, wirtualna wspólnota, wspólnota internetowa.

Na potrzeby poniższego artykułu przyjęto jako wiodący i najbardziej precyzyjnie oddający istotę opisywanego zjawiska termin społeczność internetowa, która stanowi podtyp społeczności wirtualnej. W ocenie autora rzeczywistość wirtualna – na przykład w symulatorach gier *offline*, może być generowana bez wykorzystania Internetu. Należy zatem zauważyć i podkreślić, że nie każdy typ społeczności wirtualnej wymaga pośrednictwa Internetu. Warunkiem *sine qua non* istnienia społeczności internetowej jest wykorzystanie tego medium. Członkowie społeczności dzięki Internetowi komunikują się między sobą i spotykają w cyberprzestrzeni na tyle długo, aby się poznać i stworzyć określone relacje. Tak rozumiana społeczność stanowi zbiorowość, która kształtuje się w ramach komunikacji zapośredniczonej przez komputer lub inne urządzenie umożliwiające

komunikowanie się z wykorzystaniem Internetu (por. Szpunar 2004; Jurek 2013: 91). W perspektywie socjologicznej – niezależnie czy mowa jest o wspólnocie online, wirtualnej, komputerowo zapośredniczonej czy cyberplemieniu, kluczowa jest interakcja wirtualna pomiędzy członkami wspólnoty (Pałasz 2022: 141). Niekiedy – oprócz wskazania wspólnotowości i medium komunikacji, autorzy podkreślają, że społeczność wirtualna funkcjonuje w sposób niezależny od takich czynników jak: miejsce zamieszkania, rasa, wiek czy płeć (por. Ridings i in. 2002).

Niezależnie od przyjętej perspektywy rozwój społeczności, które nie są ze sobą powiązane geograficznie, a funkcjonują wyłącznie w środowisku cyfrowym, tworzy dla badacza społeczne otwartą przestrzeń do eksploracji empirycznej. Stąd też dynamiczny rozwój nowych podejść w badaniu społeczności wirtualnych. W pierwszych latach – gdy badacze społeczni dopiero poznawali przestrzeń wirtualną, najbardziej popularne podejście stanowiła „netnografia”, czyli etnografia wirtualna (por. Jemielniak 2013, 2019). Z czasem jednak coraz bardziej odważnie adoptowano klasyczne metody badawcze w pomiarach internetowych, dostosowując je przy tym do wymogów nowej przestrzeni badawczej. Poniższy artykuł stanowi głos w dyskusji na temat badań prowadzonych w tychże społecznościach, porządkując dotychczasową refleksję o charakterze metodologicznym. Fakultatywnie może stanowić materiał dydaktyczny dla kształcenia w zakresie socjologii Internetu lub dyscyplinach pokrewnych. W artykule w pierwszej części wskazano na rozumienie terminu społeczność wirtualna. Zdefiniowano także cechy konieczne dla funkcjonowania wspólnoty internetowej. Druga część opracowania to zbiór metod badawczych powszechnych dla badań społecznych, które można z powodzeniem wykorzystywać, prowadząc eksplorację empiryczną. W ten sposób uzyskana zostanie odpowiedź na pytanie – *jakie, klasyczne dla nauk społecznych metody badań, mogą być stosowane w eksploracji i refleksji naukowej nad społecznościami wirtualnymi?* Rozszerzeniem powyżej sformułowanego jest rozstrzygnięcie problemu natury ontologicznej, to jest: *w jakim stopniu społeczność Internetu można badać, wykorzystując znane metody obserwacji rzeczywistości społecznej, a w jakim stopniu wymagają one modyfikacji i dostosowania do rzeczywistości wirtualnej?* Zakończenie natomiast zawiera uwagi końcowe o badaniach społecznych prowadzonych w cyberprzestrzeni ze szczególnym naciskiem na wyzwania i problemy związane z kierunkami dalszej eksploracji. Aby uporządkować siatkę pojęciową, którą zawiera artykuł, niezbędne jest na etapie wprowadzenia wskazanie różnic pomiędzy kilkoma pojęciami z zakresu badań internetowych, to jest: badania przez Internet, badania w Internecie, badania za pomocą Internetu, badania internetowe, badania o Internecie. Spośród wymienionych powyżej najszerszą kategorię stanowią badania w Internecie. Obejmują one każdy typ obserwacji, który jest prowadzony przez badacza w przestrzeni wirtualnej. W ujęciu gradacyjnym kolejne z wymienionych pojęć to badania prowadzone przez Internet, który w tym przypadku stanowi medium pośredniczące w akcie komunikacji pomiędzy podmiotami. Badanie Internetu oznaczać z kolei będzie eksplorację zjawisk związanych



z Internetem jako przestrzenią komunikacji i działania. W centrum zainteresowania badacza będzie zatem cyberprzestrzeń, a analizie podlegać będzie jej całościowe spectrum – poczynając od wymiaru społecznego, a kończąc na zagadnieniach informatycznych i technicznych (Mider 2013: 27–29; Mincewicz 2021: 166–167).

## 2. Cechy oraz typy społeczności wirtualnych

Wraz z wytworzeniem się pierwszych społeczności wirtualnych kolejni badacze starali się wyodrębnić cechy, które mogłyby je opisać. Jako jeden z pierwszych próbę nazwania tego, co wyróżnia społeczność wirtualną podjął Mark Smith (1992). Zaproponował grupę „pięciu A”, zestawiając społeczności wirtualne z tymi obserwowanymi w świecie fizycznym. Jako cechy konstytutywne wyróżnił: (1) aprzestrzenność (brak ograniczeń geograficznych oraz terytorialnych); (2) asynchroniczność (komunikaty przetwarzane z opóźnieniem, bez rygoru czasowego); (3) acielesność (komunikacja wyłącznie w formie tekstowej, bez znaczenia pozostają gesty, ubiór, mimika głosu); (4) astygmatyczność (brak stygmatyzacji ze względu na rasę, płeć, wygląd); (5) anonimowość (kontakt wyłącznie z awatarem) (za: Szpunar 2004: 107–108). Niezależnie od przyjętej perspektywy badawczej w ujęciu ilościowym autorzy osiągnęli *consensus*, że cechami konstytutywnymi społeczności wirtualnej są: wspólnota celów, więzi, zainteresowań oraz miejsce w przestrzeni wirtualnej. Atrybutami przynależnymi do społeczności wirtualnej są zatem w pierwszej kolejności *grupa ludzi* lub *wspólnota* rozumiana inaczej niż w tradycyjnych społecznościach, gdyż źródła tej wspólnoty tkwią w podobieństwie zainteresowań, takim samym spojrzeniu na świat, a nie w fizycznej bliskości. Po wtóre pojęcie wirtualnej społeczności rozumiane są jako miejsca, w których członkowie otrzymują możliwość rozwoju. Równie istotna jest obserwowana więź pomiędzy członkami wspólnoty, która oparta jest na celach, do których zaliczamy wymianę informacji, doświadczeń oraz budowanie relacji z innymi członkami społeczności (por. Whittaker i in. 1997; Osmólska 2021: 88–89).

Powyższą perspektywę w swoich pracach rozszerza choćby Piotr Siuda, który sygnalizuje, że aby można było określić daną grupę mianem społeczności wirtualnej, musi być ona odpowiednio liczna, nie określając przy tym wymaganej liczebności. Dopiero wówczas, gdy grupa jest odpowiednio liczna, może zachodzić interakcja pomiędzy członkami. Interaktywność stanowi warunek obligatoryjny, ponieważ istotą społeczności jest, aby jej członkowie nawiązywali interakcje w sposób ciągły, a nie sporadycznie. Po wtóre, w ocenie autora, aby można było mówić o społeczności wirtualnej, konieczna jest stabilność członkostwa, to jest sytuacja, w której użytkownicy danego serwisu są jego użytkownikami, przez dłuższy czas powracają do niego. Wynikową cechą stanowi „stabilność tożsamości”, albowiem użytkownicy powinni być identyfikowani ze względu na nick, awatar lub w inny sposób. Aby istniała społeczność, konieczne jest również, żeby członkowie tejże przestrzegali jej

określonych reguł, zasad, komunikując się pomiędzy sobą wedle przyjętych norm. Jako ostatni warunek wypełniania przez daną grupę kryteriów społeczności wirtualnej wskazywana została ogólnikowość komunikacji, która wytwarza wspólnotę doświadczeń. Wiąże się to z ogólnodostępnością do treści interakcji, dopuszczając jednak możliwość prywatnej wymiany wiadomości (Siuda 2009: 29–32). Współcześnie zestaw cech określający społeczność internetową rozszerzany jest o niezależność i autonomię, dobrowolność, anonimowość, dostępność w czasie i przestrzeni, brak struktur i podziałów społecznych, brak relacji nadrzędności i podrzędności, ciągłość działania, a także otwartość (por. Jakubowski 2021: 30 i inne).

Analiza literatury przedmiotu wskazuje, że kolejni autorzy podejmują własne próby typologizacji obserwowanych społeczności i zależności horyzontalnej lub wertykalnej między nimi. W prawdopodobnie najbardziej rozpowszechnionym, a zarazem w jednym z pierwszych, za kryterium podziału przyjęto potrzeby członków. Wyróżniono w ten sposób społeczności skupione na: (1) wymianie lub sprzedaży; (2) zainteresowaniach; (3) rozrywce; (4) doświadczeniach. społeczności zainteresowań (Annstrong, Hagel 1996). Dużo bardziej rozbudowane kryterium podziału zaproponował David Kozinets, który opisał cztery typy społeczności internetowych, różnicując je pod względem intensywności relacji społecznych oraz aktywności w ramach społeczności. W pierwszym przypadku mowa jest o społecznościach o niewielkiej intensywności relacji oraz niskiej aktywności jej członków. Są to społeczności zwiedzające, przyciągające osoby nastawione głównie na rozrywkę. Drugi typ to tak zwane społeczności spajające, gdzie członkowie są ze sobą silnie związani, ale brak jest znaczącej aktywności wewnątrz. Trzeci typ społeczności wirtualnej maniacy, to znaczy osoby, które nastawione są na wymianę informacji, spostrzeżeń, ale nie pragną wzajemnego kontaktu. Czwarty typ, to społeczności internetowe, gdzie użytkownicy są ze sobą silnie związani, a dodatkowo łączą ich wspólne zainteresowania. Również w tym przypadku przykładami mogą być fora i grupy dyskusyjne (Kozinets 2010).

### 3. Badania społeczności internetowych: metody eksploracji

Na gruncie nauk społecznych – wobec rozwoju społeczności internetowych oraz rosnącego znaczenia Internetu, badacze stoją przed istotnym wyzwaniem. Zasadne jest bowiem pytanie o narzędzie eksploracji takich zbiorowości, szczególnie tych, w których bariera wejścia jest bardzo wysoka. Wykorzystując metody jakościowe i ilościowe, klasyczne dla badań społecznych należy wziąć pod uwagę, że w Internecie<sup>1</sup> nie badamy ludzi, a awatary lub boty, co wymaga zredefiniowa-

<sup>1</sup> Pojęcie Internetu potocznie używane jest w liczbie pojedynczej w odniesieniu do powierzchniowego Internetu (ang. *Clearnet*). Należy jednak zwrócić uwagę, że wyszukiwarki „klasyczne” indeksują niespełna 5 procent treści przetwarzanych przez użytkowników sieci. Wśród zasobów niewidocznych w wyszukiwarkach wymienić należy: strony www generowane dynamicznie, strony

nia najbardziej podstawowego założenia związanego z gromadzeniem materiału badawczego. Naturalnym bowiem polem dla badań socjologicznych są procesy społeczne, wytwory kultury (także internetowej), sposoby komunikowania się oraz wszelkiego rodzaju zbiorowe emanacje życia społecznego. Internet w sposób istotny zakłóca tak określoną przestrzeń, albowiem na przykład badanie języka komunikacji botów internetowych w najlepszym przypadku mogłoby prowadzić do wytwarzania artefaktów badawczych, a w rzeczywistości miałyby się z celem. Przedmiotem eksploracji bowiem w tym przypadku staje się język maszyn i wytwór sztucznej inteligencji, a nie akt komunikacji – nawet za pośrednictwem medium pośredniczącego w wykonaniu człowieka. Awatar jako graficzna cyfrowa postać, pod którą użytkownik występuje w przestrzeni wirtualnej, także w sposób istotny zaburza relację pomiędzy badanym, a badaczem. Konieczne jest także przypomnienie, że awatary w Internecie mogą być generowane w sposób dynamiczny, a ich zwielokrotnienie przez każdego z nas daje przestrzeń do poczucia anonimowości i braku kontroli społecznej.

Do uniwersum badań społecznych należy wywodząca się z nauk przyrodniczych obserwacja. Wykorzystanie obserwacji w naukach społecznych związane jest z postacią Frederica Le'a Play'a, którą łączył z prowadzeniem wywiadów skategoryzowanych i swobodnych z członkami rodzin robotniczych (za Sztumski 2005: 114–115). W badaniach antropologicznych wykorzystywana była przez etnografów takich jak Bronisław Malinowski, gdy prowadził on długotrwałą obserwację wewnątrz grupy. Następnie w sposób płynny została przejęta przez badaczy z innych dyscyplin w zakresie nauk społecznych. Powyższe dwa przykłady wskazują, że obserwacja jest narzędziem i źródłem uzupełnienia danych. Jako niezależna i jedyna metoda badawcza, wykorzystywana w sposób autonomiczny, obserwacja bywa dość rzadko. Przeważnie służy lepszemu zrozumieniu badanego tematu. Z perspektywy poniższego opracowania najistotniejsze jest wykorzystanie obserwacji w badaniach etnograficznych. W tym przypadku badacz w pierwszej kolejności skoncentrowany jest na eksploracji określonego zjawiska, społeczności. Badania takie powinny być prowadzone w naturalnym środowisku badanych (Maison, Noga-Bogomilski 2007: 28–29), stąd też najbardziej właściwą metodą do prowadzenia tego typu badań jest obserwacja. Pod pojęciem obserwacji rozumieć należy celowe, ukierunkowane i zamierzone oraz systematyczne postrzeganie badanego przedmiotu, procesu, grupy lub zjawiska. Obserwacja to przede wszystkim sposób badań, który odgrywa specyficzną i istotną rolę, jednocześnie nie powodując zmian w badanym zjawisku. Posługując się obserwacją jako metodą badawczą mamy do czynienia

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zablokowane dla robota google, strony bez odnośników, zasoby wymagające uwierzytelnienia, strony napisane w językach innych niż HTML. Dopełnieniem logicznym dla zasobów *Deep Webu* jest sieć *Dark Web*, która chociaż owiana nutą tajemniczości stanowi naturalne pole eksploracji dla badacza społecznego. Tworzą się tam bowiem społeczności użytkowników, które z powodzeniem mogą stanowić obiekt eksploracji empirycznej. Współcześnie zatem możemy mówić o Internetach, a nie o Internecie, stąd w artykule przyjęto liczbę mnogą.

z subiektywnym postrzeganiem i interpretowaniem obiektywnych faktów, z czego powinien zdawać sobie sprawę każdy, kto realizuje obserwację w procesie badawczym. Szczególną rolę powyższe przymioty odgrywają w naukach społecznych, gdzie badacz powinien mieć silnie rozwiniętą umiejętność odczytywania subiektywnych znaczeń obserwowanych zachowań i ukazania obiektywnie funkcji, jakie z tymi zachowaniami łączą się w społeczeństwie (Sztumski 2005: 149–151).

Do końca XIX wieku obserwacja była główną metodą stosowaną zarówno przez przedstawicieli nauk społecznych, jak i przyrodniczych. Jest uznawana za najbardziej wszechstronną metodę zbierania danych, ponieważ są one gromadzone drogą spostrzeżeń. Współcześnie, w związku z rozwojem innych bardziej efektywnych traci swoje znaczenie, stając się metodą uzupełniającą, a niekiedy określana jest jako technika (Miller 2012: 76–97). Jeżeli świadome obserwacje organizowane są w sposób celowy, systematyczny, a uzyskane informacje gromadzi się i interpretuje jako zdarzenia lub też zjawiska oddziałujące na elementy i procesy danego systemu, czy też określonej struktury organizacyjnej, obserwacja jest wtedy wówczas metodą badawczą (Apanowicz 2000: 91). Należy podkreślić, że obserwacja jako metoda badawcza nie ogranicza się jedynie do rejestracji jednostkowych faktów, ale fakty te ujmuje we wzajemnych związkach i zależnościach, wyjaśniając i wskazując na związki przyczynowo – skutkowe. Obserwacja jako metoda badawcza zakłada wybór spostrzeżeń według określonych wcześniej warunków, a kryterium selekcji zostaje określone ze względu na cel prowadzenia obserwacji.

Internet stanowi przestrzeń do prowadzenia obserwacji w kontrolowanych warunkach, trudnych do osiągnięcia w rzeczywistości fizycznej. Obserwacja w cyberprzestrzeni skupiać się będzie na konkretnych jednostkach i nie wymaga interakcji z badanymi. W porównaniu z klasycznymi charakterystycznymi dla antropologii badaniami, obserwacja w Internecie zyskuje dwa nowe parametry – jest skwantyfikowana i może być prowadzona na całej interesującej badacza populacji, a nie tylko na jednostkach. Ta istotna przewaga rzeczywistości wirtualnej nad fizyczną sprawia, że oprócz klasycznego dla obserwacji opisu, badacz ma możliwość prowadzenia analiz o charakterze jakościowym, jak i ilościowym.

Digitalizacja informacji sprawia, że badania etnograficzne mogą być uzupełniane przez techniki komputerowego przetwarzania danych, co skutkuje nową jakością badań etnograficznych. Pierwsza propozycja implementacji dorobku etnografii do badań internetowych została podjęta przez Christine Hine (2000). Pojęciem, określającym metodę prowadzenia badań etnograficznych w Internecie była netnografia. Zaproponowana przez Roberta V. Kozinets'a metoda początkowo miała charakter pomocniczy, a badania prowadzone przy jej wykorzystaniu polegały na uzupełnianiu pozyskanych wcześniej danych (Kozinets 2010). Część badaczy uważa, że brak jest zasadniczych różnic pomiędzy klasycznymi badaniami etnograficznymi, a tymi prowadzonymi w cyberprzestrzeni. Jedyna różnica tkwi w przedmiocie badań (za Jemielniak 2013: 283). Potwierdzenie tychże słów znajdujemy w pracy przywoływanego Dariusza Jemielniaka *Życie wirtualnych*

*dzikich. Netnografia Wikipedii, największego projektu współtworzonego przez ludzi* (2013), która już w tytule nawiązuje do Bronisława Malinowskiego, a skupiona jest na społeczność wikipedystów.

