

INTERDISCIPLINARY

The Emotional Nexus
Recovery Model for
Addiction

More's Utopia:
Architectural Design and
Politics

Ethics vs Morality in Human
Action & Bioethics

Sanga Ilakkiyam (Tamil), Rig
Veda, Mahabharata...

Discovering Thoughts, Inventing Future

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PREFACE

The Global Journal of Human-Social Science (GJHSS) is pleased to present this issue, bringing together a curated collection of high-quality research papers that explore diverse dimensions of human society, culture, and the social world.

This issue features research spanning topics including arts & humanities, sociology, history, anthropology, economics, political science, linguistics, education, and interdisciplinary social inquiry. Each paper has undergone a rigorous double-blind peer-review process to ensure scholarly rigor and originality.

We would like to express our sincere gratitude to the authors for entrusting their research with us, to the reviewers for their thorough and constructive evaluations, and to our readers for their continued engagement with the academic discourse.

We hope that the research presented herein inspires further inquiry and contributes meaningfully to the advancement of knowledge in the human and social sciences.

The Chief Editor
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Centring Emotion in Addiction: The Emotional Nexus Recovery Model

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Abstract

Addiction is increasingly understood as a condition shaped by interconnected biological, psychological, social, and spiritual elements that contribute to its onset and persistence. Although various treatment and recovery models demonstrate some success in reducing substance misuse and promoting abstinence, they often give little attention to the role of emotional experiences, particularly shame. This discussion examines the importance of recognizing emotion, with an emphasis on shame, in the addiction recovery process, advancing the understanding that addiction serves a purpose in reducing emotional suffering and fostering survival. The Emotional Nexus Recovery (ENR) model integrates biopsychosocial-spiritual and emotion-focused frameworks to promote a holistic understanding of addiction that positions emotion as a central guide in the recovery process. Limitations of the model and directions for future research are discussed.

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Centring Emotion in Addiction: The Emotional Nexus Recovery Model

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Addiction is increasingly understood as a condition shaped by interconnected biological, psychological, social, and spiritual elements that contribute to its onset and persistence. Although various treatment and recovery models demonstrate some success in reducing substance misuse and promoting abstinence, they often give little attention to the role of emotional experiences, particularly shame. This discussion examines the importance of recognizing emotion, with an emphasis on shame, in the addiction recovery process, advancing the understanding that addiction serves a purpose in reducing emotional suffering and fostering survival. The Emotional Nexus Recovery (ENR) model integrates biopsychosocial-spiritual and emotion-focused frameworks to promote a holistic understanding of addiction that positions emotion as a central guide in the recovery process. Limitations of the model and directions for future research are discussed.

Keywords: *addiction, biopsychosocial-spiritual, Canada, emotion, recovery, shame, treatment*

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1. Introduction

It is estimated that, worldwide, half the adult population uses psychoactive drugs on a regular basis, far more if caffeine is included in the totals. In Canada, adult drug use from 2007 to 2020 remained relatively steady with two major exceptions: cannabis and opioids. Alcohol remained the most commonly used psychoactive agent, with approximately three-quarters of those 15 years of age and older using the drug annually. Not surprisingly, given the change in status from illicit to legal in 2018, cannabis has seen the greatest increase in reported use in the 21st century within Canada, with nearly one in five adults indicating using the drug at least once in 2020 (Canadian Substance Use Costs and Harms Scientific Working Group, 2023). Interestingly, cannabis misuse has decreased (McDonald et al., 2025), however this has not prevented cannabis from becoming the leading cause of psychoactive-related hospital admissions among youth (Canadian Institute for Health Information, 2026). Despite a far lower rate of use than either alcohol or cannabis, the drugs that have received the most media and political attention have been opioids. Taking into account population size, North America continues to have the greatest rate of illicit opioid use globally, approximately 4% of the population (Csiernik, 2026). The influx of opioid prescriptions beginning with the introduction of oxycontin in 1999 created an opioid dependence epidemic in Canada, with a 24% increase in opioid prescriptions between 2010 and 2014 alone (Eibl et al., 2017). Between January and March 2025, Canada experienced a reported 1377 opioid deaths (Government of Canada, 2025). It has been estimated that the cost of substance use to Canadian's is more than \$49 billion annually and leads to over 200 lives lost per day