Chociaż określenie netnografia idealnie oddaje istotę badań etnograficznych prowadzonych w Internecie, to została ona zaadoptowana na potrzeby badań marketingowych. Stąd też coraz powszechniejsze staje się określanie tego typu postępowania eksploracyjnego mianem: etnografii cyfrowej, etnografii wirtualnej, etnografii internetowej. Wszystkie powyższe określenia odnoszą się w praktyce do jednego – badań etnograficznych prowadzonych online. Spotykają się one niekiedy z krytyką, ale jak podkreśla C. Hine, wszystkie formy interakcji są etnograficznie prawdziwe, także te prowadzone online (Hine 2000: 65). W porównaniu z badaniem zachowań społeczności, gdzie badacz również prowadzi obserwację, przedmiotem badań etnografii cyfrowej są przekazy graficzne i tekstowe zamieszczone w Internecie (Kozinets 2010: 60). Wirtualne badania etnograficzne, oprócz klasycznych metod obserwacji oraz analizy wytworów kultury w postaci zdigitalizowanej, mogą być wspierane poprzez prowadzenie dziennika badawczego, wywiadów o różnym poziomie standaryzacji.

Badaniami jakościowymi przez Internet zaczęto interesować się już w latach 80-tych, gdy komputery stawały się coraz bardziej powszechne. W pierwszym okresie rozwoju sieci skupiano się przede wszystkim na próbie odtworzenia w Internecie klasycznych badań fokusowych. Były to badania realizowane w czasie rzeczywistym – kilku respondentów jednocześnie brało udział w sesji prowadzonej przez moderatora. Moderator miał kontakt z respondentami przez Internet i w ten sposób możliwa stawała się interakcja między moderatorem a każdym z uczestników, ale również pomiędzy wszystkimi uczestnikami. Uczestnicy w trakcie takiego badania e-fokusowego dyskutowali i wykonywali różne zadania, jak choćby wspólne realizowanie *mappingu* lub kolażu (Presz 2003). Rozwój narzędzi do komunikacji zdalnej sprawił, że możliwa stała się w społeczności internetowej realizacja wywiadów pogłębionych z istotną modyfikacją. Wykorzystując Internet jako medium pośredniczące odpowiednikiem klasycznych Indywidualnych Wywiadów Pogłębionych (ang. *Individual In-Depth Interviews*, IDI) oraz Zogniskowanych Wywiadów Grupowych (ang. *Focus Group Interview*, FGI), które mogą być przeprowadzone wyłącznie w Internecie, są ich cyfrowe odmiany – Wirtualne Indywidualne Wywiady Pogłębione (VIDI) oraz Wirtualne Zogniskowane Wywiady Grupowe (VFGI)<sup>2</sup>. Podstawową różnicą między tradycyjnymi wywiadami, a tymi prowadzonymi online, jest wykorzystanie w realizacji badania wyspecjalizowanej

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<sup>2</sup> Jak dotychczas nie została wypracowana jedna wiodąca perspektywa badawcza. Stąd też brak ujednoliconego nazewnictwa. W literaturze przedmiotu Wirtualne Zogniskowane Wywiady Grupowe oraz Wirtualne Indywidualne Wywiady Pogłębione, często używane są pojęcia takie jak: Zogniskowane Wywiady Grupowe Online, Indywidualne Wywiady Pogłębione Online; Internetowe Zogniskowane Wywiady Grupowe, Internetowe Wywiady Pogłębione Online. Istotą każdej z powyższych jest cyberprzestrzeń jako ta, w której prowadzone jest postępowanie badawcze.

– dedykowanej platformy internetowej. Wywiady, czy to indywidualne, czy też grupowe mogą przybierać różne formy. Pierwszą i najłatwiejszą organizacyjnie jest pisemna, przypominająca moderowany czat, wykorzystywana częściej przy grupowych wywiadach. Drugą, równie popularną jest transmisja, czy to wyłącznie z efektami audio, lub też z wykorzystaniem obrazu i dźwięku. Obydwie formy mają charakter synchroniczny, to znaczy, zakładają prowadzenie badania w ściśle określonym czasie. Z kolei asynchroniczny tryb, stosowany wyłącznie przy wywiadach grupowych, oznacza regularne odwiedzanie forum internetowego, gdzie odbywa się interakcja pomiędzy uczestnikami badania i moderatorem w różnym czasie (Daszkiewicz, Wrona 2014: 324–325). Nadbudowę wywiadów asynchronicznych stanowią *bulletin board* oraz market research online community, gdy paneliści wykonują zadania wyznaczone przez moderatora. Dominika Maison wskazuje, że kompromis dla wywiadów indywidualnych i grupowych stanowią diady – wywiady prowadzone jednocześnie z parą respondentów (Maison 2022: 55). Także ten typ interakcji może być realizowany w warunkach online. Mimo że wywiady prowadzone za pośrednictwem internetowych narzędzi nie zdominowały badań jakościowych, to w związku z pandemią koronawirusa wzrosło zastosowanie tychże. Próbując wskazać na ich potencjał w literaturze przedmiotu, podjęto próbę demitologizacji wykorzystania Internetu w realizacji jakościowych wywiadów online (zob. Ostaszewska, Pietrusińska 2023: 37–58). Wobec sceptycyzmu, szczególnie wśród purystów metodologicznych, powrót do dyskusji akademickiej na temat badań online w Internecie w okresie pandemicznym sprawia, że ich wykorzystanie w kolejnych latach może tylko rosnąć.

Równie pożądane, co konieczne w przypadku badań społeczności internetowych są pomiary ilościowe, realizowane na wystandaryzowanym kwestionariuszu badawczym. Do klasycznych, mających swoją ugruntowaną pozycję w literaturze, należą w pierwszej kolejności wywiady kwestionariuszowe oraz badania ankietowe. W ramach rozwoju technologicznego w praktyce badawczej rozpoczęło się stopniowe odchodzenie od klasycznych na rzecz stanowiących ich nadbudowę oraz modyfikację. Pierwszą modyfikację klasycznych *Paper and Pencil Interviews* (PAPI) oraz badań ankietowych stanowiły wywiady kwestionariuszowe wspomagane komputerowo (ang. *Computer Assisted Personal Interview*, CAPI) oraz wywiady telefoniczne wspomagane komputerowo (ang. *Computer Assisted Telephone Interviewing*, CATI). Na ich podstawie w latach 90. tych XX wieku, opracowana została technika pomiaru ankiety internetowej online – *Computer Assisted Web Interview* (CAWI). Jej intensywny rozwój nastąpił dopiero wraz z upowszechnieniem się Internetu w XXI wieku (Sowa i in. 2015: 137–138).

Poszczególne badacze prezentują wiele pomysłów związanych z typologizacją ankiet online. Trzy rozłączne kryteria podziału związane są ze: sposobem dystrybucji kwestionariusza, prezentacji pytań oraz doбором respondentów (Siuda 2016: 29). Badanie CAWI może być prowadzone na kilka różnych sposobów, jednak powszechnie stosowane są ankiety samo wypełniane. Wystandaryzowaną

ankietę można zamieścić na witrynie internetowej lub też rozesłać pocztą elektroniczną. Najpowszechniejsze jest umieszczenie kwestionariusza w dedykowanym panelu, dostępnym w zależności od doboru próby – dla wybranej grupy lub też wszystkich chętnych. CAWI, w porównaniu z innymi technikami, daje znacznie większe możliwości konstrukcji kwestionariusza, a także kontroli procesu przeprowadzenia badania (Mider 2013: 210–218). Choć technika często budzi wątpliwości natury etycznej, związane z trudnością weryfikacji poziomu wiarygodności danych, stale zyskuje na znaczeniu. Obecnie stanowi jedną z najpopularniejszych i najpowszechniejszych technik wykorzystywanych w pomiarze ilościowym<sup>3</sup>. Do niewątpliwych zalet CAWI należy możliwość zbierania przy jej wykorzystaniu informacji drażliwych. Technika zapewnia względną anonimowość respondenta. Do innych, mniej istotnych przewag, aczkolwiek ważnych, należy zaliczyć relatywnie niskie koszty prowadzenia badań, a brak zjawiska kontroli społecznej sprawia, że respondent będzie udzielał odpowiedzi bliższych stanowi faktycznemu.

Jednym z najistotniejszych problemów w momencie realizacji badania ilościowego jest rozstrzygnięcie, o liczebności próby badawczej. Na poziomie teoretycznym wyróżnić można dwa typy prób w badaniach społecznych: (1) wyczerpujące celowe realizowane w grupach zamkniętych, gdzie możliwe jest precyzyjne określenie członków społeczności oraz dotarcie do nich z narzędziem badawczym, a także (2) reprezentatywne, gdy na podstawie wyników uzyskanych w badanej grupie możemy wyciągać wnioski odnoszące się do większej populacji. Wówczas próba ma charakter losowy, a każdy członek społeczności ma dające się określić lub równe szanse wejścia w skład próby (zob. np. Zatterberg 1965: 515; Sołoma 1999: 21–24; Szreder 2010: 168–174; Matuszak i Matuszak 2011: 33–39). O ile w przypadku wywiadów indywidualnych lub grupowych to badacz samodzielnie, zgodnie z założeniem teorii ugruntowanej, określa liczebność próby i osiągnięcie stanu „nasylenia teoretycznego” realizując próbę celową, w badaniach ilościowych wątek ten wymaga rozwinięcia. Badacz w tym przypadku korzysta z próby, to znaczy części badanej populacji wyselekcjonowanej w taki sposób, aby na podstawie obserwacji można było wnioskować o cechach zbiorowości generalnej. Próba powinna mieć charakter reprezentatywny, to znaczy odwzorowywać strukturę badanej populacji w sposób możliwie precyzyjny.

Koncepcja reprezentatywnej próby badawczej związana jest z Instytutem Gallupa, który w 1948 roku w sondażu przedwyborczym w Stanach Zjednoczonych Ameryki zastosował próbę kwotową, co w sposób znaczący zniekształciło

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<sup>3</sup> Według danych Polskiego Towarzystwa Badaczy Rynki i Opinii (PTBRiO) w 2010 roku liczba wywiadów CAWI w Polsce wyniosła 18,3 proc. Od 2017 roku 50 proc. wszystkich wywiadów realizowanych jest z wykorzystaniem techniki CAWI. Znaczący wzrost nastąpił w pierwszym pandemicznym roku 2020, gdy odsetek ten wzrósł do 72,9 proc. Ostatnie dane za rok 2021 pokazują, że statystyka ta wróciła do średniej i wówczas wykorzystując CAWI wykonano 56,7 proc. ogółu wszystkich badań ilościowych. Szczegóły dostępne pod adresem: <https://insightmap.pl/rankingi/zestawienia-ogolne/>.

wynik badania (za Babbie 2003). Wówczas badacze uznali, że realizując pomiar ilościowy, konieczny jest losowy dobór jednostek z populacji. W ten sposób wykształcił się termin doboru probabilistycznego, to znaczy sytuacji, gdy możliwe jest oszacowanie prawdopodobieństwa wejścia do próby danej jednostki. W praktyce stosowane są cztery metody losowego doboru próby: prosty, systematyczny, warstwowy, grupowy (Podgórski 2007: 204–206). Z perspektywy badacza ilościowego możliwość posłużenia się probabilistyczną próbą badawczą jest najbardziej pożądaną. W społecznościach internetowych niekiedy niemożliwe może okazać się odtworzenie parametrów zbiorowości (jej liczebności), w tym podstawowych zmiennych dla badacza społecznego o charakterze społeczno-ekonomicznym. Stąd też w takim przypadku należy wykorzystać nielosową, nieprobabilistyczną próbę badawczą. W badaniach społecznych zazwyczaj wykorzystuje się trzy rodzaje prób, które zostały pobrane w sposób nielosowy, to jest: okolicznościowe, celowe i kwotowe. Próbę okolicznościową tworzą osoby łatwo dostępne, dobrane w sposób przypadkowy, spotkane na ulicy, które wyrażą zgodę na udział w badaniu. Próba celowa dobierana jest przez badacza w sposób subiektywny. Próba kwotowa z kolei jest uzyskiwana na podstawie danych wtórnych na temat badanej populacji. Wówczas dąży się do maksymalnego podobieństwa próby do populacji. Chociaż u większości badaczy panuje przekonanie, że optymalny jest losowy dobór próby, która ma charakter reprezentatywny, to w literaturze metodologicznej pojawiają się argumenty o wykorzystaniu nielosowej próby badawczej (głównie o charakterze ekonomicznym) (Frankfort-Nachmias, Nachmias 2001: 198–200). Przy ilościowych badaniach społeczności internetowych nie należy zatem za wszelką cenę dążyć do doboru probabilistycznego próby. Uzasadnione (a często konieczne) będzie wykorzystanie próby nielosowej, najczęściej celowej.

#### **4. Zakończenie: w kierunku badań 3D, wyzwania i problemy**

Rozwój potężnych zbiorów danych wirtualnych, pandemia koronawirusa nowe społeczności, przestrzeń *Metaversu*, gdzie w wirtualnym świecie 3D z wykorzystaniem technologii rzeczywistości wirtualnej (ang. *virtual reality*, VR) oraz rzeczywistości rozszerzonej (ang. *augmented reality*, AR) funkcjonują awatary ludzi, to tylko przykłady wydarzeń, które wpływają na redefinicję tradycyjnych paradygmatów w badaniach społecznych, a także kompetencji badaczy. Dla przykładu, w przypadku chęci poznania społeczności wirtualnej w metawersie konieczne stają się kompetencje, nie tylko społeczne oraz badawcze, ale także technologiczne. Co więcej, jednym z istotniejszych wyzwań w świecie cyfrowym jest umiejętność sprawnego wyszukania (dotarcia do) danych, które następnie badacz będzie potrafił przełożyć na materiał empiryczny. Zarysowana w ten sposób triada wyzwań związanych z prowadzeniem badań w środowisku cyfrowym wśród społeczności internetowych oparta jest na trzech terminach: *data*, *digital*, *deep*.



1. Najlepiej rozpoznany pojęciem w powiązaniu ze słowem *big* są *data*. Pojęcie *Big Data* nie jest jednoznaczne. W ujęciu opisowym odnosić się będzie do układu złożonego z danych o określonych właściwościach, metod przechowywania ich i przetwarzania, a także technik zaawansowanej analizy danych. Zostało rozpropagowane dzięki takim dyscypliną jak astronomia czy genetyka u progu XXI wieku. Obecnie w sposób naturalny przeniknęło do praktycznie każdego obszaru działalności człowieka, a zarazem kolejnych dyscyplin nauki, w tym nauk społecznych. Według niektórych (np. Tinati i in. 2014) *Big Data* stanowi jedno z najważniejszych wyzwań współczesnej socjologii, zarówno w wymiarze teoretycznym, jak i aplikacyjnym. Powszechnie kojarzone jest z nieustrukturyzowanymi danymi internetowymi takimi jak: sieci społecznościowe, liczba odsłon witryn internetowych, treści blogów, portali, maili, publikacji lub też zasoby i dane wytwarzane przez urzędnia. Generowane w ten sposób dane dotyczą kolejnych obszarów funkcjonowania człowieka. W 2023 roku ludzkość generuje 120 zetabajtów danych, co stanowi dwukrotny przyrost w ciągu trzech lat, albowiem w 2020 roku cała ludzkość wytworzyła nieco ponad 60 zetabajtów. W ciągu doby cała ludzkość wysłała 333 biliony e-maili, formułuje 8.5 biliona zapytań do wyszukiwarki Google<sup>4</sup>. Wytwarzamy jako ludzkość w ten sposób trudny do opisanie zasób danych o charakterze społecznym, politycznym ekonomicznym, kulturowym, technologicznym. Dla badacza społecznego istotnym wyzwaniem staje się przekształcenie owych danych w informacje, które następnie z wykorzystaniem narzędzi do analiz będą mogły być poddane szczegółowej obróbce i stanowić punkt wyjścia do prowadzenia badań.
2. Digitalizacja danych w realiach trzeciej dekady XXI wieku stała się faktem. Ścisły związek *digital* (cyfrowy) z danymi jest zatem niepodważalny. Współcześnie dane digitalizują instytucje publiczne, instytucje kultury, instytucje finansowe, funkcjonujące w szkolnictwie, czy też zwykli ludzie. Digitalizacja w praktyce oznacza przekształcenie analogowego obiektu w jego cyfrowy odpowiednik. Po wytworzeniu takowego obiekt ten umieszczany jest w przestrzeni wirtualnej. Ukształtowane w ten sposób społeczeństwo cyfrowe znajduje na dwóch biegunach nadawcę treści, który rozpowszechnia zdigitalizowany obiekt i odbiorcę poszukującego informacji. Nie będzie ono jednak funkcjonować w sposób sprawny, jeżeli nie będą uwzględniane, a następnie potrzeby użytkowników, co należy definiować w kategorii wyzwania. Twórcy i użytkownicy Internetu muszą rozumieć, że technologie wpływają na życie społeczne, ale też są kształtowane przez ludzi. Kluczowa wydaje się identyfikacja, a następnie interpretacja na podstawie analizy treści potrzeb użytkownika oraz sposobów ich zaspokajania przez twórców (np. artystów funkcjonujących w Internecie) czy instytucje (dostęp do zasobów, treści).

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<sup>4</sup> Na podstawie: <https://explodingtopics.com/blog/data-generated-per-day>.

Sama społeczność internetowa także musi być „ciekawa”, aby przyciągnąć i zainteresować, nie tylko ze względu na obszar funkcjonowania, ale także na sposób zaspokojenia wskazanych powyżej potrzeb.

3. Najmniej oczywistym i najmniej spopularyzowanym terminem spośród powyżej trzech wymienionych jest *deep*. W odniesieniu do Internetu naturalną konotacją jest powiązanie *deep* z pojęciem *web*, co jako akronim w wolnym tłumaczeniu oznaczać będzie przestrzeń głębokiego Internetu, która obejmuje około 95 proc. zasobów Internetów. Wśród badaczy Internetu termin ten doczekał się już ugruntowania oraz wypracowania definicji. Termin *Deep Web* dotyczył będzie treści, które nie są indeksowane przez wyszukiwarki powierzchniowego Internetu najczęściej z następujących powodów: zablokowania dla robotów wyszukiwarek sieciowych, nieindeksowania z braku odnośników, wymogu uwierzytelnienia (podanie nazwy użytkownika oraz hasła), użycia innych niż HTML języków programowania, lokalizacji geograficznej użytkownika uniemożliwiającej skorzystanie z niektórych treści i usług, a nawet historii wcześniejszych wyszukiwań. W zasobach głębokiego Internetu znajdują się także infrastrukturalne domeny najwyższego poziomu, alternatywne systemy nazw domen, pseudodomeny czy też usługi z zakresu Sieci 0.0. (Mider 2019: 155). Dane w postaci zdigitalizowanej wyczerpywały będą zakres powyższe rozumienie terminu *deep*, ale na potrzeby opracowania jego zakres należy rozszerzyć. Definiując bowiem wyzwania związane z badaniem społeczności internetowych czy też Internetu w ogóle konieczne jest bowiem uwzględnienie, że dane pozostają „głęboko ukryte” w zasobach Internetu. Kluczowe jest zatem wydobywanie ich, to jest posiadanie umiejętności w zakresie pozyskiwania danych z zasobów Internetu z wykorzystaniem narzędzi do zautomatyzowanego *Google Hackingu* lub też manualnego wyszukiwania.

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Odrębne parametry ontologiczne wirtualnej oraz fizycznej rzeczywistości sprawiają, że prowadzenie badań społecznych w przestrzeni wirtualnej może być istotnym wyzwaniem dla badacza. W przedstawionym powyżej opracowaniu skupiono się na metodach eksploracji społeczności internetowych. Wskazano, że w badaniach mogą być wykorzystywane klasyczne, ugruntowane w praktyce nauk społecznych metody i techniki pomiaru. Z racji, iż badania są prowadzone w cyberprzestrzeni, ze względu na odmienną rzeczywistość świata Internetu, wymagana jest ich modyfikacja i dostosowanie do warunków technicznych. Prawdopodobnie w najmniejszym stopniu modyfikacji wymagają techniki badacze służące ilościowym badaniom. CAWI jako technika badawcza oparta jest na Internecie, a wykorzystując narzędzia techniczne do realizacji w przypadku społeczności internetowych, prawdopodobnie najistotniejsze dla respondenta będzie zagwarantowanie anonimowości.


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## POMIĘDZY PROTORASIZMEM SZLACHECKIM A RASIZMEM NAUKOWYM. STUDIUM PORÓWNAWCZE PRAKTYK URASAWIANIA INNYCH NA PRZYKŁADZIE POLSKICH CHŁOPÓW PAŃSZCZYŹNIANYCH I AFROAMERYKANÓW

**Abstrakt.** Celem artykułu jest dokonanie studium porównawczego zjawisk protorasizmu szlacheckiego i nowożytnego rasizmu naukowego oraz ujęcia ich, zgodnie z funkcjonującą praktyką akademicką, w kategorii faktów społeczno-kulturowych. Autor zarysowuje charakterystykę zjawisk: polskiego protorasizmu szlacheckiego i medykalizacji pojęcia ludzkiej rasy w Stanach Zjednoczonych na przełomie XIX i XX wieku, zaprzęganęj w proces wtórnego uprzedmiotawiania nie-białej ludności. Wskazuje na pewne elementy wspólne praktyk urasawiania *Innych* zarówno w szlacheckiej Polsce, jak i oddalonej w czasie Ameryce. W tym kontekście rozpatruje rasizm jako kategorię analityczną będącą narzędziem Foucaultowskiej władzy dyskursywnej, podkreślając jej klasowy i dystynkcyjny charakter. Zwraca uwagę na przemiany, które dokonywały się w rozumieniu pojęcia rasy wraz z postępującym rozwojem oświeceniowego europejskiego ideału naukowości. Wskazuje na cechy i figury powszechnie utożsamiane z *Innymi*. Ich podobieństwo tłumaczy wspólnym rdzeniem, wywodzącym się ze wczesnego europejskiego etnocentryzmu.

**Słowa kluczowe:** rasizm, rasizm naukowy, rasa ludzka, protorasizm, dyskurs rasowy, władza dyskursywna

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## BETWEEN GENTRY PROTO-RACIALISM AND SCIENTIFIC RACISM. A COMPARATIVE STUDY OF THE PRACTICES OF OPPRESSING *OTHERS* ON THE EXAMPLE OF POLISH SERFS AND AFRICAN-AMERICANS

**Abstract.** This article aims to make a comparative study of the phenomena of gentry proto-racialism and modern scientific racism and to frame them, according to the functioning academic practice, in the category of socio-cultural facts. The author outlines the characteristics of the phenomena: Polish aristocratic proto-racism and the medicalisation of the notion of the human race in the United States at the turn of the 20<sup>th</sup> century, harnessed to the process of secondary prejudice against non-whites. She points out some common elements in the practices of racialising the Other in aristocratic Poland and America far removed in time. In this context, she considers racism as an analytical category that is a tool of Foucaultian discursive power, emphasising its class and dystopic nature. He draws attention to the transformations that took place in understanding the concept of race with the progressive development of the Enlightenment European ideal of scientism. He points out the characteristics and figures commonly identified with the Other. He explains their similarity with a common core derived from early European ethnocentrism.

**Keywords:** Racism, scientific racism, human race, proto-racialism, racial discourse, discursive power

### 1. Polski protorasizm szlachecki

Pojęcie protorasizmu, choć nie pojawia się w filozoficznej refleksji Étienne'a Balibara (1991), staje się istotną kategorią analityczną dla współczesnych badaczy społecznych inspirowanych się francuskim filozofem. Zjawisko protorasizmu odnosi się do specyficznej formy dyskryminacji, poprzedzającej tę, której autor poświęcił artykuł *Class Racism* – rasizmu klasowego. Francuski myśliciel zauważa, że przed okresem medykalizacji dyskursu rasowego, europejskie społeczeństwa wykształcały specyficzne formy naznaczania *Innych* w celu legitymizacji społecznych hierarchii. Jedną z pierwszych udanych prób posłużenia się dyskursem protorasowym w okresie Średniowiecza jest według niego chrystianizacja Żydów i Maurów przez Królestwo Hiszpanii po udanej Rekonkwiszie, z którą wiązał się m.in. zakaz mieszanych małżeństw. W tym samym czasie rozwijała się doktryna *limpieza de sangre* – czystości krwi. Dotychczasowa opcja porzucenia rodzimej wiary na rzecz chrześcijaństwa została innowiercom uniemożliwiona. Klasy panujące wychodziły z założenia, że konwertyci nigdy nie dostosują się do „prawdziwie katolickiej” większości, a ich kulturowa odmienność zaczęła ulegać esencjalizacji i naturalizacji.

Polski protorasizm szlachecki jest terminem, który pojawił się w polskiej debacie akademickiej relatywnie niedawno, dzięki dokonującemu się zwrotowi plebejskiemu (zob. Rauszer 2020; Pobłocki 2021; Leszczyński 2023). Przedrostek *proto* sygnalizuje rozróżnienie pomiędzy formą rasistowskiego systemu obowiązującą przed unaukowieniem dyskursu rasowego w XIX wieku a tą późniejszą,

wiążącą się z rozwojem pozytywistycznego wzorca nauki. Przedmiotem polskiego protorasizmu szlacheckiego padali przede wszystkim chłopci pańszczyźniani<sup>1</sup>.

Paweł Wiktor Ryś (2023) wskazuje, że tożsamość szlachecka miała charakter zarówno auto-, jak i heteroreferencyjny. Z jednej strony kształtowała się w opozycji do *zewnątrznych Innych*, takich jak Turkowie, Niemcy (Krzyżacy), Żydzi czy Rosjanie, z drugiej zaś – do *Innych wewnętrznych*, a więc warstwy plebejskiej, w skład której wchodził m.in. chłopci, a z czasem także robotnicy fabryczni. Na czym jednak polega(ło) ów urasowienie? Można posłużyć się prostą, ale adekwatną definicją Joanny Karoliny Malinowskiej (2023) – urasowieniem nazywamy procesy, w wyniku których ludzie są rozpoznawani (oraz sami się identyfikują) jako należący do określonej rasy. Jednym z głównych celów urasowienia jest wytworzenie lub podkreślenie występujących już różnic pomiędzy przedstawicielami dwóch lub więcej grup, służącemu (re)produkowaniu hierarchii społecznej. W okresie protorasizmu szlacheckiego elementem mającym wskazywać na swego rodzaju odmienność gatunkową pomiędzy szlachcicami a chłopami były ulegające esencjalizacji różnice kulturowe – zostaną one omówione w dalszej części tekstu.

Zjawisko urasowienia u swego zarania miało charakter klasowy i podyktowane było relacjami władzy. Władza dyskursywna w ujęciu Michele’a Foucaulta (1970) polega bowiem na możliwości narzucania określonych porządków dyskursywnych grupom podporządkowanym, albowiem: „Historia nieustannie dowodzi, że dyskurs jest nie tylko czymś, co tłumaczy walki i systemy panowania, lecz również tym, dla czego i poprzez co walczymy – jest władzą, którą usiłujemy zdobyć”. Dyskurs jest nieustannie kontrolowany – oprócz zakazu, w procesy cenzury włączane są czynności podziału i odrzucenia, wymierzone w marginalizowane grupy społeczne (a także takie, które nie realizują interesu władzy).

Rasizm opiera się na wartościującej kategoryzacji, jest „przypisywaniem różnicom rasowym (antropologicznym) znaczenia aksjologicznego, uznawaniem, że istnieją rasy „wyższe” i „niższe” lub „lepsze” i „gorsze” i wyprowadzaniem z tego poglądu konsekwencji moralnych i politycznych” (Olszański 1997). W proces ustanawiania dyskursu rasowego zaprzęga się cały wachlarz praktyk przemocy symbolicznej. Jedną z figur retorycznych, o których warto wspomnieć w tym kontekście, jest „czern”. Jej znaczenie neutralne odnosi się do chłopów pańszczyźnianych należących do klasztorów i majątków kościelnych (od rusińskiego słowa „czerniec”, oznaczającego mnicha), posiada jednak także pejoratywne konotacje:

Choć może się wydawać, że „czern” jest przede wszystkim krzywdzącą nazwą metaforyczną, która pogardliwie nazywa społeczną kondycję chłopca na Rusi, to jest też w tym określeniu komponent rasistowski, który eksponuje wyższość jasnych włosów i skóry nad ciemnymi (Koziołek 2016).

Czerń w historii zachodnioeuropejskiej kultury utożsamiana była ze złem, nocą, zniszczeniem, żałobą, śmiercią, grzechem, szatanem, uważano ją za przeciwieństwo

<sup>1</sup> Teza ta przyswieca m.in. Przemysławowi Wielgoszowi w pracy *Gra w rasy. Jak kapitalizm wynalazł Innych, żeby podporządkować wszystkich*, Kraków 2021.



światła (Wlezień, b.d.) – z tego powodu została ona symbolicznie powiązana z podporządkowaną klasą społeczną I Rzeczypospolitej w toku urasawiania. Kulturowe postrzeganie czerni mogło także odegrać znaczącą rolę w ustanawianiu systemowej dyskryminacji rasowej czarnoskórych w XVIII-wiecznych i późniejszych Stanach Zjednoczonych, jednak problem ten jest dużo bardziej złożony, mimo że niektóre mechanizmy pozostają uniwersalne:

Za sprawą buntów kozackich i chłopskich w XVII w. znaczenia „czerni” zlewają się, łącząc w jedno chłopów pańszczyźnianych należących do prawosławnego duchowieństwa, prawosławny lud w ogóle, zbuntowane chłopstwo popierające Kozaków, a nawet żądną rabunku i krwi tłuszcę o słabej wartości militarnej, jak część oddziałów tureckich opisanych przez Wacława Potockiego o „Transakcji wojny chocimskiej”: „czerń, szarańcza, motłoch, skomon, smoła” (Koziołek 2016).

Podobna narracja pobrzmiewa w twórczości Henryka Sienkiewicza w jego słynnej już *Trylogii*. Na pejoratywny stosunek polskiego prozaika wobec chłopstwa uwagę zwraca Paweł Wiktor Ryś (2019), podkreślając znaczenie dychotomii „pan-cham” w utworach noblisty. Do grupy tych pierwszych zaliczył on m.in. szlachtę ruską, zamieszkującą pewną część terytorium współczesnej Ukrainy, do tej drugiej zaś – posługujących się językiem polskim chłopów-katolików. O (proto) rasizmie polskiej szlachty pisze też m.in. Andrzej Zajączkowski, zwracając uwagę na usprawiedliwianie porządku ludzkiego (tu – klasowego) przez szlachciców porządkiem boskim, a więc na przeświadczenie o niezbywalnej naturze chłopskiego poddaństwa (Zajączkowski 1961). Przyczyn zniewolenia chłopów doszukiwano się także w biblijnej genealogii (szlachta jako potomkowie Jafeta, chłopci – Chama), a także w ramach rozwijanej kultury sarmackiej (szlachcice jako legendarni Sarmaci, chłopci jako podbici „tubylcy”) (Ryś 2019). Przekleństwo Chama odgrywało także rolę usprawiedliwienia podrzędnego statusu czarnoskórych mieszkańców Afryki, którzy dostawali się do niewoli.

Różnic pomiędzy chłopami a szlachcicami doszukiwano także w wyglądzie zewnętrznym. W tym kontekście istotnym jawi się działalność polskiego szlachcica Waleriana Nekandy Trepki, autora jednej z najważniejszych prac „szlacheckiej etnografii opisującej chłopów w kategoriach protorasowych” – *Liber Chamorum*:

Trepka, usiłując sporządzić taksonomię chłopskiej cielesności, fizjonomii i mowy, wyprzedził dziewiętnastowiecznych antropologów kolonialnych, frenologów mierzących obwód czaszek i grubość piszczeli (Wielgosz 2021).

W działalności Trepki pobrzmiewają elementy późniejszego medycznego dyskursu rasowego. W jego ujęciu, chłopci mieli posiadać zestaw specyficznych cech, świadczących o ich odmienności gatunkowej. Do różnic tych zaliczano ciemniejszą karnację (w przeciwieństwie do jasnej cery szlachty, niewystawianej na promienie słoneczne), „grubą skórę” i „grube nerwy” (Wielgosz 2021). Te ostatnie cechy dawały przyzwolenie na stosowanie przemocy wobec tych, którzy nie wykonywali swojej pracy wystarczająco ciężko.

Cechy dystynkcyjne nie musiały odnosić się jedynie do fizyczności polskiego chłopca – równie istotna, a może nawet ważniejsza była jego osobowość. Chłop w narracji szlachciców był istotą infantylną i niezdolną do podejmowania samodzielnych decyzji. Cechami go charakteryzującymi były lenistwo czy szeroko pojęte ograniczenie, a także rozpasanie seksualne, manifestujące się w poszczególnych elementach kultury chłopskiej, np. przyśpiewkach.

Pośród poszczególnych elementów urasawiania, o których można mówić w kontekście badań nad polskim protorasizmem, wymienić można:

- a) Powiązanie z symbolem „czerni”, kojarzonym z szatanem, złem, nocą, żałobą;
- b) Esencjalizację i naturalizację różnic kulturowych, wynikających z różniących się warunków bytowych;
- c) Wytworzenie lub podtrzymywanie dystynkcji manifestujących się w wyglądzie, takich jak wyraźna opalenizna, a także przypisywanie specyficznych dolegliwości określonym populacjom;
- d) Poszukiwanie genealogii biblijnej/mitycznej w celu racjonalizacji wyzysku;
- e) Przypisanie zestawu negatywnych (w dyskursie dominującym) cech figurze chłopca.

Rasizm nie jest wynalazkiem XIX-wiecznym, ale ideologia oświecenia, być może niecelowo, wręczyła grupom dominującym narzędzia, które miały im pomóc w ustanawianiu nowoczesnego dyskursu rasowego, wymierzonego przede wszystkim w osoby spoza euroatlantyckiego kręgu kulturowego. To właśnie różnice etniczne i narodowe zaczęły bowiem odgrywać dominującą rolę tożsamościową w XIX-wiecznej Europie, a klasy podporządkowane, takie jak chłopci, zaczęły być włączane w projekty „unaradawiania”, mimo iż projekty nowoczesnych państw narodowych zasadniczo różniły się od siebie, a uczestnictwo grup plebejskich w nowopowstałych nacjach wcale nie było tak oczywiste, jak współcześnie, zwłaszcza na ziemiach polskich.

## 2. Medykalizacja dyskursu rasowego w XIX wieku

Upowszechnienie naukowego terminu „rasy” nastąpiło w XIX wieku wraz z przeniesieniem go z gruntu nauk zoologicznych na grunt nauk o człowieku (Wrzesińska 2021). Proces ten nie bez przyczyny zbiegł się w czasie z rozwojem nauk antropologicznych i powstaniem darwinowskiej teorii ewolucji, szerzej zaś – z okresem charakteryzującym się rozkwitem myśli racjonalistycznej i scjentyzmu. Antropolodzy (i nie tylko oni) upatrywali się w odkryciach Charlesa Darwina szansy na opis własnego przedmiotu badań, a ich nauka, jak zauważa Jan Strzałko, stanowiła „o zróżnicowaniu człowieka, szeroko rozumianej zmienności gatunku ludzkiego, zarówno w czasie, jak i w przestrzeni” (2009: 273–274). Pojęcie „rasy” zostało wprowadzone w połowie XVIII wieku przez francuskiego uczonego Georges-a-Louisa Leclerca de Buffona, zastępując Linneuszowski termin „odmiana” (Twardowski 2014).

Jednym z kluczowych pojęć tego okresu rozwoju antropologii stało się pojęcie ludzkiej rasy. Współcześni badacze wskazują, że kategoria ta stanowiła raczej niezbywalny paradygmat, aniżeli możliwą do poddania weryfikacji hipotezę badawczą; antropologia u swych źródeł była więc naznaczona poważnym błędem epistemologicznym (Biondi, Rickards 2002). Jak zauważa przywoływany już Jan Strzałko, sam Charles Darwin podchodził do terminu „rasa” z dystansem zauważając, że „używając typologicznej kategorii „rasa” przyrodnicy zakładają jej obiektywne istnienie, tak jak gatunku” – ojciec ewolucjonizmu podkreślał fakt, że mimo istnienia wyraźnych różnic w wyglądzie poszczególnych „ras”, to „zmienność tych cech ma charakter ciągły w obrębie całego gatunku, a także znaczna jest wewnątrz grup uznanych za rasy”. Ponadto wskazywał, iż przedstawiciele „tak zwanych ras” (jak sam pisał uczony) mogą krzyżować się ze sobą bez negatywnego wpływu na prawidłowy rozwój potencjalnego potomstwa (Strzałko 2009: 275).

Pojęcie rasy ludzkiej nie doczekało się skryształowanej, powszechnie zaakceptowanej definicji. Określenie to, cytując Katarzynę Wrześcińską, „okazywało się wygodną kategorią wskazującą na odmienność pochodzenia, wyglądu i obyczajowości ludzkiej i stanowiło nieodłączny element opisu dziejów, podróży, ludności i jej natury” (2021: 2). W tym sensie w XIX wieku w ramach relacji polsko-niemieckich rozróżniano choćby rasy słowiańską i germańską (Wrześcińska 2021: 3), ale podziałów tych kreślono zdecydowanie więcej – niektórzy badacze wyznaczali ich dziesiątki, jednak ich rozumienie rasy przypominało to, co obecnie kryje się pod pojęciami „typ rasowy” czy „typ ludzki” (Kubica-Heller 2015). Miały one zazwyczaj charakter arbitralny, a najłatwiej było je zdefiniować poprzez fizyczne wyznaczniki rzekomej rasy, takie jak kolor skóry, rodzaj włosów czy kształt czaszki (zob. Wrześcińska 2021).

Grażyna Kubica-Heller wskazuje, że popularne w XIX wieku atrybutywne rozumienie kultury wczesnych teoretyków ewolucjonistycznych „nie pozwalało na skonceptualizowanie ludzkiej różnorodności i właśnie tę rolę pełniło pojęcie *rasy*” (2015: 88). Wraz z upowszechnieniem się ujęcia dystrybutywnego, pojęcie ludzkiej rasy zaczęło tracić na znaczeniu w naukach antropologicznych, ale pozostało obecne w języku i myśleniu potocznym.