(Canadian Substance Use Costs and Harms Scientific Working Group, 2023). Likewise, overdose deaths in the United States have reached unprecedented levels as between June 2022 and June 2023, over 106,500 individuals alone died with opioids being the primary driver of fatalities (Centers for Disease Control and Prevention, 2023). Neither substance misuse or the opioid crisis is an issue only in North America as opioid misuse is a major problem in public health worldwide (Health–Americas, 2023).

2. Foundations of addiction

It has been well established that addiction has several distinct interconnecting elements (Csiernik, 2026; Csiernik et al., 2023). Notable biological factors responsible for the commencement and continued use of substances include genetics, chemical and hormonal imbalances, physical health, nutrition, sleep and the impact of withdrawal (Yazici & Bardakçi, 2023). By continuing to use substances, a tolerance to the psychoactive drug will often form, leading to the brain and the body requiring an increasing amount of the substance to remain in homeostasis (Csiernik, 2025). Additionally, psychological factors such as mental health, trauma history, cognitive processing, stress, and motivation have a connection to addictive behaviours (Yazici & Bardakçi, 2023). Not only do psychoactive agents move users away from their natural homeostatic level of anxiety, creating a sense of euphoria, but they also provide an escape from psychological turmoil (Fisher, 2022). Mental representations, if inaccurate, may lead to destructive thought processes, emotions, and behaviour, including substance misuse (Rakfeldt, 2023). The quality of social factors in an individual's life has been associated with reduced risk of relapse in

those recovering from substance misuse (Yazici & Bardakçi, 2023). It has been argued that substances may be used as a replacement, in some situations, for interpersonal connection and thus, social support and capital are deemed vital for recovery (Chen, 2022; Maté, 2021).

Viewing substance misuse as a behaviour that serves a functional purpose helps to conceptualize why people may continue to use substances even when it conflicts with their values. This inconsistency between behaviours and beliefs is referred to as cognitive dissonance (Festinger, 1957) and may lead to uncomfortable feelings of moral tension or conflict (Hashemi & Vogel, 2024). As people typically desire consistency in terms of their behaviours and values, those experiencing cognitive dissonance will often take action to reduce the discomfort it causes (Tse et al., 2022). The most common way of reaching cognitive consonance is by changing attitudes to be more consistent with current behaviours, rather than changing behaviours to be more aligned with attitudes (Harmon-Jones & Mills, 2019). Even so, cognitive dissonance is recognized as a powerful motivator for change within substance use behaviours, as some individuals will decide to change their usage to be align more with their values (Tse et al., 2022). Hashemi and Vogel (2024) identified that in circumstances where psychoactive substance use is normalized among peers, messages about moderation and harm reduction may be more acceptable than promotions of abstinence, as cognitive dissonance will prevent the acceptance of this rigid practice. While potentially helpful in motivating change, cognitive dissonance may also produce emotional reactions, leading to increased substance use, to avoid negative feelings or an alteration of value systems to support drug-using behaviours (Harmon-Jones & Mills, 2019; Tse et al., 2022). This is one reason why the emotional state of the individual is a critical aspect underlying the development, maintenance, and escalation of substance misuse to become an addiction.