Ta sama autorka stara się dogłębnie zrozumieć fenomen pojęcia rasy ludzkiej we wczesnej antropologii i wysnuwa kilka istotnych wniosków:

Rozumienie pojęcia „rasy” we wczesnej antropologii wynikało, jak sędzę, z kilku okoliczności:

- 1) koncepcji samej antropologii, która według jej teoretyków była nauką zajmującą się człowiekiem pod względem biologicznym, społecznym, a także jego wytworów;
- 2) teorii ewolucjonistycznej z jej atrybutywnym rozumieniem kultury, co powodowało, iż nie potrafiono ujmować zróżnicowania między ludźmi w kategoriach kulturowych poza różnicą w poziomie rozwoju cywilizacyjnego;
- 3) pojęcie rasy odwoływało się do percepcyjnych oczywistości: ludzie różnią się między sobą, co widać gołym okiem (tak jak oczywistością było zróżnicowanie płciowe);
- 4) nauka polegała na katalogowaniu, na dzieleniu na kategorie, więc wydzielenie i porządkowanie ras ludzkich było uważane za poważne zajęcie naukowe (Kubica-Heller 2015: 107).

Jak podaje Nature Genetics (2000), w 1997 American Association of Anthropologists apelowało do amerykańskiego rządu o zrezygnowanie z określenia rasy, ponieważ koncept ten jest „społecznym i kulturowym konstruktem bez naukowego uzasadnienia w naukach biologicznych” (s. 97–98). Postulat ten stanowił symboliczne zwieńczenie wieloletnich badań i dyskusji dotyczących zasadności używania terminu „rasy ludzkiej” w naukach przyrodniczych. Obecnie wielu naukowców (w tym socjologów) zwraca uwagę na konstruktywistyczną naturę „ludzkiej rasy”. W tym kontekście istotne będą badania przeprowadzone w latach 70. przez Richarda Lewontina (1972) dotyczące zmienności wewnątrz- i zewnątrzgrupowej. Uczony dowiódł w nich, że najwięcej różnic (aż 85%) w zmienności genetycznej badanych populacji (określanych jako „rasy”) występowało w obrębie członków zaliczanych do jednej społeczności, nie zaś pomiędzy poszczególnymi „rasami”. Wniosek ten miał negować istotność stosowania kategorii rasowości w prowadzonych badaniach na polu genetyki czy biologii. Istnieją jednak także uczeni, którzy zwracają uwagę na postęp w dziedzinie obu tych nauk, który dokonał się od czasów badań Lewontina i kierują uwagę w stronę najnowszych publikacji, które pozwalają przeanalizować ludzkie DNA w sposób dokładniejszy i wykazać pewne różnice międzypopulacyjne, tym samym rewidując tezę dotyczącą konstruktywistycznej natury ludzkiej rasy (Shiao, Bode, Beyer, Selvig 2012). Autorzy artykułu zdają sobie sprawę, że płynące z niego wnioski mogą „otwierać tylne drzwi dla biologicznego rasizmu” (Shiao, Bode, Beyer, Selvig 2012: 83), ale uważają, że konieczne jest uznanie koegzystencji biologicznych podstaw rasy lub etniczności i kontekstu społeczno-kulturowego, z którym wiąże się m.in. nieodzowna tendencja ludzi do nadawania znaczeń.

W celu obiektywnego wyznaczenia ras bardziej i mniej wartościowych, na początku XX wieku w USA zaczęto poszukiwać metod mierzenia inteligencji. Kraj ten już wcześniej złączył figury niewolnika i osoby czarnoskórej w jedną całość (prawdopodobnie zabieg ten stanowił pokłosie rebelii Bacona z XVII wieku). Oświeceniowy ideał nauki, który za cel stawiał sobie obiektywne poznanie rzeczywistości, racjonalizm i empiryzm włączony został w procesy urasawiania *Innych*, w tym przypadku – szczególnie mieszkańców Stanów Zjednoczonych afrykańskiego pochodzenia. Zwrócił na to uwagę m.in. włoski historyk Enzo Traverso (2011), pisząc o zespoleniu nauki i polityki w postaci biologicznego spojrzenia na zachowania społeczne i medykalizacji strategii władzy. O roli tego ideologicznego zaplecza rozprawia Piotr Kendziorek (2011), który o istocie biologizmu w legitymizacji doktryn społecznych pisze w następujący sposób:

Biologizm społeczny obejmuje zwykle trzy wzajemnie ze sobą powiązane aspekty: 1. Interpretację zjawisk społecznych w kategoriach biologicznych (takich jak konstytucja cielesna czy dziedziczność itd.); 2. Przyjęcie na gruncie tego typu interpretacji wniosku o istnieniu w danej populacji (bądź całej ludzkości) hierarchicznego zróżnicowania ludzi odpowiednio do przypisanych im cech biologicznych; 3. Klasyfikacja biologiczna ludzi staje się podstawą dla uzasadnienia sytuacji zróżnicowania ich możliwości dostępu do społecznie ważnych zasobów (o charakterze ekonomicznym, politycznym czy socjalnym).

Wyżej wymienione testy na inteligencję ogrywały znaczącą rolę w utrwalaniu stereotypu migranta-idioty do lat 20. XX wieku (Tehrani 2000). Antropolodzy wypracowali jednak cały wachlarz praktyk, polegających m.in. na mierzeniu obwodów czaszek w poszukiwaniu różnic gatunkowych, służących wyznaczeniu obiektywnych ras. Co ciekawe, przez długi okres Irlandczycy, Włosi, Grecy czy Słowianie nie byli postrzegani jako reprezentanci „rasy białej” – etnocentryzm angielskich czy francuskich uczonych wykluczył z dyskursywnego centrum nawet tych, którzy wizualnie nieszczególnie się od nich różnili (świadczy to o arbitralnym i zideologizowanym charakterze ich klasyfikacji).

Jest to wzorcowy przykład medykalizacji strategii władzy, który okazał się szczególnie zgubny dla czarnoskórej mniejszości Stanów Zjednoczonych. Gdy pojęcie rasy pojawiło się w ramach dyskursu naukowego w XIX wieku, jej społeczną niższość można było poprzeć paranaukowymi teoriami o istnieniu ras wyższych (przede wszystkim białej niemieckiej i angielskiej arystokracji) i niższych. Na drodze kolejnych działań społeczno-ekonomicznych, „rasa czarna” zaczynała stawać się faktem społecznym. Czarnoskórzy niewolnicy inaczej jedli, inaczej się poruszali, zapadali na rzekome choroby charakterystyczne „dla danej rasy” – chorobą taką było choćby „uciekiniertwo”. Samuel Cartwright, lekarz z Luizjany, w 1851 roku zdiagnozował u czarnych niewolników patologiczną tendencję do ucieczek z plantacji – pogląd ten wynikał, rzecz jasna, z założenia, że czarnoskóry człowiek jest predysponowany do podporządkowania białemu panu (Kaszycka 2008).

Zjawisko to należy rozpatrywać w kontekście teorii Michela Foucaulta dotyczących powiązania wiedzy z władzą, w tym władzą dyskursywną. Justyna Nowak (2017) w następujący sposób pisze o filozofii francuskiego uczonego:

Wiedza ma [...] nieodłącznie spleść się z władzą w tym sensie, że tworzenie wiedzy i jej przekazywanie odbywa się zawsze w pewnych instytucjonalnych ramach otoczonych nimbem autorytetu niepodważalnej prawdy. Wiedza nie sprowadza się tylko, jak chcieliby skrajni pozytywiści, do opisu faktów, wyjaśniania i prognozowania obiektywnych procesów, ale dogłębnie kształtuje nasz sposób rozumienia siebie, świata i zamieszkujących go ludzi, dostarcza ponadto kryteriów oceny oraz praktycznych wzorców dla szeregu jednostkowych, społecznych, politycznych, prawnych, ekonomicznych etc. działań, które tworzą znany nam świat kultury.

Możliwość definiowania normy i patologii sprzyja utrwalaniu systemu dominacji, w tym zaś przypadku – systemu białej dominacji.

W ramach amerykańskiego dyskursu rasistowskiego wymieniane były następujące cechy rzekomo wynikające z biologicznych uwarunkowań czarnoskórych ludzi – lenistwo i lekkomyślność (figura Santo i Welfare Mother), dzikość, ponadprzeciętna sprawność seksualna (figura Jezebelle), wrodzona siła i poczucie rytmu czy większa niż biali odporność na ból (Green 1998). Z kolei Angela Davis (2022) w swojej kultowej już książce jeden z rozdziałów poświęciła omówieniu mitu czarnego gwałciciela, który narodził się w czasach amerykańskiej Rekonstrukcji. Służył on jako powszechnie spotykane uzasadnienie linczów aranżowanych przez białą tłuszcę.

Historia systemowego rasizmu i wykluczenia stanowiła jeden z fundamentów narodzin czarnej tożsamości. Obecnie aż 74% czarnoskórych mieszkańców USA uważa swoją rasę za istotny element identyfikacji i czuje się związanych z czarną społecznością (Barroso 2020). Fakt ten można tłumaczyć tendencją do łączenia się w większe grupy i budowania tożsamości w okresach długotrwałych konfliktów, w tym przypadku – z białą większością. Ruchy społeczne na rzecz wyzwolenia Afroamerykanów (m.in. ten związany z działalnością Martina Luthera Kinga czy Black Panther Party) można interpretować w kategorii zbiorowego praxis. Lata 60. i 70. XX wieku były okresem walk o zdefiniowanie rasy na nowo, utworzenie czarnej tożsamości i czarnej dumy.

Podstawowym celem urasowienia *Innego* jest wytworzenie różnicy pomiędzy nim a grupą własną lub wykorzystanie różnic już istniejących, przy jednoczesnym przypisaniu im arbitralnego znaczenia. Historycznie celem tego zabiegu było usprawiedliwienie nierównego traktowania i zepchnięcie na dolne szczeble klasowej hierarchii, przy jednoczesnym „poszanowaniu” wolnościowych haseł głoszonych w XIX-wiecznej Europie. Postępująca biologiczna legitymizacja władzy, rozumianej także jako władza do ustanawiania znaczeń, sprowadziła rasę do czegoś niezbywalnego i oczywistego, tym samym podtrzymując protorasistowski status quo.

### 3. W poszukiwaniu cech wspólnych

Celem ustanawiania dyskursu rasowego jest kreowanie *Innych*, wyjętych spod prawa i pozbawionych władzy do samostanowienia. Niebagatelną rolę w tym procesie odgrywa zjawisko, które Erving Goffman (2007) zawarł w swojej teorii piętna. Pomimo że w refleksji uczonego pojawia się ono przede wszystkim w kontekście choroby, to można je zastosować w przypadku badań nad performatywną naturą rasowości. W ujęciu tym, jednostka dotknięta chorobą (lub zidentyfikowana jako *Inna*) zostaje społecznie naznaczona, a naznaczenie to może przyjąć charakter etykiety i stać się źródłem piętna, tym bardziej, jeżeli jej oznaki mają charakter fizyczny. Powstanie stereotypowej figury polskiego chłopca czy Afroamerykanina poskutkowało przykładaniem większej uwagi do określonych wzorów zachowań w celu uniknięcia naznaczenia. Jednostki podporządkowane mogą zinternalizować piętno narzucone przez władzę. Goffman fenomen ten nazwał „samooznaczeniem”. To właśnie odmówienie możliwości samodefiniowania siebie *Innym* przez lata utwierdzało ich o wrodzonej „ułomności”, klasy panujące zaś – wyższości. Poskutkowało także zjawiskiem, które w amerykańskiej literaturze znane jest jako *acting white* – zachowywanie się „jak biały”, „odgrywanie białego” (zob. Christie 2010). Przyjmowanie określonego zestawu cech i zachowań miało chronić przed naznaczeniem i tyczyło się choćby spożywanego posiłku – o roli smażonego kurczaka w ustanawianiu rasistowskiej narracji wobec czarnoskórych Amerykanów pisze w swojej pracy Psyche Williams-Forsson (2013).

Interesującym jest fakt, że pomimo różnic kulturowych, geograficznych i czasowych cechy przypisywane *Innym* pozostają relatywnie niezmiennie. Zarówno polski chłop pańszczyźniany, jak i czarnoskóry mieszkaniec Ameryki był w dominującej narracji postacią lekkomyślną, infantylną i niezdolną do samostanowienia, a nawet samodefiniowania. Trwonienie zasobów i nieumiejętność gospodarowania są zaś czynnościami i cechami szczególnie niepożądanymi w ramach rozwijającej się gospodarki rynkowej, stawiającej na racjonalność i optymalne zużycie zasobów. Nie bez powodu medykalizacja dyskursu rasowego i postępująca ekspansja kapitalizmu odbywały się w podobnym czasie. Zwrócił na to uwagę m.in. Przemysław Wielgosz (2021). Dychotomia cywilizacja/barbarzyństwo odgrywa kluczową rolę w procesie urasawiania, stanowiąc niejako jego rdzeń. Wywodząc się z gruntu europejskiego, miała ona istotne znaczenie dla ekspansji narracji kolonialnej na podbijane ludy.

*Inny* to bowiem dziki, nieucywilizowany (nie)człowiek. Narracja ta przybierała na sile zwłaszcza w okresach buntów i powstań, kiedy „chordy” opętanych rządem mordy burzyły stary porządek. Warto zaznaczyć, że w podobnym kontekście mówi się współcześnie o migrantach z krajów Bliskiego Wschodu, którzy docierają do Europy. Figura dzikiego odsyła z kolei do brudu – w procesie urasawiania on także odgrywa niebagatelną rolę. Brudne ręce chłopów kontrastowały z nietkniętymi pracą dłońmi szlachty, „rasy niższe” według przedstawicieli „ras wyższych” pachniały zaś z reguły gorzej. William Tullett (2016) podaje przykład Żydów, których *foetor* traktowany był w tradycyjnym angielskim społeczeństwie jako kara od Boga, w okresie oświecenia zaś – jako efekt ich specyficznego stylu życia. Brud i brzydki zapach stały się uciążliwe dla Europejczyków stosunkowo późno, jednak wraz z ich „wynalezieniem”, stały się one kolejnymi elementami dystynkcyjnymi służącymi do podziału społecznego<sup>2</sup>.

W powszechnej opinii zarówno chłopci, jak i Amerykanie traktowani byli jako istoty leniwe i uciekające od pracy. Jest to, rzecz jasna, nieprawda – Angela Davis (2022) podkreśla fakt ciężkiej pracy nie tylko zniweolonych czarnoskórych mężczyzn, ale także kobiet na plantacjach w Ameryce. Dominująca narracja pozwalała jednak na stosowanie kar cielesnych, dyscyplinujących podwładnych – w końcu ze względu na rzekome różnice biologiczne, ból nie był odczuwany przez nich tak samo. Pokłosie tego groźnego mitu odgrywa rolę choćby we współczesnej amerykańskiej służbie zdrowia, a niektórzy wciąż sądzą, że pochodzenie rasowe wpływa na odczuwanie i natężenie bólu (Płank 2022).

Istotnym elementem urasawiania jest także odnoszenie się do seksualności *Innego* – obrasta ona bowiem licznymi dyskursami, co ma na celu jej kontrolę i wiąże się z przemianami w zakresie nowoczesnej władzy (zob. Foucault 2010). W omawianym kontekście tyczy się to szczególnie czarnoskórej ludności amerykańskiej – wcześniej wspomniany mit czarnego gwałciciela jest bowiem przejawem szerszego zjawiska, mianowicie traktowania seksualności *Innych*

<sup>2</sup> Brud jest bowiem kategorią obiektywną i ahistoryczną – zob. Ashenburg 2009.

jako potencjalnego zagrożenia, wynikającego z nieumiejętności panowania nad własnymi żądzami i pragnieniami. Narracja ta stanowi odwrócenie rzeczywistego stanu rzeczy – wraz z rozwojem badań postkolonialnych uczeni zauważają, że to niewolnice były szczególnie narażone na gwałty ze strony swoich białych panów. Czyn ten miał zarówno wymiar symboliczny, służył złamaniu ducha oporu i zdemontowaniu władzy, jak i praktyczny – pozwalał na bezkosztowe zwiększanie liczby niewolników.

Każda z opisanych w tym miejscu cech odsyła do takich figur, jak infantylność, nieroztropność, nieracjonalność. Proces urasawiania jest bowiem sprzężony ze swego rodzaju świecą ideologią racjonalizmu (Czarnecki 2015). W jej ramach wszelkie przejawy zachowań niewytłumaczalnych rozumowo lub nieopłacalnych (według klas panujących) spycha się na dyskursywny margines.

#### 4. Podsumowanie i wnioski

Praktyki urasawiania *Innych* historycznie opierały się na przeświadczeniu o istotnych różnicach kulturowych i biologicznych występujących w ramach poszczególnych populacji. Aparat pojęciowy nauk pozytywistycznych, a także filozofia oświecenia wręczyły klasom panującym narzędzia, które miały osadzić dyskurs rasistowski w nowoczesnych biologii i genetyce, czyniąc różnice kulturowe niepodważalnymi, absolutnymi i elementarnymi.

Celem urasowania jest racjonalizacja panujących stosunków społecznych. Jakościowa zmiana pomiędzy protorasizmem a rasizmem właściwym dokonała się wraz z rozwojem europejskiej tradycji oświecenia, racjonalizmu i scjentyzmu. Jednak zarówno protorasizm szlachecki, jak i rasizm naukowy wywodzą się z jednego etnocentrycznego rdzenia – dlatego tak ważna jest dla nich dychotomia centrum/peryferii, a także normy/patologii. Cechy przypisywane urasawianym *Innym* nie różnią się szczególnie w czasie i przestrzeni. Zaliczyć do nich można: dzikość, lenistwo, rozpasanie seksualne, brud, gnuśność.

Choć biolodzy udowodnili, że nie ma istotnych różnic w funkcjonowaniu poszczególnych „ras” ludzkich, arbitralne podziały wciąż powstają i pokutują w świadomościach wielu ludzi. Rasa ludzka istnieje jako fakt społeczny – będąc zaś nim, wywiera wpływ na kształt wielu społeczeństw i społeczności lokalnych. Dyskutując o pojęciu ludzkiej rasy warto pamiętać o jego piętnującym i naznaczającym charakterze. Refleksyjne podejście do omawianej kwestii jest niezwykle potrzebne, tym bardziej że pojęcie ludzkiej rasy ma wciąż charakter zarówno polityczny, jak i klasowy.



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## GENDER SOCIALISATION AND PERCEPTION OF GENDER BY NON-HETERONORMATIVE PEOPLE

**Abstract.** The submitted report focuses on the results of research carried out for a bachelor's thesis titled "gender socialisation and perception of gender by non-heteronormative people", in which the author focuses on gender socialisation of interviewees of non-heteronormative gender and/or sexual identity, their narrative about gender identity (in general, as well as personal sense) and gender expression, social roles expected of them as a result of their gender assigned at birth and restrictions they face in their daily life due to their gender identity. Social constructivism points out that masculinity and femininity are not constant but able-to-be-modified fluid products of everyday interactions. The process of constructing one's gender connotes strictly with domineering discourse defining norms of masculine and feminine behaviour, which become overwhelmingly restrictive in regards to an individual's thinking and actions. For this research, data was gathered from nine individual in-depth interviews supported by a script. During those interviews, interlocutors shared their personal stories about their gendered upbringing, explained what it means to identify with gender on a spectrum, indicated it through appearance and described their coming-out experiences.

**Keywords:** gender studies, gender identity, coming-out, queer studies, non-heteronormativity

## SOCJALIZACJA PŁCIOWA I POSTRZEGANIE PŁCI PRZEZ OSOBY NIEHETERONORMATYWNE

**Abstrakt.** Artykuł koncentruje się na wynikach badań przeprowadzonych na potrzeby pracy licencjackiej zatytułowanej: „Socjalizacja płciowa i postrzeganie płci przez osoby nieheteronormatywne”, w której autorka koncentruje się na socjalizacji płciowej rozmówców o nieheteronormatywnej tożsamości płciowej i/lub seksualnej, ich narracji na temat tożsamości płciowej (w sensie ogólnym, jak i osobistym) i ekspresji płciowej, oczekiwanych od nich rolach społecznych w wyniku płci przypisanej przy urodzeniu oraz ograniczeniach, z jakimi spotykają się w życiu codziennym

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ze względu na swoją tożsamość płciową. Konstruktivism społeczny wskazuje, że męskość i kobiecość nie są stałymi, ale zdolnymi do modyfikacji płynnymi wytworami codziennych interakcji. Proces konstruowania własnej płci wiąże się ściśle z dominującym dyskursem definiującym normy męskiego i kobiecego zachowania, które stają się przytłaczająco restrykcyjne w odniesieniu do myślenia i działania jednostki. Na potrzeby omawianego badania zebrano dane z dziewięciu indywidualnych wywiadów pogłębionych wspartych scenariuszem. Podczas tych wywiadów rozmówcy dzielili się swoimi osobistymi historiami na temat wychowania płciowego, wyjaśniali, co oznacza identyfikacja z płciowym spektrum, wskazując na wygląd i opisując swoje doświadczenia związane z coming-outem.

**Słowa kluczowe:** gender studies, tożsamość płciowa, coming-out, studia queer, nieheteronormatywność

## 1. Introduction

Gender is a crucial factor in one's perception of self and one's function in society. For a patriarchal society, it is typical to recognise gender in a binary system in which two sexes, women and men, have distinctly different predispositions allegedly stemming from biology. Queer (non-heteronormative) community brings attention to the fact that gender expression and perception is personal to each individual. Today, multidimensionality and versatility of both gender identity and gender expression are a topic of discussion.

Gender differences are considered prominent, so they go unnoticed in day-to-day life. According to social constructivism, gender develops through everyday social interactions with other individuals. The basis of social constructivism in gender/queer studies are Judith Butler's works, especially the theory of gender performativity in which gender is appointed through an act of performance: an individual attains gender at the moment of birth, and since that moment, a person constitutes oneself only through gender; gender roles become sort of a task which has to be fulfilled. Therefore, gender becomes true only when performing it (Kochanowski, Mizielińska 2014: 462).

The presented article results from research for a bachelor's thesis regarding gender socialisation and gender perception of non-heteronormative individuals. It focuses on the narrative of interlocutors regarding gender and its expression, as well as their socialisation and coming-out experiences concerning their gender identity and/or sexual orientation.

## 2. Socialisation and gender identity

According to social constructivism theory, sex and gender are constructed through social interactions. Not only gender but human bodies as well can be constructed and reconstructed through various actions (i.e. through a restrictive diet or plastic surgery).

The human body and its biology are not undisputed – both can become subjects of human will. Social constructivism theorists establish that cultural differences between genders are a direct result of noticing specific biological differences contributes to upholding those cultural contracts (Giddens 2010: 132–133).

Gender is a primary criterion to be recognised in a social setting. It is one of the essential elements to building one's individuality and can be expressed outwards in many ways – by gestures, behaviour or external appearance (Titkow 2014: 541; Oczko 2014: 71–73). Expression of one's physical appearance is a result of one's gender and sexuality – all of which are often present in *queer performances*. Queer performance is portrayed as a rebellion against binary gender perception (Mazanek, Dellert 2023: ep. 2), during which a person mindfully creates an exaggerated persona in order to deride societal gender roles (Oczko 2014: 73). A language, the main communication channel, represents the current world. Some languages signal gender dissimilarity through various collocations or phrases (“boys will be boys”, “manly decision”) (Pankowska 2005: 69–71). Even a given name can indicate one's identity (Pankowska 2005: 72–73).

The presented article incorporates language characteristics for gender studies features. Definitions of those terms, such as gender dysphoria, coming-out, transition, transgender, non-binary and queer, are outlined below.

According to the American Psychiatric Association, gender dysphoria is psychological anguish resulting from incongruence between an individual's sex assigned at birth and their gender identity. To overcome gender dysphoria, transgender individuals undertake actions such as social affirmation (i.e. changing one's name or voice training), legal affirmation (i.e. changing gender and name in their official documents), medical affirmation (i.e. hormonal therapy) and/or surgical affirmation (i.e. breast augmentation or masculine chest reconstruction). It is important to underline that it is an individual decision whether a person will undergo any changes based on their gender identity and personal desire for a certain gender expression. The fifth edition of the Diagnostic and Statistical Manual of Mental Disorders describes gender dysphoria in adolescents and adults as incongruence between an individual's expressed gender and gender that was assigned at birth, lasting at least six months and manifested by various components (such as a strong desire to be treated like the other gender) (Turban 2022).

Coming-out is usually an act considered to be conducted by a person of non-heterosexual identity, but it is also a process undertaken by persons of gender non-conforming identity. Coming-out is a decision to share an individual's non-heteronormative gender or sexual identity with chosen people – whether family members, friends or peers. It is a process of accepting oneself, which comes with a spectrum of emotions (Human Rights Campaign Foundation 2022).

Transition or gender transition is a term used to describe a timeframe between discovering one's gender identity and the completion of the gender reassignment process (Bieńkowska 2012: 151). The gender reassignment process can be split

into two stages: the first one being a start of hormonal therapy, and the second being surgical gender reassignment – it is crucial to underline that not all persons of transgender identity will settle to go through with the whole process (Fajkowska-Stanik 2001: 57).

The term “transgender” is used as an umbrella term for people who do not identify with the gender they were assigned at birth – it is opposite to the term of a cisgender person. The term “non-binary” describes a person whose personal identity might not align with any gender, with two at the same time or somewhere in-between (HRCF 2022).

A non-heteronormative individual was defined as a person whose sexuality is different than generally expected heterosexuality or a person whose gender identity does not align with being either a man or a woman or does not align with their gender assigned at birth (Stowarzyszenie Miłość Nie Wyklucza 2016: 5).

The term “queer” appearing in this article is used interchangeably with “nonheteronormativity”. Most interlocutors define themselves not only based on their gender or sexual identity but also as a queer person, which seems to have become a general label describing affiliation to the LGBT+ community. This term is ambiguous and cannot be used to define one type of gender identity.

### **3. Research methodology**

This research aimed to become acquainted with a process of socialisation of research subjects – to analyse whether their socialisation was stereotypical, if their perception of gender is a direct result of being brought up in a certain environment, and their concepts of gender (in a general, as well as personal sense), social roles assigned due to their gender and restrictions they face in their environment based on their gender identity as well as understanding their gender identity and gender expression. Stereotypical gender socialisation includes statements adults communicate to children, such as the idea of binary gender, dictating that children perform certain activities in gendered groups, designing men and women as separate categories with opposite characteristics, defining activities as typical only for men or only for women (Gawlicz 2009: 95–98). During interviews, the author aimed to gather as much information regarding stereotypical gender socialisation as possible. Gender studies and queer studies literature were the primary sources of information in the process of writing this bachelor’s thesis. An empirical source was acquired through nine in-depth interviews with individuals of non-heteronormative identity living in the cities of Łódź and Zgierz in Poland. The group from which data was collected was picked through a non-probability sampling. Interviewees were selected based on their visibility in the non-heteronormative community and contacted directly by the author. Each interview was based on a scenario, although sometimes interviewees steered away from the main topics to add some

more information they deemed important, which turned out to enrich the material gathered during this research – such as a matter of their sexuality. Although the sexuality of interviewees was not the focal point of this research, it is impossible to overlook the relation between gender and sexual identity. Interviewees of cisgender identity but not heterosexual were picked because of their gender non-conforming expression and openness regarding the rights of a non-heteronormative minority, which was a base of assumption of having numerous opinions regarding sex and gender. It is crucial to underline that nonheteronormativity does not solely equal nonheterosexuality but also the gender non-conforming identity of interlocutors. Characteristics of a research sample are presented below.

**Table.** Characteristics of the research sample

	<b>Year of birth</b>	<b>Educational background</b>	<b>Employment situation</b>	<b>Pronouns</b>	<b>Gender identity</b>
P1	1984	Higher education	Working full-time	He/him	Cisgender man
P2	1996	Secondary education	Working full-time	She/her	Transgender woman
P3	1999	Secondary education	Working part-time, studying	Pl. she/her Eng. They/them	Transgender woman
P4	2000	Secondary education	Working full-time	She/her	Cisgender woman
P5	2001	Secondary education	Working full-time	He/him	Cisgender man
P6	2001	Secondary education	Studying full-time	He/him	Cisgender man
P7	2001	Secondary education	Working full-time	He/him	Agender person
P8	2002	Secondary education	Studying full-time	He/she/they	Non-binary person
P9	2003	Secondary education	Working part-time, studying	Pl. no preference Eng. She/they	Non-binary person

Source: own study

#### 4. Research results

Overall, nine people took part in interviews for this research: four cisgender but non-heterosexual people, two transgender women, two non-binary people and one agender person. The cisgender interlocutor shared his uncertainties, whether it was appropriate for him to identify with his gender assigned at birth due to his non-stereotypical gender expression, such as wearing skirts and make-up, usually



associated with women's wardrobe: "I doubted if it's okay to identify as a man when my expression isn't particularly 'manly'... should I consider myself a man, or maybe a non-binary person? However, I concluded that I shouldn't because being a man defines my whole life" (P5). More interlocutors mentioned that gender could be understood in different ways by different people: "it was a long process for my dad to understand that even if my masculinity is different from his..., even though both of us identify as men, my expression and his expression of that will be way different" (P5). Some commented on how difficult it was for them to categorise themselves in a particular group: "when I ask myself, 'What gender even is?' I find myself in a labyrinth that seems impossible to get out of... and I always come to the same conclusion that gender is different for each person, and if I ever need to redefine it on my own, I will. But not now" (P8). An interviewee of agender identity stated that he cannot put himself in any area of this spectrum because he personally does not experience gender in any way; interviewed transgender women experience it one a spectrum closer to femininity or identify strictly with one side of the spectrum; a non-binary interviewee chooses stereotypical male expression due to comfort of day-to-day life. Interviewees of cisgender identity put themselves in close proximity to their genders assigned at birth, but not precisely at the extreme ending points of the spectrum, allowing themselves for possible changes in self-identification and self-expression. Interlocutors explained their ideas of gender as a spectrum in the following ways:

- Multidimensional spectrum in which neither gender nor individual perception of gender is binary; perception of gender being a direct result of socialisation and one's expression through actions, pronouns or appearance;
- Smooth continuum, with people assigned female at birth on one side and people assigned male at birth on the other side – with non-binary identity in between those.

Interviewees brought up and explained their expectations regarding their expression due to their gender. Some expressed the desire to show unshaved body parts freely: "my mom said that I'm a woman and body hair on a woman is simply disgusting (...), and she said I should expect people to verbally abuse me for having hairy legs" (P4), whereas others stated the need to get rid of any body hair: "(...) that at the beginning I was really worried about my body hair, I hated it, and I remember that it reminded me of millions of little bug legs sticking out from my skin" (P8). Other answers focalised on colourful, non-stereotypical for their gender clothes, jewellery, accessories, piercing and tattoos, specific hairstyles, make-up, using nail polish, hormonal therapy and gender-affirming surgeries.

Interviewees explained that an individual's language indicates affiliation to a specific group. Jargon characteristic for a community of non-heteronormative people is inclusive and comfortable to use for anyone regardless of their identity. It is described as very specific and might not be appropriately understood by people outside of the community – it is supposed to connect members of a given community

and give it a sense of uniqueness: “this jargon is very valuable to us, and I think it’s inherent to our community. What’s important is that we get it; if someone wants to understand us, they must learn the jargon” (P5).

The language of Polish non-heteronormative people has many foreignisms from the English language. Interviewees often used abbreviations like AMAB (assigned male at birth), AFAB (assigned female at birth), or “topka”, derived from the English “top surgery”. Some interlocutors stated they prefer to use English rather than Polish because it is less gendered and brought up the usage of neutral pronouns when speaking their native language. Many recognised a phenomenon of *reappropriation*, which is changing the meaning behind a word historically used as derogatory.

Participants of this study split gender into two categories: cisgender (or gender assigned at birth) and transgender. According to interlocutors, gender is a spectrum, and an individual can identify with either one of those binary ends or somewhere in between as a non-binary person. Gender is not constant, and identity can be created individually by each person, regardless of gender assigned at birth. One respondent determined gender as a social construct – “personally, gender is a social construct. A way of understanding yourself, but in a rather superficial way” (P8). When asked about the most common/ familiar ways of gender expression, respondents named distinctive attire and jewellery, specific and colourful hairstyles, body modifications (tattoos, piercings or gender-affirming surgeries), as well as names a person can pick for themselves, pronouns, voice modulation, language used by an individual, gestures and even dancing.

It was essential to isolate the experience of transgender individuals, which is different from the experience of cisgender people. Some interlocutors declared that gender expression was an instrument allowing them to handle gender dysphoria: “it was a way of presenting yourself, which allowed you to hide certain parts of your body you didn’t like” (P8). It was also noticed that transgender people are more at risk of being analysed in terms of their social behaviour.

The social environment has a massive impact on who an individual develops into, and having an openly functioning, non-heteronormative person in one’s surroundings might positively impact the exploration of one’s identity. The political climate was determined as crucial in terms of wanting to explore oneself safely, as well as movies, TV series, music and cartoons respectfully representing non-heteronormative people: “I think this cartoon, ‘The Owl House’, is the most important to me because it’s so relevant to my situation now. If I notice even a background character whose nails are painted in non-binary flag colours, I feel joy and childlike joy. I noticed how important it is for me now, so I can only imagine how important it would be for me as a child” (P8). Respondents agreed that the best way to seek out information about gender or sexual expression is through non-governmental organisations, collectives, scientific publications and social media – which might be dangerous due to misinformation and possibly harmful content: “Watching

openly transgender people online was meaningful in my transition. Their lives don't revolve around their identity, they're showing their regular lives as perfectly functioning people. Those real-life examples are what matters to me, not some transgender supermodel or an actor. Real-life examples might give courage to those who need it" (P2).

When it comes to the socialisation of interviewees, the main focus was set on how they were addressed, what kind of clothes they wore, what type of toys they played, house chores assigned to them, after-school activities and interests. It was crucial to focus on individual changes in appearance – not only those changes they applied themselves but also those happening due to puberty: “at first, when I started going through puberty, my build started changing... bust, menstrual period, etc... at that point, I knew I'm not too comfortable with those changes” (P7). All individuals who participated in this research stated that – during childhood – family, teachers, and peers regarded them in linguistic forms appropriate for the gender assigned to them at birth. Two interviewees of the male gender assigned at birth remarked that they have often been mistaken for girls when young. All interlocutors agreed they were dressed in stereotypically girly (skirts or dresses) or boyish ways (jeans, T-shirts) during childhood. Some mentioned experimenting with their mother's clothes and/or make-up. There was no significant distinction between “toys for boys” or “toys for girls”, meaning interlocutors were allowed to play with any toys they chose. The same applies to house chores – interviewees were expected to keep their rooms clean and the general cleanliness of shared areas. Only one respondent stated that after his father's death, it was expected of him to take over his responsibilities: “I had to become a man, somewhat the head of the house, because suddenly, at thirteen, I acquired so many responsibilities I wasn't ready for” (P6). Regarding after-school activities, creative endeavours (such as painting and photography) and reading were the most praised by interviewees' parents. Two interlocutors' dream activities were deemed unnecessary, and two more mentioned that their fathers were more encouraging towards them if they invested in stereotypically girly or boyish activities.

When asked about their external appearance, one respondent mentioned being unable to express freely due to partaking in a catholic organisation: “in middle school, I became a scout in a catholic organisation. They had certain expectations of me. Growing up in that organisation, I stumbled over many obstacles regarding my expression – I wanted to paint my nails or dye my hair, but I couldn't because I was too afraid it would become a discussion topic amongst members, and they would dismiss me” (P5). Some of them battled with anxiety when considering sudden changes in appearance at a young age (such as cutting their hair short as a person assigned female at birth: “I asked my mom (...) whether she thinks it's okay for me to cut my hair short... that I would like to cut them short. And she said, ‘Of course!’ and she couldn't understand why am I crying about it” [P9]) or purposely selected clothes considered “more feminine” (which could be regarded

as more appropriate for the gender assigned at birth) due to gender dysphoria: “My mom was really helpful with educating me on the menstrual cycle. I talked with her about it and that I feel uncomfortable with this happening..., and she said it’s normal, that I’m changing and change is uncomfortable. And I thought I would start being comfortable with those changes if I became more stereotypically feminine. So, when I was twelve, I started wearing miniskirts, over-knee socks, push-up bras... everything of sorts” (P7). Four respondents agreed that changing their environment from conservative to unorthodox helped them express themselves more freely: “after leaving this organisation, I realised how many things regarding my outer appearance I held back on because I was so afraid of being dismissed. Only then did I start experimenting and pursuing the person I am now – a person who dresses however they want” (P5).

Most interviewees at the time of interviewing had already gone through the coming-out experience. This particular section has been isolated due to how emotional this process was for interviewees. Most of the interlocutor’s first coming-outs happened in front of peers and family members other than parents and regarded gender identity or sexual orientation. Some explained the case of re-coming out, which is repeated coming out respecting a shift in one’s identity: “at the beginning, I thought I was bisexual (...), so I had to come out two times – first as a bisexual man, then as a gay man” (P6). *Outing*, which is an action of revealing someone’s identity without their permission, was also mentioned as harmful and abusive behaviour. Collocutors brought up that functioning openly as a non-heteronormative person requires constant coming-outs, which does not have to have the form of a solemn conversation – it can be expressed through actions, gestures, appearance or being public about their own experience: “as a matter of fact, my existence is a bit of a coming-out... I create social media content where I function openly as a transgender woman... so each post in which I’m not directly stating that but explaining my experience is somewhat a coming-out as well” (P2). Interlocutors explained that coming-out to their parents required preparation due to fear of not being respected: “I didn’t really want to come out at first because what if I wasn’t sure at all? What if I tell them about something that might change in a short while, and then it will be even harder for them to understand” (P8).