Negative emotions have been linked to substance use in multiple understandings of addiction, including negative reinforcement, tension-reduction and social learning models (Batchelder et al., 2022; Peralta & Steele, 2010; Smith, 2021; Wilson 1988). Maté (2021) argued that addiction originates in pain, whether openly known or subconsciously. One reason for individuals beginning and continuing to use psychoactive substances is that drugs work, even if temporarily, in reducing feelings of emotional pain and suffering (Barnett, 2024). Individuals who use substances to avoid or relieve negative emotions have been shown to develop addictive patterns of use more quickly than those who reported other reasons for their administration (Wilcox et al., 2016). This avoidance of emotional experiences can lead individuals to lose their ability to be emotionally present, becoming, as Maté described, “emotional amnesiacs” (2021, p. 39). Emotional dysregulation then becomes even more prominent, and addiction more severe, as use continues (Wilcox et al., 2016). This has led to counsellors in this practice area advocating for the incorporation of emotion-regulation training and supports for those with addiction issues to improve overall well-being, by first understanding the purpose that substance use serves (Barnett, 2024; Chen, 2022). Additionally, attachment theory explains how early attachment to an emotionally present caregiver is vital to developing a healthy sense of self and the ability to regulate emotions (Ainsworth, 1973; Bowlby, 1958; 1982; Parolin & Simonelli, 2016). Substance use, then, instead of being internalized as a moral failing, is recognized as a learned behaviour used to suppress very real and unbearably painful emotional experiences (Barnett, 2024), while filling a void of lost connection (Maté, 2021). By identifying these experiences that lead to their

substance misuse, the individual is in a better position to learn to work with these feelings and develop alternative coping strategies (Barnett, 2024).

Even with a strong motivation to change behaviour, difficult experiences can lead to fluctuations in emotional arousal and a breakdown of cognitive processes (Barnett, 2024). This can manifest as either hyper-arousal or hypo-arousal. Hyper-arousal occurs when emotions feel as if they are flooding or overwhelming the body, leading to reactivity, while hypo-arousal is the logic system’s attempt to override this emotional process, leading to dissociation and shutdown (van der Kolk, 2014). Psychoactive drugs used to manage hyper- versus hypo-arousal aim to modulate the autonomic nervous system, either calming hyperarousal, the fight-or-flight state or stimulating an immobilized, numb state, hypoarousal. While individuals self-medicate using a range of substances stereotypically stimulants are used to address feeling of hypoarousal (Khantzian, 2003; Wagner, 2017) while depressants tend to be used to address hyperarousal (Dagan & Yager, 2020; Duranceau et al., 2014; Lader, 2011). Siegel (1999) proposed that between these two states is a window of tolerance where one is able to make accurate decisions and productively experience emotions. People with addiction issues are more likely to use their substance when outside of their window of tolerance as a way to manage overwhelming or underwhelming emotional experiences (Corrigan et al., 2011).

When outside of the window of tolerance, individuals cannot learn from their experiences and struggle to remain in control of their behaviours (van der Kolk, 2014). The limbic brain system works as an internal alarm to alert one to danger and will cause an individual to react in a way that will protect them from harm, making it vital to human survival (Csiernik, 2026; Maté, 2021). Within this context, substance misuse and addiction can be understood as a brain pattern developed for survival to protect an individual from emotional harm by dulling painful feelings (Maté, 2021; van der Kolk, 2014). Continued substance use causes further dysregulation of the limbic system, leading to minor adversities feeling overwhelming and unbearable to those with an addiction (Lin et al., 2024; Wilcox et al., 2016). This view moves us beyond the simpler disease model that was prominent in forming views regarding addiction in the middle part of the 20th century to the more comprehensive neurobiological theory of addiction. Additionally, by increasing awareness of emotional experiences, an individual can expand their window of tolerance to better navigate difficult life stressors and reduce time spent in survival mode. Through this, people with an addiction are better able to make rational decisions about whether or not they want to use substances, without the overwhelming emotional destabilization that occurs during hyper- and hypo-arousal states aligning with trauma-informed models of counselling and support (Barnett, 2024).

Another perspective, the self-medication hypothesis, views substance misuse as an adaptive tool of survival from overwhelming emotional suffering (Chen, 2022). Using substances as an avoidance strategy serves to protect the sense of self from situations that seem unlivable and is one example of how individuals will react in ways that seem maladaptive when faced with pain (Fisher, 2022). This implies that addiction is not a behaviour that exists outside of emotional experiences and is instead deeply interconnected and driven by them (Barnett, 2024). People with mental health concerns have an increased risk of addiction due to the impact some substances have in mitigating or relieving symptoms of mental health conditions (Lin et al., 2024). Thus,

individuals will do what they feel they need to in order to find or maintain some level of emotional safety and survive (Chen, 2022). Addiction overtakes the natural emotional survival system, leading to temporary feelings of safety through substance use, which makes one less equipped to navigate ongoing emotional turmoil without their substance of choice (Barnett, 2024).