Coming-out experiences of this research participants positively influenced their relationship with their closest environment and brought much relief, understanding of self, and a feeling of “having your own back” (P5). When asked about what their experience lacked, interlocutors expressed a need for more amount of honest talks with their family members, who often suspected their children’s identity; tools allowing non-heteronormative students to function openly and freely in institutions such as universities or schools and materials full of information about non-heteronormative identities available not only for kids but also for their parents: “when I was younger, there were no materials, no information showing elderly transgender people” (P7).

## 5. Conclusion

The presented article outlined different aspects of socialisation and described a phenomenon of gender expression and gender identity as well as various coming-out experiences. The results of this research acknowledge the theory in which an individual constructs gender through taken-up actions. This article might expand the reader's knowledge of the contemporary outlook of young, non-heteronormative individuals regarding subjects in this study (such as their perception of reality). Collected material confirms that gender is a fundamental parameter of one's identity, which might be extremely difficult to define, especially living in a society created upon patriarchal norms.

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## SCHOOL ARCHITECTURE, ITS ADAPTABILITY AND FORMS OF STUDENT'S LIFE AT SCHOOL: A CASE STUDY OF THE ART HIGH SCHOOL IN CRACOW

**Abstract.** The case study research presented here focuses on the modern building of the State High School of Fine Arts in Cracow. The objective was to examine the adaptability of school architecture in response to new educational challenges. The survey gathered data using a paper questionnaire involving most students ( $N = 167$ ). Mixed techniques were used to collect data, including participant drawings and free statements. The investigated issues included evaluating the school's responsiveness to students' needs, understanding the meaning of places, identifying students' favourite places, and exploring the emotional relationship and identification with school goals and use of school space. The findings indicate that students value the school's artistic ambience, desire greater space flexibility for participation and creativity, and a dedicated area for everyday needs.

**Keywords:** architecture, art high school, modern architecture, students' life, qualitative research

## ARCHITEKTURA SZKOŁY, JEJ ADAPTABILNOŚĆ I PRZEJAWY ŻYCIA UCZNIÓW W SZKOLE: STUDIUM PRZYPADKU LICEUM PLASTYCZNEGO W KRAKOWIE

**Abstrakt.** Przedstawione tu badania studium przypadku koncentrują się na modernistycznym budynku Państwowego Liceum Sztuk Plastycznych w Krakowie. Celem projektu było zbadanie możliwości adaptacyjnych architektury szkolnej w odpowiedzi na nowe wyzwania edukacyjne. Badania przeprowadzono z użyciem papierowych kwestionariuszy; odpowiedzi na ankietę udzieliła większość uczniów szkoły ( $N = 167$ ). Do zebrania danych wykorzystano techniki mieszane, w tym rysunki uczestników i swobodne wypowiedzi. Badane kwestie obejmowały ocenę responsywności

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szkoły na potrzeby uczniów, zrozumienie przez uczniów znaczenia miejsc, identyfikację ulubionych miejsc oraz analizę emocjonalnego związku i identyfikacji z celami szkoły a wykorzystanie przestrzeni szkolnej. Wyniki badania wskazują, że uczniowie cenią sobie artystyczną atmosferę szkoły, ale także pragną, by przestrzeń szkoły oferowała im możliwość większego uczestnictwa i kreatywności w definiowaniu miejsc, w których toczy się ich codzienne życie w szkole.

**Słowa kluczowe:** architektura, liceum plastyczne, architektura modernistyczna, szkolne życie uczniów, badania jakościowe

## 1. Introduction

The study explores the significance and impact of architecture on the educational environment of a school. The concept of this study originated from the belief that the architecture of a school is the ‘hidden agenda’ of education (Meighan, Siraj-Blatchford 1997). School buildings and spaces co-create the educational environment and shape the activities of the entire school community, particularly students. This belief is supported by studies on school life conducted by anthropologists, sociologists, and researchers in education and by studies describing the multidimensional effects of the built environment (architecture) and its specific impact on students’ engagement, attitudes towards learning, and school. This perspective also results from understanding architecture as a multidimensional entity that extends beyond its visual impact and style and produces far-reaching practical effects. Its most critical aspect is spatial structure, which is coordinated with and shaped by social structures. Thus, architecture is something which ‘has a direct relation – rather than merely symbolic one – to social life, since it provides the material preconditions for the pattern of movement, encounters and avoidance which are the material realisation – as well as sometimes the generator – of social relations’ (Hillier, Hanson 1993: ix).

The role of architecture in shaping the environment of human life, including education, is a widely acknowledged assumption in this study. The theoretical part of this work presents a broader discussion of related theories and empirical research findings. However, the study aimed to investigate the adaptability of school architecture in response to new educational challenges. The research focused on the State High School of Fine Arts in Cracow,<sup>1</sup> a unique and imposing example of modernist school architecture built in the 1960s and a school community that maintains its traditional values. The question is how this relates to the changing image of school and education and the challenges of the current 21<sup>st</sup>-century educational paradigm. Some of this paradigm’s new assumptions say that knowledge is created throughout life in diverse educational contexts (Giddens 2006); it occurs in various locations, including schools, non-institutional settings, and in relation to a place

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<sup>1</sup> Państwowe Liceum Sztuk Plastycznych im. Józefa Klucy w Krakowie.

(Gruenewald 2003). It demands a range of interpersonal relationships, involves student and teacher creativity and involvement, and depends on 'self-learning', which cannot be limited to 'being educated'. More importantly, learning encompasses individualised experiences, making it not just a matter of institutional education (Sfard 1998; Giddens 2006).

Data collected with the questionnaire survey enabled to answer the question of whether the modernist architecture of the school responds to the current educational paradigm. In particular, the following issues were investigated: (1) evaluation of the school's responsiveness to students' needs for learning, creative work, and social contacts; (2) building positive relationships with the school by finding students' own places; (3) description and meaning of students' favourite places in the school; (4) emotional attachment to the school and how it moderates students' activities at school and their opinion on school performance. In addition, the survey investigated how students evaluate the school building and its various parameters, such as school friendliness, character, and comfort, and what they think about it. What are the essential elements of the school environment, and what are their favourite places?

## **2. School space as an environment for students' everyday life – social perspective**

A school is both an organised community of learners and a place. When we look at a school as an organisation, we can see students, teachers, learning programs, school goals, habits, and achievements – all of which can be defined as a school 'culture' or a school community' way of life' (Robinson 2020: 10). If we look at a school as a commonly understood place, we might see a school building, classrooms, and the school environment. These two realities are not separate; the school community is located in a specific place, and the meaning of place is more complex than its appearance. Contrary to an abstract notion of space, it brings meaning that connects human activities and a particular environment. A colloquial expression: 'a place for everything and everything in its place', suggests that place refers to some kind of 'ordering things' (Cresswell 2004: 2). The psychologist David Canter (1977) describes a place as a combination of three types of components: 'conceptualisations', 'activities', and 'physical attributes'. In the case of a school, these would correspond to the goals and values of the school, the behaviours of learners and school staff, and the physical environment in which the school community is located. The concept of the psychology of place is based on assuming a solid relationship between behavioural congruence and the constraints of a given situation (Price, Bouffard 1974; Canter 1977). It also suggests a relationship between expected and observed behaviour in a place. According to this theory, a place can function well if the percentage of behaviours observed in the place consistent with place-related expectations ('appropriate') is



much greater than the percentage of behaviours inconsistent with those expectations. In the case of a school, though, the actual assessment of such conformity may be complex because of certain constraints imposed on users by the school organisation and different perceptions of the school's meaning. A statement by Ken Robinson, a British education expert, sheds some light on these differences (2020: 10):

There are important differences between learning, education and school. Learning is acquiring new knowledge and skills; education is a planned programme of learning; a school is a community where education is meant to happen. ... Children love to learn; however, they don't always enjoy education, and some have serious problems with school. Those problems often have to do with the culture of schools, including the physical spaces they inhabit.

School education by official learning programs often limits the scope of knowledge and regulates what is good and proper for students, but it cannot contain the inner life of the school. There is usually much more happening behind the school walls than the official curricula suggest. A significant source of experience and knowledge for students is the context of informal learning situations. Martyniuk (2019: 53) describes different categories of everyday school life depending on: (1) relationships with others – ‘with whom it happens?; (2) type of rituals – ‘how it happens?; (3) location of events – ‘where it happens?; (4) social roles – ‘which way it happens?; (5) specific school space – ‘what kind of setting is this happening in?’

The categories of school life refer to various theoretical concepts, most notably action theory, critical pedagogy, and the theory of school as ritual performance, drama, or play. Some of these concepts, such as critical pedagogy, describe situations and relationships that go far beyond the territory of the school building. What the theories described here have in common is a move away from a simple way of explaining the relationship between behaviour and its causes. Rather than simple responses to specific stimuli, actions these theories analyse are individual or collective, complex, situational constructs. They tend to be grounded in the specific meanings that certain things and activities of other people have for individuals. One of the key terms here is ‘symbolic interaction’. As presented by Herbert Blumer (1969), actions are conditioned by ‘culture’, ‘social systems’, ‘social stratification’, and ‘social roles’, but these structural systems do not determine them; ‘people – that is, acting units – do not act toward culture, social structure or the like; they act toward situations’ (87–88). According to action theory, all meanings – including the meanings of social artefacts and cultural assets such as schools – are the product of specific human actions. Relationships with others – interactions – create the world of everyday life, which has a specific intersubjective meaning for people in schools and which is, in a sense, an obvious source of knowledge. This way of thinking plays a role in people's lives as a frame of reference for life-experience interpretations.

On the other hand, according to action theorists, knowledge of social processes is possible only through the observation of interactions in which individuals begin to share the same world. To distant observers, these actions are not necessarily

rational, 'appropriate', and predictable. Nevertheless, they are made possible by individuals' 'self-reflexivity' embedded in personal development, past, present, and imagined future interactions with others, symbolic meanings of the external world, membership in social worlds and sub-worlds, and emotions related to social situations (Strauss 1993).

Proponents of symbolic interactionism posit that meaningful objects and settings in the environment, which different individuals can interpret differently, play a crucial role in human behaviour. A well-known concept stemming from symbolic interactionism is the notion of life as theatre (Goffman, 2000). Goffman's theory has been applied to the school environment, viewing students and teachers as actors in a theatrical production and the school's physical space as the stage with a clear division between 'front stage' and 'backstage'. The timing of the performance is also defined, with breaks between acts (Janowski 1995: 37). Different rules apply in the classroom ('front stage') and in areas outside of it, like school corridors, restrooms, or the schoolyard ('backstage'). Students and teachers can relax and move away from their roles offstage. Anthropological research has made comparable findings, interpreting school life through ritual practices. McLaren (1999) noted that schools offer various ritual systems at the macro and micro levels (e.g., linked to specific lessons). Such systems form the inconspicuous foundation for diverse school events and rituals that make the unfamiliar seem familiar, or the familiar appear strange.

Consequently, the execution of school rituals and a school play influence distinct changes in student performance. These behavioural differences become even more apparent outside the school grounds. McLaren (1999: 94) explains the contrasting interactions between the 'student state' and the 'street-corner state', each exhibiting distinct interactions. Examples of these interactions within adjacent states are: 'institutional-tribal', 'cognitive-emotional', 'serious-ludic', 'task-oriented-whimsical', 'work-play', 'gesture-motion', and 'fixed space-informal space'.

Pierre Bourdieu's perspective on the theory of reproduction offers a different view of school. From this point of view, school appears to be a kind of strategic game played out in education. Some strategies are used to overcome social class differences, others to survive in school. Players (students) enter the game with different types of capital, which determine their relative strength in the game and their position in the game space, as well as playing strategies that determine their chances and the outcome of the game (Bourdieu, Wacquant 2001: 78). This initial capital has been shaped by a 'habitus' – a way of life that was learned at home. It then becomes 'a resource with which individuals enter the game, or rather the struggle for survival, for the first time' (Jacyno 1997: 111). According to this theory, all the choices made by human beings are not entirely free but are conditioned by the social environment. Ultimate success in the educational game may depend not only on the size and structure of capital but also on strategies adopted, influenced by objective structures of possibilities. In this sense, habitus is neither external nor internal; it is the result of the social, a product of being in society (Jacyno 1997; Martyniuk

2019: 75). The individual is portrayed here through his actions and motivations, as caught up in a situation and trying to solve it with the tools available to him. In the school game, then, what counts is economic capital (money, possessions), social capital (including positions and connections), and perhaps most importantly, cultural capital (skills, education, habits, styles, tastes).

The political and economic aspects of education carry equal weight in the critical pedagogy theory, which distinguishes itself from other theories by incorporating social responsibility and engagement in activities to enhance education quality and social well-being. Critical pedagogy places particular importance on praxiological efforts to develop a politics of everyday life in various ways, including situating critical analyses within the realm of popular culture. Secondly, critical pedagogy examines the theoretical connections between daily discourses and social practices that construct and fortify power relations and act as arenas for contestation, opposition, and change. It encourages the adoption of concepts such as ‘outdoor education or ‘place-based education’ (Gruenewald 2003) among emerging social movements and the power networks related to education. It attempts to connect the micropolitical aspect (the daily activities of teachers and students) with the macropolitical aspect (economic, social, cultural, and institutional structures). By analysing schooling from the perspective of critical pedagogy, there are chances to establish relationships among schools, the learning atmosphere, politics, and social justice and democracy matters. Henry A. Giroux (2019) states that this pedagogy ‘is not a method but a moral and political practice, one that recognises the relationship between knowledge and power’ (149). It demands ‘responsibility, social action, ... political intervention’ and ‘social critique but also self-critique’ (Giroux 2019: 151):

The relationship between knowledge and power, on the one hand, and creativity and politics, on the other, should always be self-reflexive about its effects and how it relates to the larger world. In short, this project points to the need for cultural workers to address critical pedagogy not only as a mode of educated hope and a crucial element of an insurrectional educational project but also as a practice that addresses the possibility of interpretation as an intervention in the world.

### **3. Architecture of school space – modernist and up-to-date paradigm**

Modern school architecture was developed based on the educational ideas of reforming educators who were active at the turn of the 19<sup>th</sup> and 20<sup>th</sup> centuries. These educators include John Dewey, who advocated for a pragmatic and democratic curriculum based on principles; Maria Montessori, who incorporated humanistic motivations to meet the child’s needs; Rudolf Steiner, who sought to introduce imaginative teaching; and Peter Petersen, who focused on problem-solving rather than coursework. A central tenet of their educational philosophy was the notion of child-centred education. This replaced earlier perspectives prioritising

state, church, or business needs. John Dewey pioneered an education that aimed to enhance society. His experimental school, the Laboratory School at the University of Chicago, sought to establish a 'well-appointed home' as well as a place where students could partake in developmental, intellectual, and social activities and engage in community life expressed through the curriculum (Uline 1997; Lackney 2015). Maria Montessori developed her approach to education as a physician, viewing children as a whole entity encompassing the heart, soul, body, and mind. She emphasised the teaching of cognitive abilities from an early age. Rudolf Steiner concentrated on students' intellectual, artistic, and practical skills in an integrated and holistic manner. He believed that children should primarily be guided by their 'feeling nature' at an early stage and stimulated by imagination and fantasy (Nielsen 2004: 69). Peter Petersen suggested a model of independent learning by doing, cooperation and community life, and shared responsibility between parents and students. Inspired by Petersen's philosophy, the Jenaplan School rejected the traditional teaching structure involving strict age groups, 45-minute teaching units, and confined classroom settings. Instead, the school offered mixed-age groups of learners, open and personalised learning opportunities, and innovative learning environments (Gläser-Zikuda et al. 2012).

Altogether, these groundbreaking concepts greatly influenced education throughout the 20<sup>th</sup> century and the perception of school architecture. The educational architecture of the modern movement prioritised diversified learning environments to accommodate more intricate educational programs, child-centric surroundings to foster a sense of belonging (smaller classes furnished with relevant interior design and furniture), and a closer connection with the natural environment. These environmental elements differ starkly from the 19<sup>th</sup>-century's massive, fortress-like school buildings with large, repeatable classrooms. The most notable instances of contemporary school architecture comprise spacious and low buildings that facilitate several concurrent learning activities and promote acculturation and domesticity by offering individual units with kitchenettes, bathrooms, and storage areas or by welcoming a local community to the school premises. Regardless of the functional ideas mentioned above, according to John Dewey, school architecture should offer aesthetic experiences that 'unify' and give learners a necessary 'pause'. Dewey envisioned school architecture, including extensive grounds, gardens, greenhouses, and 'open air' interiors. Dewey also specified that the school building should house no more than 200 people (Uline 1997). The contemporary vision of school architecture embodies many of John Dewey's aesthetic concerns. It provides visually appealing educational settings that blend in with nature, provide adequate space for all, and incorporate exciting details such as pleasant lighting, warm colours, and well-designed furnishings.

However, most modern architecture did not effectively align with pioneering educational ideas. Many 20<sup>th</sup>-century schools were constructed inexpensively, with buildings designed to facilitate traditional, teacher-centred lessons in homogeneous

classrooms resembling ‘opaque boxes off long straight corridors purely for circulation and hanging coats’ (Hertzberger 2008: 13). The dominant modernist style in educational architecture was characterised by standardisation and large windows that provided greater transparency to the outside. These two factors accentuated the pervasive heroic modernist style seen in all types of architecture during this period. Modernist architects believed that simple, pure forms and natural light would create the space necessary for the hygiene and physical well-being of everyone, especially children. Physiological needs received more attention from architects during that period than cognitive, aesthetic, or social needs. This emphasis occasionally resulted in radical design solutions, including the open-air schools constructed in the 1920s and 1930s or open-plan schools built around 1970. Open-air schools had classrooms enclosed by sliding or folding walls, enabling direct outdoor access. Open-plan schools avoided fixed divisions between spaces, maximising functional flexibility. Regrettably, many of these experimental school buildings were viewed as ‘learning factories’ – monotonous, uninspiring, and failing to meet the needs of students (Walden 2015: 15).

Rooted in the modernist movement and supported by extensive empirical research to evaluate various architectural concepts, the current shift in the pedagogy of space is underway. The research findings suggest a connection between the quality of the educational environment and the level of student engagement. Environmental research has measured the impact of architectural parameters such as building age, quality, design, size, maintenance, lighting, thermal comfort, and indoor air quality. It has also analysed spatial and structural characteristics such as classroom types, interior details such as colour and visual complexity, and auxiliary facilities. For example, studies carried out in eighty American middle schools have demonstrated a significant association between environmental features and the overall ‘school climate’, defined in terms of teachers’, students’, and parents’ perceptions of themselves, student achievement, organisational rules and policies, and the facility itself, which had a direct impact on specific learning outcomes (Uline, Tschanen-Moran 2007). The Holistic Evidence and Design (HEAD) study, examining one hundred and fifty-three British primary schools, verified the influence of physical learning environment variables on the three primary subjects evaluated: reading, writing, and math. These subjects represent distinct types of learning activities, including study, creativity, and problem-solving (Barrett et al. 2016). The researchers used multilevel modelling to isolate and describe the impact of environmental factors on overall and subject-specific learning progress. The HEAD research identified three essential categories of ‘design principles’: (1) Naturalness (such as light, sound, temperature, air quality, and links to nature); (2) Individualisation (including ownership, flexibility, and connection); and (3) Stimulation (such as complexity and colour). As shown by this research, certain design parameters have demonstrated particular significance. There were ‘light’, which encompasses the quality and quantity of natural light,

window orientation, and the degree of control over shading and artificial lighting, and 'flexibility', which includes classroom size and shape, storage and breakout spaces, learning zones, and opportunities for display. 'Color' and 'complexity' were identified as important elements impacting reading and writing progress. Based on the researchers' observations, an optimal visual environment for the effective study consists of an overall balance of white or pale-coloured walls with bright-coloured accents to stimulate the brain and a moderate level of visual complexity with distinctive design but not too many elements. Solving mathematical problems was found to be correlated with 'flexibility', whereas 'links to nature' showed special significance for more creative tasks, such as writing (Barrett et al. 2016).

Unlike a century ago, the new global shift in 21<sup>st</sup>-century school architecture, informed by research, is not revolutionary but relatively progressive in architectural and educational terms. The changes respond to specific design objectives embedded in school philosophy that facilitate the transition from teacher-centred to student-centred spaces. The school's architecture 'for the future' is supposed to provide a sense of place and adaptability. Schools should focus on providing better opportunities for learning through studying, experiential activities, socialising, and engagement with the community. Additionally, they should serve as models for building design, aesthetics, technology, economics, and sustainability while allowing students to have a portion of their personal lives within the school setting (Walden 2015). Instead of generic, unremarkable hallways that create a half-public space in schools, they should consist of distinctive areas like islands, pits, and grandstands that structure spatially particular school spaces. This may enhance the sense of belonging between students and their school as a learning organisation, consequently boosting student engagement, defined as 'energy in action' and the correlation between individuals and activities (Frydenberg et al. 2005; Appleton et al. 2006: 428). The objectives are often developed collaboratively through a participatory process that involves various stakeholders, such as educational administrators, politicians, teachers, architects, engineers, researchers, residents, parents, and students. School buildings are expected to reflect both sociopolitical ambitions to be at the forefront of global development in a changing world and the role of a local community centre in their neighbourhood (Sigurdardóttir, Hjartarson 2011). Thus, the most significant development in modern school design is more intellectual than visually prominent.

#### **4. The case study**

The subject of this study is the Józef Kluza State High School of Fine Arts in Cracow. It is a remarkable school for establishing a school community with a rich artistic tradition and for having a unique modernist building whose architecture refers to the best international models. It would be difficult to find another school

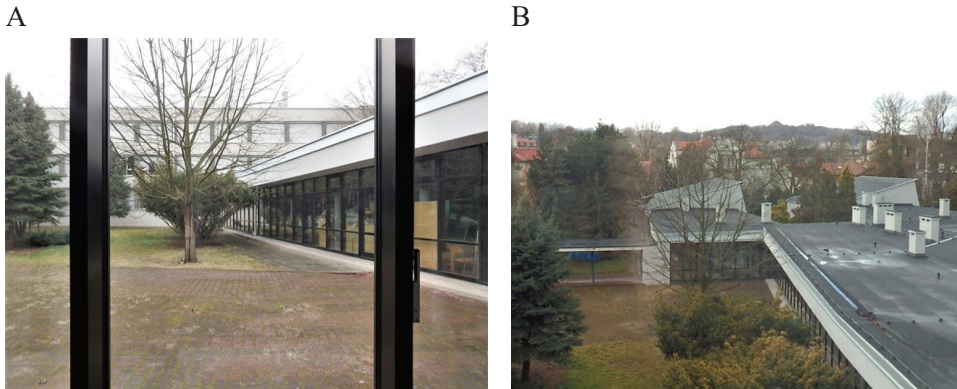
of this kind in the entire metropolitan area of Cracow, and choosing this particular school to study is not accidental and is closely related to the theoretical research presented in the work.

The school was founded shortly after the end of the Second World War, in December 1945, and was initially located in an apartment building in the midtown of Cracow. In 1955, Jozef Kluza, a painter, assumed responsibility as director of the school. He initiated a new school building design based on the modernist Bauhaus model. Architect Józef Gołąb headed a team,<sup>2</sup> which included architect and interior designer Teresa Lisowska-Gawłowska and structural designer Zbigniew Jankowski, to carry out the project. The State High School of Fine Arts's new building at 6 Mlaskotow Street (the school's current seat) had its grand opening in October 1967. In 1969, the building received the title 'Mister Cracow' for its architectural achievement. Since 1997, the position of school director has been held by the graphic artist Malgorzata Holowka, and since 2004, the school has been named after Józef Kluza. The Minister of Culture and National Heritage supervises the school. The school's curriculum covers art-related subjects such as art history, drawing and painting, basics of design, sculpture, and photography, and the obligatory program of general subjects. The school underwent renovations and re-equipping in 2020.

The school building's design drew inspiration from Herbert Read's (1943) *Education Through Art*, a book that not only espoused educational ideas inspired by art but also included a comprehensive account, plan, and pictures of a school in Impington (UK), designed in the 1930s by Walter Gropius and Maxwell Fry, that was a model in many respects for that era. This design, outlined in Read's book, is a prototype for an environmentally-focused school that merges educational offerings for students with the local community's goals. Despite the school's rural setting in the British countryside, it was marked by creative aspirations and a modernist spirit. One of its two designers was Walter Gropius, creator of the iconic Bauhaus school building and its famous professor and later dean of the Graduate School of Design at Harvard University. The school's design in Cracow repeats several characteristics of the school architecture described above. It employs a horizontally extensive and fractured plan, with pavilions housing the classrooms extending beyond the main body. Additionally, it uses a spacious hall, referred to as 'a promenade' in Gropius and Fry's design, which connects different parts of the building and serves as the school's shared space. Finally, the design incorporates an extensive green space that surrounds and intertwines with the main body of the building. The green space contains additional recreational spaces and a garden integrated via outdoor canopied walkways (Fig. 1).

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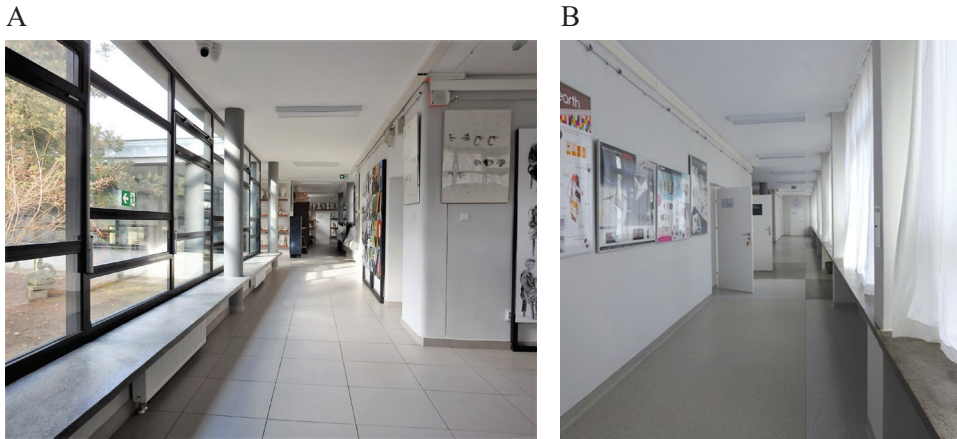
<sup>2</sup> The most complete list of the building's designers, based on information obtained from the City Archives, is provided by Malgorzata Włodarczyk (2007). The design team representing "Miastoprojekt" included: Józef Gołąb (leading designer), Izabella Miczyńska, Franciszek Prochal, Bolesław Kapalka, Bolesław Prochner, L. Przybyło, Tadeusz Srebnicki and Zbigniew Jankowski.



**Fig. 1.** The Józef Kluza State High School of Fine Arts in Cracow: A – the central courtyard and a block of classrooms as seen from the school's first-floor hall; B – the wing of art studios as seen from one of the classrooms on the top floor (the author took photos in February 2020)

In addition to the fundamental assumptions of the building's architectural concept and the school's idea, the design of the Art High School in Cracow included more references to the modernist vision of the school and the ideas of educational reformers than to the regulations that were commonly used in Poland at the time of the school's construction (the 1960s) and related to the idea of 'a thousand schools for the Polish millennium' (Wałaszewski 2018). The school's features encompass its scale, bespoke architectural design, customised interiors and furniture, and unique location in an inner-city villa district of Cracow, proximate to the expansive green area of Blonia. In terms of size, the school was designed for around 200 students, the number present during the research conducted at the school. This size corresponds to that recommended by Dewey and is much smaller than the average size of schools implemented in Poland at the time. The school's design considers a differentiated curriculum, with various parts of the school adapted to this curriculum. This idea aligns with the functionalist approach to architectural design that defined the earlier modernist era, seen in the Bauhaus school in Dessau, designed by Gropius in 1926. In keeping with this spirit, the first floor was spacious and functional, accommodating a wide range of programs, while the second floor was a repetitive, boxy block of mostly small classrooms. Meanwhile, on the first-floor level, around the central courtyard, there is a wing of art studios arranged in individual pavilions surrounded by greenery, a block of administration and auxiliary functions containing, among other things, a canteen, a library, and a space for students' lockers. The vast hall – a 'promenade' located across from the school's main entrance- showcases various items, including original furniture designed for the school and artworks representing the school's heritage (Włodarczyk 2007). On the upper two levels, there are classrooms for teaching general subjects and smaller art studios, all offering nice views of the green area, as well as a teacher's room, student bathrooms, small recreational annexes, and long and narrow corridors connecting all these spaces (Fig. 2).





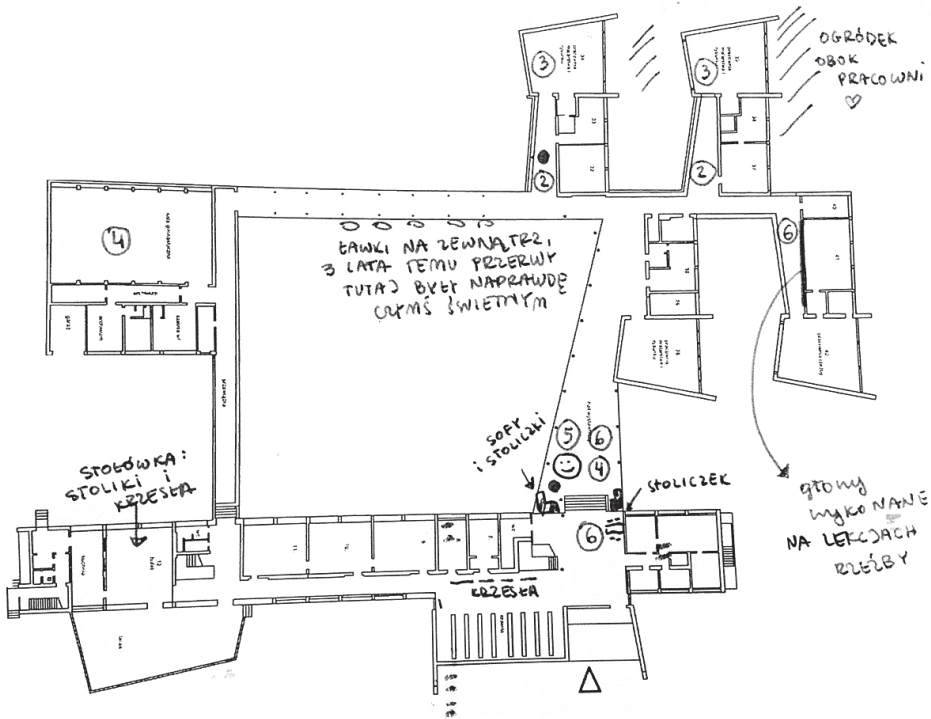
**Fig. 2.** The school semi-public space: A – the corridor circulating the central courtyard on the first floor; B – one of the upper floor corridors connecting the classrooms (the author took photos in February 2020)

## 5. Method

The research described herein started in 2019 from consultations and agreements with the school principal, followed by a photographic inventory, preparation of school plans based on available materials, and elaboration of a questionnaire in 2020. The culmination of the research performance was a survey of students' opinions on the use of school space, which was done in the fall of 2020 during the short period of resumption of stationary school operations during the COVID-19 pandemic. The survey's preparation and implementation faced obstacles during this period due to the suspension of in-person schooling in the summer semester of 2019/2020 and subsequent school closures, making survey administration and collaboration quite tricky. In 2021–2022, after additional consultations with one of the teachers involved, the data gathered through the survey was analysed and described.

The school survey was conducted with the written consent of the school administration and the approval of the teachers of the relevant classes. A total of 167 students ( $N = 167$ ), representing approximately 70% of the student body, participated in the survey. All classes except first grade were included; the students who completed the surveys were aged between 15 and 19 and were primarily female. The participants completed the survey in class during parenting lessons, and the class teachers handled the coordination process. The study was carried out by distributing paper questionnaires to the school. A total of 175 questionnaires were filled in by students from different classes (including 167 that were filled in completely), all of which were returned by the school soon after.

The research instrument was a questionnaire consisting of five different parts: (a) general information about the respondent (age, gender, grade); (b) a drawing part (Fig. 3) – mapping essential places on the school plans (including frequent places, favourite places, important elements of the school's spatial arrangement); (c) characteristics of the most favourite place of one's own school – closed questions and a list of adjectives to be filled in; (d) general evaluation of the school – closed and open questions; (e) emotional attitude towards the school – closed and open questions. The survey results were analysed using quantitative analysis (closed-ended questions), summary behavioural maps (results from the drawing component), plan analysis, and content analysis (open-ended questions). A summary of the variables utilised in the research is presented in Table 1.



**Fig. 3.** Example of a student's drawing statement on the first-floor plan of the school. The plan depicts the following: the student's preferred location marked with a happy face (☺), frequently visited areas marked with a single dot (•), locations that encourage interaction with teachers labelled as (2), areas that foster creativity labelled as (3), places suited for teamwork marked as (4), spots conducive to socialising labelled as (5), areas designated for relaxation labelled as (6), and subjectively significant elements of the spatial arrangement depicted through drawings

**Table 1.** *A description of the variables –*

1	<b>Overall Assessment of School Architecture</b>	<p><b>1.1. Evaluation of Individual Qualities of School Architecture – 7-Point Scale (From 1 to 7)</b></p> <ul style="list-style-type: none"> <li>– Aesthetics: attractive – ugly</li> <li>– Ambiance: friendly – unfriendly</li> <li>– Comfort: comfortable – uncomfortable</li> <li>– Interior design: well-arranged – poorly arranged</li> <li>– Equipment: well-equipped – poorly equipped</li> <li>– Organisation: orderly – chaotic</li> <li>– Space: spacious – cramped</li> <li>– Appeal: inviting – uninviting</li> <li>– Character: with character – nondescript</li> <li>– Location: well-located – poorly located</li> <li>– Connection to Environment: well-connected – poorly connected to the environment</li> <li>– Learning: conducive – not conducive to Learning</li> <li>– Creative work: conducive – not conducive to creative work</li> <li>– Social contacts: conducive – not conducive to social contacts and cooperation</li> </ul>
2	<b>Meaning of Places</b>	<p><b>1.2. Evaluation of Strengths (+) and Weaknesses (–) of the School Building</b> (open statements – content analysis)</p> <hr/> <p><b>2.1. Frequent Places</b> (places of frequent stay marked on school plans – drawing part)</p> <hr/> <p><b>2.2. Places Corresponding to Student’s Individual Needs at School</b></p> <ul style="list-style-type: none"> <li>1: A place conducive to <i>individual study and work</i> (in silence and concentration)</li> <li>2: A place conducive to <i>interaction with teachers</i> (listening, following instructions, and discussion)</li> <li>3: A place conducive to <i>creative work</i></li> <li>4: A place conducive to <i>teamwork</i></li> <li>5: A place conducive to <i>socialising</i></li> <li>6: A place conducive to <i>relaxation</i></li> <li>7: A place conducive to <i>privacy</i></li> </ul>
3	<b>One’s Favorite Place</b>	<p><b>3.1. Practical Significance of One’s Favorite Place</b></p> <p><i>In your favourite place, you are most often engaged in:</i></p> <ul style="list-style-type: none"> <li>– Individual work and studying</li> <li>– Following the teacher’s instructions</li> <li>– Creative work</li> <li>– Teamwork</li> <li>– Socialising</li> <li>– Relaxation</li> </ul> <hr/> <p><b>3.2. Individual Description of One’s Favorite Place</b></p> <p>List of Adjectives* (according to Hershberger, 1992) to check and implement</p>

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4 **Emotional  
Attachment**

**4.1. School Attachment Scale**

- *School is my second home, and I am very attached to it*
  - *I like coming here*
  - *It is an OK place*
  - *I am not very fond of it*
- 

**4.2. Free Statements about School** (unfinished sentences method):

*I believe that the building of my school .....*

*When I think of my school .....*

*When it comes to my school, my dream is .....*

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## 6. Results

### 6.1. Evaluation of the school's performance

The school's functional evaluation yielded strong results, with rankings scoring between 1 and 4 out of a 7-point scale (where 1 represents the highest quality and 7 is the lowest). The following list indicates the rank order of evaluated school building qualities from highest to lowest that is: 'spacious' – 1.74, 'conducive to creative work' – 1.78, 'aesthetically attractive' – 2.12, 'with the character', 'connected to the environment' – 2.20, 'supporting social contacts' – 2.24, 'friendly' – 2.37, 'comfortable' – 2.38, 'well arranged' – 2.47, 'well-located' – 2.54, 'conducive to learning' – 2.58, 'well-equipped' – 2.70, and 'orderly' – 2.77. Content analysis of the school building's strengths and weaknesses revealed the main topics of the students' interests. The most appreciated building qualities were *ex aequo* the 'main hall'/a 'promenade' (Fig. 4) and the 'natural light', mentioned by 46% of participants. Other important strengths were: 'atrium' (schoolyard) – 26%, 'architecture' or building's 'appearance' interchangeably – 26%, 'art studios' – 24%, and overall 'artistic atmosphere' – 19%. Less frequently mentioned issues but more than once were: toilets (renovated), soft furniture to seat and windowsills on the first floor (allowing to seat), lockers, kettle in the cafeteria, and bicycle stands. On the other hand, the most significant drawback of the building was the temporary closure of school facilities due to the pandemic (and earlier renovation works). Specifically, the inoperative 'cafeteria' accounted for 33% of the mentioned problems and the inaccessible 'atrium' (schoolyard). Students often mention the absence of student-centred spaces for individual study, rest, or socialising. Approximately one-third of participants (30%) reported experiencing these issues. Other important, frequently mentioned issues were: classrooms' 'equipment' – 18%, 'lack of colours' – 16%, 'temperature' (too cold in the winter time) – 11%, the lack of building's adaptation to the needs of disabled people (missing lift) and LGBT students (toilets) interchangeably – 10%, 'too small classrooms' – 7%, and 'too narrow corridors' in the classrooms' block – 7%. Other issues mentioned by more than one person as drawbacks were noise, original elements of interior design (e.g., old furniture and

old curtains), inadequate technical infrastructure (internet and power outlets), and waste segregation bins. Over a dozen students reported psychological issues related to their perception of the school's atmosphere, citing a 'depressing mood', 'sterile' or 'cold' interiors, classrooms lacking private areas ('too small for anything beyond following teacher instructions'), and a dearth of 'living elements' such as plants or flowers in the school's interior.