3. Shame: An under-recognized contributor to addiction

Emotions are both a necessary and challenging component of human existence, forming an indispensable part of the sensory system and a vital component of who someone is (Maté, 2021). Hawkins (1995) introduced the emotional frequency chart, identifying a range of emotions based on his concept of power versus force. Low-frequency emotions require force, meaning that they are negative or life-reducing, while high-frequency emotions exert power and are considered positive or life-supporting. Hawkins identified shame, described as self-loathing and destructive energy, as the lowest frequency emotion that an individual can feel. The concept of shame has been a key element of many theories attempting to explain or provide insight into the development of an addiction, including the moral model, disease model, attachment theory, personality theory, humanistic theory, psychodynamic theory [object-relations], and social learning theory (Csiernik, 2026). Additionally, societal narratives and discrimination regarding addiction can lead those who misuse substances to internalize self-stigma. Stigma is additionally reinforced through structural and systemic barriers that exclude people with an addiction from the opportunity to recover (Chen, 2022; Fisher, 2022). Negative self-conscious emotions, such as shame, arise from an evaluation of the self in comparison to others and often lead to feelings of being less valuable or less worthy (Batchelder et al., 2022). Shame has been described as the most overwhelming emotional experience that one can face, as it attacks the very core of who that person is (Barnett, 2024). Those who feel shame then, either from their substance misuse or factors leading to or arising from it, continue to use substances as a way to self-medicate and avoid this emotion that has been deemed unbearable (Chen, 2022). Psychoactive substances effectively reduce the intensity of feeling these emotions, acting as a protective factor to facing emotional pain; however, this also results in a loss of the ability to engage in other activities or behaviours to overcome difficult life experiences moving forward, increasing an individual's reliance on the substance (Barnett, 2024).

The presence of shame and the temporary relief offered by substance use is often referred to as the shame-addiction cycle (Batchelder et al., 2022). Substance misuse and feelings of shame become cyclical in nature as the individual consumes drugs to sedate feelings of shame, which in turn increases feelings of shame for using substances (Chen, 2022). This shame associated with using substances has been linked to the idea of not being able to control one's desire to use, even when they wish to maintain abstinence (Chen, 2025). Additionally, avoidance of difficult emotions leads to increased feelings of fear about facing these emotions in the future, as one feels unprepared to do so. This increase in fear due to avoidance produces an increased likelihood of using substances, creating a cycle that is counterproductive to personal growth (Barnett, 2024).

There has been debate within the literature about the role that guilt plays in addiction and how this differs from shame (Batchelder et al., 2022; Chen, 2022). The key difference between

guilt and shame is the focus of the negative evaluation; shame can be conceptualized as a negative evaluation of oneself, while guilt is a negative evaluation of one's behaviour (Batchelder et al., 2022). Guilt has been argued as a potentially self-regulatory mechanism that can support people in decreasing substance use as they identify the behaviour, rather than themselves, as problematic, leading to desires to change. In contrast, shame is internalized as a personal deficit, and reparations may seem impossible or too abstract to be tangible (Chen, 2022). Batchelder and colleagues (2022) found that shame was consistently associated with increased substance use, while guilt was seen as associated initially with increased substance use, but potentially protective over time as substance use continued. Some researchers identify that both shame and guilt are connected to the development and maintenance of substance use concerns (Chen, 2022), while others describe shame and guilt as motivating factors for people using substances to engage in treatment (Jones et al., 2024). A negative association with self-forgiveness was identified for both shame and guilt, however a stronger association was present between self-forgiveness and shame (Hall & Fincham, 2005).