A



B



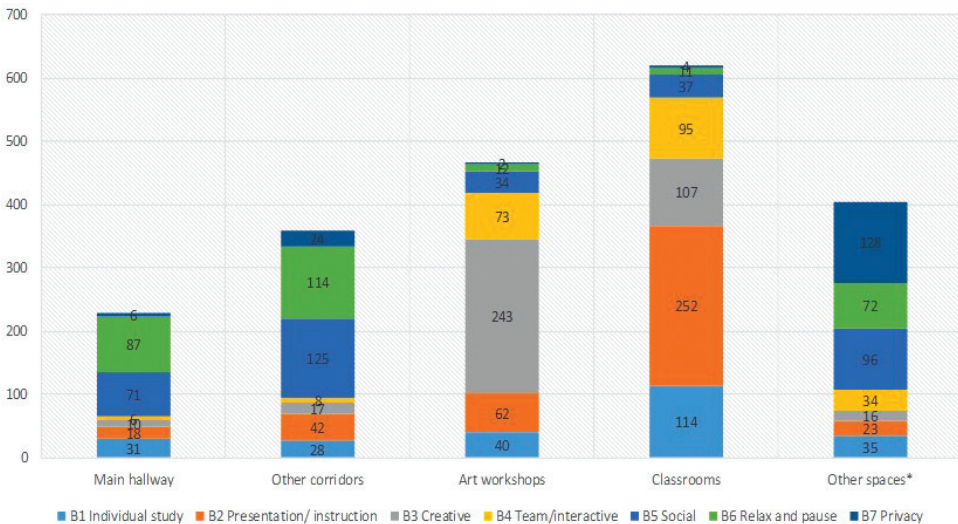
**Fig. 4.** The school's main hall: A – the sculptural tree that is an artwork piece of the original school interior; B – a fragment of the promenade exhibiting the students' current works (the author took photos in February 2020)

## 6.2. Meaning of places

Students' analysis of the plain architectural layouts provided by the questionnaire began with sketching essential elements of the school's arrangement. Supplementing 'missing' components yielded two principal elements: symbolic ones, linked to the school's identity, and functional ones, associated with the student's daily routines. An example of a symbolic 'missing' element is a sculptural tree in the centre of the main hall and the fountain in the centre of the atrium (which was temporarily out of order during the survey). These two elements have a historical significance for the school, and both are present in archive photographs from the school's official opening in 1967. They occupy the school's ritual spaces, the main hall and the atrium; elements frequently mentioned by students and the school community. Many students identified artworks and exhibitions within the school plans that could belong to ritual and daily realities. Functional elements added to the schematic questionnaire plans were in shared spaces, such as the main hall, corridors, and outdoor facilities. The additions primarily consisted of seating areas (chairs, armchairs, benches – including outdoor benches – and tables), vending machines, a sunny place, a piano in the main hall, bicycle stands, and even car parks. Some students also marked elements of the natural surroundings, such as trees. Quite a lot of students added items that do not exist but that they would probably like to have; most of these suggestions, except

for the shop (located a few times on plan next to the cafeteria), were located in outdoor spaces, and they consisted of: sports and playground facilities, a swimming pool (instead of or next to the fountain), and even a botanical garden or an orchard.

The summary behavioural maps, using information obtained from the questionnaire (2.1.), showed that the main hall and locker area (entrance hall) were the most frequented areas by students, as noted by over 50. The second set of commonly frequented areas included an art studio (specifically a painting classroom), one of the classrooms on the first floor, a first-floor corridor, and the seating area on the top floor; over 25 students identified these locations. Other frequently visited spots were a top-floor corridor, additional classrooms and art studios, and the cafeteria. The study of the subjective importance of school places was carried out by analysing the spatial distribution of places of particular importance (2.2.) for students concerning the functional scheme of the school building. The corresponding diagram (Fig. 5) presents the results of this analysis.

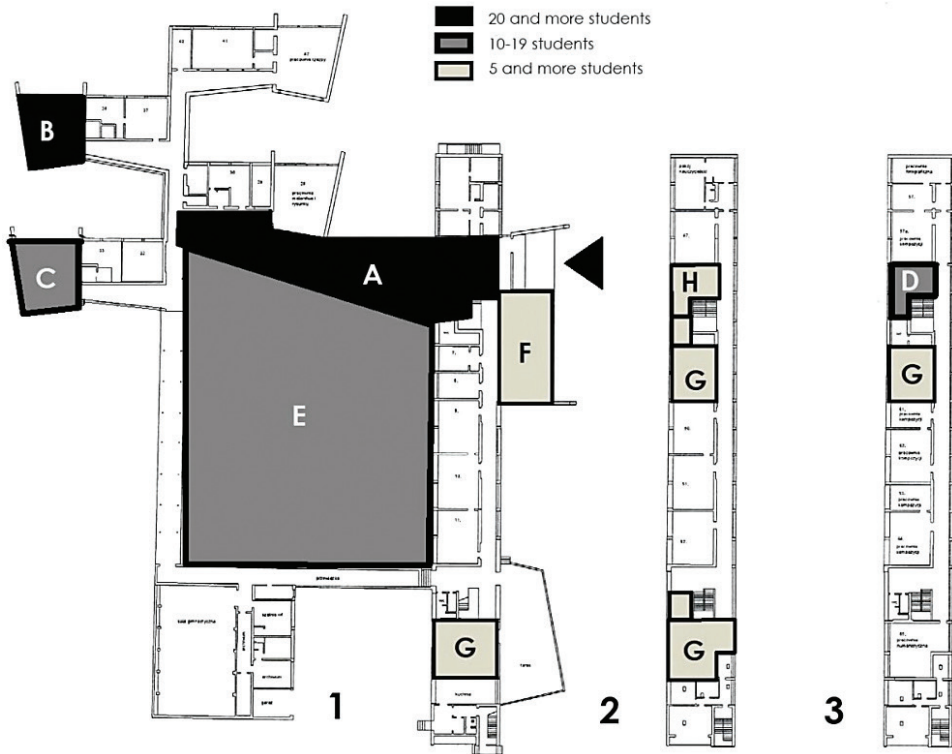


**Fig. 5.** The diagram presents the frequency of indicating places of particular meaning (seven categories in question – 2.2.) in relation to the five functional zones in the school building

### 6.3. Favorite places

The students' favourite places in the school building were revealed by analysing the spatial distribution of these places marked on the plan drawings in the questionnaires. As it turned out, these places were usually among the places where students spent most of their time. This map appears to be quite similar to the map of students' most frequent locations, except that it omits less distinct locations in the school that are frequently used – such as corridors in the classroom block. The spatial distribution of students' favourite places is shown in a summary

map (Fig. 6). The students' most favourite places in the school building were the main hall and one of the painting/drawing classrooms, followed by the top floor seating area, the other painting/drawing classroom, and the atrium. Additionally, the cafeteria and lockers zone on the first floor, the seating zone on the second floor, and some classrooms, including the art history classroom on the second floor, were also preferred places.



**Fig. 6.** Summary map of students' most favourite places in the school building: 1 – first floor; 2 – second floor; 3 – third floor; A – the main hall – a 'promenade'; B, C – two of the art studios (painting and drawing workshops); D – top floor students' relax zone; E – courtyard; F – lockers zone; G – selected classrooms; H – first-floor students' relax zone

Students' favourite places were associated with specific activities according to question 3.1. (Table 1). These activities included: socialisation (56%), relaxation (54%), creative work (39%), individual work and study (17%), following teacher directions (9%), and teamwork (4%). Individual descriptions of places, utilising the adjective list (3.2), were classified into four types of mood according to the affective quality of places model (Russel, Lanus 1984) that is (1) unstimulating/boring, (2) tranquil/restful, (3) exciting, and (4) tense. Notably, most students' favourite place descriptions fell under the second type of mood, categorised as 'tranquil/restful'.

However, some differences were observed in the number and type of descriptions of spaces depending on the type of activity linked with those places. For example, students who chose the places where they cooperate within a team (the most rarely chosen type of activity in preferred places) used the most considerable number of adjectives ( $M = 16.7$ ) that also belonged to all four moods. On the contrary, individuals who selected a location for relaxation utilised the fewest adjectives in each category ( $M = 10.17$ ). The highest number of 'stimulating' adjectives were employed to portray locations for teamwork or to comply with teachers' directions. Locations for social activities were described similarly to relaxation spots, except for the 'exciting' category of adjectives.

#### **6.4. Emotional relationship vs. identification with school goals and use of school space**

A sense of pride and attachment to the school as a place and institution is evident in the statements of numerous students. It was claimed by the average quantitative results of the students' self-rating of their attachment to school (4.1.). On a scale of 1 to 4, with 1 indicating the lowest attachment to school ('I am not very fond of it') and 4 indicating the highest ('School is my second home, and I am very attached to it'), the mean scores were close to the highest level ( $M = 2.78$ ,  $SD = 0.80$ ). As the quantitative results showed, the emotional attachment to school measured this way was related to evaluating the school's fundamental goals. Students who reported the highest attachment to school ('4') also rated the school highest in terms of promoting learning ( $M = 2.04$ ), creative work ( $M = 1.29$ ), and social contact ( $M = 1.43$ ). As an attachment to school declined, so did the average school ratings on each dimension. For example, students who rated their attachment to school at the lowest level ('1') rated the functioning of the school the worst in terms of promoting learning ( $M = 3.73$ ), creative work ( $M = 3.27$ ), and social contacts ( $M = 3.64$ ). An increase in reported school attachment correlated with the number of places on the school plan marked by the students, including both frequently visited areas and personal favourites. However, it is somewhat puzzling that an increase in school attachment resulted in fewer marked places of each type on the school plan.

Content analysis of students' free statements about the school (4.2.) sheds light on the climate of student perception of the place. Examples of the most typical statements made by students in addition to the proposed unfinished sentences are summarised below:

I believe that the building of my school ...: ... 'is beautiful, and I'm proud to study here'; ... 'it's much better than any other school building'; ... 'is tasteful and interesting, but it feels too cold and austere'; ... 'it's nicer than the typical school, very unique but lacking colours, and very clean'.

When I think of my school, these are the things that come to mind: ... 'Bauhaus'; 'art classrooms with big windows that let in plenty of light, creating a sunny, bright atmosphere'; 'a psychiatric hospital with large windows'.



When it comes to my school, my dream is: ... 'to have a functioning cafeteria'; 'comfortable and peaceful areas'; 'a larger gym'; 'comfortable seating'; 'an elevator and water in the atrium'; 'I also wish for more open spaces, with the additions of paintings and sculptures in rooms like the cafeteria'; ... '...additionally, I would like to see the atrium and shop opened up, and a designated smoking area established'; ... 'fewer people in the classrooms', 'the return of the old colourful walls and red columns in the hallways'; ... 'I also suggest providing chairs with cushions for added comfort'.

## 7. Discussion

A survey conducted at the High School of Fine Arts in Cracow with the participation of most of the student body revealed that students generally hold a favourable and high opinion of their school's architecture. It also showed that the students have emotional connections to the building, which is demonstrated not only in forming individual subjective opinions about the school building but, more importantly, in cultivating individual, distinct relationships with specific areas of the school campus. These spaces, identified by the participants, cater to a range of student needs in school. They serve as areas for relaxation, rejuvenation of attention, immersion in nature, stimulation, fulfilment of the need for privacy, and fostering social connections. All of these types of relationships between students and school space are fundamental concepts of the new pedagogy of school space, and they are also critical elements of students' daily routines.

Delineation of the survey results needs to emphasise the school's 'artistic atmosphere' as perceived by the students and its role in cultivating creativity and artistic output. The students have expressed their admiration for the art studios, sunlighting, the school's natural surroundings, and the art exhibitions and displays rooted in the school's tradition and culture. The survey respondents generally hold views similar to those of the school community and contemporary architecture critics regarding the school building. Most would likely agree with the 1960 press article, which described the building as 'magnificent' and 'thoroughly modern (...) with sunlit rooms and perfect facilities for future artists' (Włodarczyk 2007). Most of the students participating in the survey would probably also agree with the opinion of contemporary architecture critics that the building is 'beautiful' and its functional scheme is 'well-thought' (Włodarczyk 2007). Many students would likely concur with the same author's claim that the school's architecture resembles a 'bygone era'. However, based on information from student statements in 2020, not all of them would agree that this school atmosphere is always suitable and ideal, despite what this author suggests. Indeed, the survey reveals that students appreciate the building due to their artistic education and plastic sensibilities. However, they do not appear to exert significant influence over its shape. Several statements about the museum-like building's monumental and 'sterile' nature suggest this. Curiously, the building's 'order-chaos' parameter is rated lower than other qualities. This may indicate an

incomplete sense of order following recent renovations. Alternatively, perhaps, on the contrary, a low rating on this scale indicates an over-ordered space, as some of the students' casual statements would suggest. It is also relevant here to draw attention to the issue of the aesthetic sense as a sense of distinction, as discussed by Bourdieu (2005: 75):

Tastes and colors are not open for debate: not because everyone has their own taste, but because each taste believes that it is founded in nature – it is a habitus; as a result, it rejects others as a scandal of degeneration. Aesthetic intolerance exerts terrible violence. (...) And for those who consider themselves possessors of legitimate taste, the most unbearable thing is, above all, the sacrilegious combination of such tastes that taste commands to be separated. This means that the games of artists and aesthetes seeking to gain a monopoly on artistic legitimacy are far less innocent than one would think. There is no struggle for art whose stakes would not also include the imposition of a certain art of living, that is, the transformation of a way of life into a legitimate kind of existence that rejects all other ways of living as arbitrary.

Another issue identified in the research is the disparity between achieving the objective of artistic education, which includes adapting the building to the artistic activities of the school (which are generally highly valued by the students), and other educational objectives, which include, in particular, adapting the building to provide opportunities for individual and team study and work, socialisation, and the provision of temporary isolation and private accommodation for students. This is supported by the students' evaluations of the advantages and disadvantages of the school's facilities, along with an analysis of the content of the third of the unfinished sentences that begins with the words '*When it comes to my school, my dream is ....*'. The statements that complete this phrase are basically a wish list that stems from the perceived lack of spaces dedicated exclusively to students. These statements are reinforced by the fact that students rate the overall amount of space in the school favourably. However, according to students, adequate space is primarily found in the representative and entrance areas of the school, mainly on the first floor of the building. Meanwhile, a typical school construction – a two-story block with classrooms and adjacent corridors – is perceived as too cramped, small, and narrow by the majority of students. This spatial disparity has to do with location on one floor or another or in a particular functional wing and, above all, with a specific imbalance. The students seem to perceive a lack of current solutions reflecting social and environmental justice, as evidenced by some partially quoted opinions. They also seem to sense the imbalance between the ceremonial and the casual, between what is on the main stage or behind the scenes, between what is associated with official education and fixed architecture, and what is informal self-learning and provisional spatial improvisations.

To fully comprehend the outcomes of this case study, it is imperative to consider the local context and cautiously interpret these findings while being aware of unavoidable limitations. One of these restrictions pertains to the distinctive features of the school, such as its rich artistic tradition and culture, and the monumental style

of its modern architecture, which all students are educated about. Another source of limitation is the historical moment during which the research was conducted at the school. This was shortly after the school had been thoroughly renovated, in keeping with the spirit of modernism, but also slightly moderating some of the original architectural features, such as colours – in the original interior design with simple Bauhaus style colours like light blue and red – now replaced by overwhelming white and light grey. It was also a significant moment during the COVID-19 pandemic. Students who took part in the survey were attending school after a prolonged break, which could have affected their views about the school by adding some sentimental attachment to an idealised image of the school or, conversely, leading to excessive expectations towards it.

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## SPIS TREŚCI / TABLE OF CONTENTS

<b>Julita Czernecka, Darlane Andrade</b> – Single people in Poland and Brazil on social isolation: Living situations .....	5
– Single w Polsce i Brazylii w izolacji społecznej: sytuacje życiowe	
<b>Agata Żółtaszek</b> , Modern crisis of youth mental health – the perspective of Poland .....	23
– Współczesny kryzys zdrowia psychicznego młodzieży – perspektywa Polski	
<b>Ewelina Stasiak</b> – The tenure of the local executive tenures on the example of local government elections in the Łódź voivodeship .....	45
– Kadencyjność władzy wykonawczej na przykładzie wyborów samorządowych w województwie łódzkim	
<b>Wojciech Mincewicz</b> – Badanie społeczności internetowych: nowe wyzwania dla badacza ....	61
– Researching online communities: New challenges for the researcher	
<b>Paweł Taradejna</b> – Pomiędzy protorasizmem szlacheckim a rasizmem naukowym. Studium porównawcze praktyk urasawiania <i>Innych</i> na przykładzie polskich chłopów pańszczyźnianych i Afroamerykanów .....	77
– Between gentry proto-racialism and scientific racism. A comparative study of the practices of oppressing <i>Others</i> on the example of Polish serfs and African-Americans	
<b>Natalia Izydorzycyk</b> – Gender socialisation and perception of gender by non-heteronormative people .....	91
– Socjalizacja płciowa i postrzeganie płci przez osoby nieheteronormatywne	
<b>Angelika Lasiewicz-Sych</b> – School architecture, its adaptability and forms of student's life at school: A case study of the Art High School in Cracow .....	101
– Architektura szkoły, jej adaptabilność i przejawy życia uczniów w szkole: studium przypadku Liceum Plastycznego w Krakowie	



**Julita Czernecka, Darlane Andrade**, Single people in Poland and Brazil on social isolation: Living situations

**Agata Żółtaszek**, Modern crisis of youth mental health – the perspective of Poland

**Ewelina Stasiak**, The tenure of the local executive tenures on the example of local government elections in the Łódź voivodeship

**Wojciech Mincewicz**, Badanie społeczności internetowych: nowe wyzwania dla badacza

**Paweł Taradejna**, Pomiędzy protorasizmem szlacheckim a rasizmem naukowym. Studium porównawcze praktyk urasawiania *Innych* na przykładzie polskich chłopów pańszczyźnianych i Afroamerykanów

**Natalia Izydorczyk**, Gender socialisation and perception of gender by non-heteronormative people

**Angelika Lasiewicz-Sych**, School architecture, its adaptability and forms of student's life at school: A case study of the Art High School in Cracow