Since shame has been identified as playing such a significant role in addiction, there has been a search for strategies to mitigate its risks. Self-acceptance has been recognized as an important mechanism to address the cycle of shame within addiction and foster long-term recovery (Chen, 2022). Linehan (1997) defined the term 'radical acceptance' as the ability to feel painful emotions without needing to react to or change them. Only through the allowance and acceptance of difficult emotional states are individuals able to move toward changing their behaviour (Greenberg, 2017). Additionally, self-forgiveness and gratitude reinforce the recovery process and may be helpful in sustaining long-term recovery (Chen, 2025). Gratitude supports individuals in rebuilding helpful and supportive relationships and improving coping strategies (Nelson, 2009). Self-forgiveness, while identified as more difficult than other forms of forgiveness, provides individuals with an adaptive way to cope with difficult situations and emotions (Chen, 2025). Participation in 12-step mutual aid groups such as Alcoholics Anonymous or Narcotics Anonymous has been seen to foster self-acceptance, self-compassion, and gratitude (Chen, 2025), reduce shame (Chen, 2022), and reduce the risk of relapse in some individuals (Yazici & Bardakçi, 2023).

4. Treatment options

Given the complexity and multidimensional nature of addiction, a plethora of approaches to address the condition have been proposed. This includes a variety of common psychotherapy modalities that have been adapted to support those misusing substances who wish to abstain or reduce their consumption (Csiernik, 2026; Yazici & Bardakçi, 2023). Cognitive behavioural therapy (CBT) has significant literature supporting its use for people with substance use concerns, with an emphasis on identifying patterns in thoughts and behaviours that are associated with an individual's desire to use substances (Rakfeldt, 2023). Specifically, CBT for substance use focuses on challenging unhelpful or inaccurate mental representations and encourages active restructuring of these thoughts to increase an individual's ability to process their emotions effectively and thus, reduce harmful substance use behaviours. This approach views emotions as influenced by cognitions, understanding that challenging unhelpful thought patterns can help an individual feel better emotionally and thus, reduce substance use (Csiernik, 2026; Rakfeldt, 2023). Interestingly, one criticism of CBT is its lack

of direct focus on emotional processes (Leahy, 2015). Third-wave adaptations such as dialectical behaviour therapy (DBT) build on the initial concepts of CBT, with an added appreciation for self-acceptance and the ability to mindfully observe thought processes, without attempting to change them (Chen, 2022; Linehan, 1993; 2015). DBT and other contemporary models situate substance use as a learned behaviour that is influenced by environmental factors (Waldron & Kaminer, 2004). These approaches also contrast with CBT's strict focus on cognitions alone by using interventions that teach emotional regulation and distress tolerance, recognizing the importance of emotions for general well-being (Leahy, 2015).

The transtheoretical model (TTM), in contrast, was developed specifically for supporting individuals who identified as having an addiction (Prochaska & DiClemente, 1983). This revolutionary model argued that individuals will cycle through various stages in the process of attempting to change a behaviour, represented as a spiral with a mixture of positive change and setbacks along the recovery journey. Techniques used to support individuals are informed by their current state of change, and throughout the entire process, individuals are asked to reflect on the pros and cons of changing their behaviour and the impact this would have on their life (Prochaska, 2008; Prochaska et al., 1992; Prochaska et al., 1994). Within TTM, emotions are recognized as fluctuating throughout the therapeutic process, resulting in one's willingness to change their behaviours (Hodgins, 2001). Specifically, the concept of dramatic relief, which refers to the negative feelings one associates with their addiction and the subsequent relief one feels when these behaviours cease, is considered a central motivation of change within TTM (Hodgins, 2001). Associated and used in conjunction with the TTM, but developed independently, was the construct of motivational interviewing (MI). MI is a method of counselling often used in partnership with TTM to increase an individual's intrinsic motivation to change by utilizing attribution, empathy, self-efficacy, and cognitive dissonance (Miller & Rollnick, 1991, 2002, 2012). MI has been seen as effective in supporting clients who are described as ambivalent to change or stuck in addictive behaviours (Canadian Centre on Substance Use and Addiction, 2017). Resistance in MI is seen as an emotionally protective mechanism reflecting ambivalence about change (Miller & Rollnick, 2002, 2012). While emotion-focused concepts are utilized in both TTM and MI, they are not the central focus of either approach.

Emotion-focused and emotionally focused therapies have also gained popularity as psychotherapeutic models that can be used to support those with substance-use concerns or addictive behaviours, as well as their families (Barnett, 2024). In contrast to CBT and related cognitive-behavioural approaches, and TTM/MI, as the name suggests, the focus here is upon the emotional aspect of substance misuse. While often used interchangeably, emotionally focused therapy and emotion-focused therapy are considered distinct practices, specifically in regard to the population being supported (Greenberg, 2017). Emotionally focused therapy was developed initially as a couple's therapy approach to encourage the expression of underlying vulnerable emotions and foster a change in the way the couples interacted with and understood one another (Greenberg & Johnson, 1988). In 2015, Greenberg proposed that emotion-focused therapy is an integrative term which encompasses all treatments that centre emotion as the focus of their interventions. Emotion-focused therapy for addictions emphasizes the role that negative emotions play in the onset and maintenance of substance use (Barnett, 2024). This approach focuses on building emotional fluency and awareness, as well as

an understanding of addiction as an adaptive behaviour used to protect individuals from emotional suffering (Barnett, 2024).

It has been well established that addiction recovery requires a holistic biopsychosocial intervention strategy, as illustrated by the various treatment approaches discussed above, that can support individuals in developing and maintaining general well-being (Csiernik, 2026; Csiernik et al., 2023; Yazici & Bardakçi, 2023). Additionally, peer-run 12-step groups such as Alcoholics Anonymous and Narcotics Anonymous emphasize the importance of spiritual connection, with addiction being identified as a hybrid condition with physical, mental, and spiritual elements (Fisher, 2022). As an outcome of the increased awareness of the benefits of spiritual support, the biopsychosocial (BPS) model for wellbeing, developed by Engel in 1977, was expanded by Sulmasy (2002) to formally acknowledge the spiritual domain, becoming known as the biopsychosocial-spiritual (BPSS) model (Figure 1). Fisher (2022) identified that spirituality in recovery involves individuals letting go and putting trust in a purpose greater than themselves. Substance misuse in 12-step programs are regarded as spiritual disorders which are created through the absence of meaning to life (Chen, 2025). Some benefits of including a spiritual understanding within addiction care include increased recovery capital in the form of community support, increased treatment adherence, and resources to counteract narratives of personal shame and guilt (Van Denend et al., 2022). Since these programs are peer-led, there is no specific focus on emotional processes. Instead, the groups follow the 12-step philosophy from the Alcoholics Anonymous manual known as the "Big Book," which provides a structured and standardized framework for maintaining sobriety and has since been adapted to support other peer facilitated groups (Alcoholics Anonymous World Services, 2001).

The BPSS model, while not universally implemented, has gained prominence in addiction counselling practice (Csiernik, 2026). A critical dimension of this approach is the emotional component; an area explored to varying degrees by the various treatment approaches. As has been discussed, for many individuals with substance misuse concerns, the underlying emotional component is shame (Barnett, 2024; Batchelder et al., 2022; Chen, 2022; Jones et al., 2024). Drawing upon the established literature and practice in the addiction field, a distinct approach is proposed: the Emotional Nexus Recovery (ENR) model. The ENR model emphasizes the importance of emotions during substance misuse and the recovery process, focusing on shame as the key issue to explore and address in developing a foundation for decreasing or stopping substance use. The ENR model recognizes that a spiritually focused program fosters acceptance of the unknown through faith, hope, and purpose, which are often viewed as prerequisites for safety and meaningful lifestyle changes. To those who are struggling with a substance use disorder, their drug of choice is a primary tool of control or used to reduce the fear and anxiety of the unknown. Using ENR to express the human need underlying spirituality can help the individual separate religion, doctrine, and dogma from the spiritual process, again reducing the potential shame associated with rejection from the 12-step process due to a lack of belief in God. ENR is currently proposed as a brief intervention tool that identifies emotion as a barrier to behaviour change and improved quality of life. This awareness becomes a complement to other treatment modalities such as DBT and EFT, while most importantly reducing shame, allowing a person to progress through the TTM, and making strides toward less harmful coping strategies.

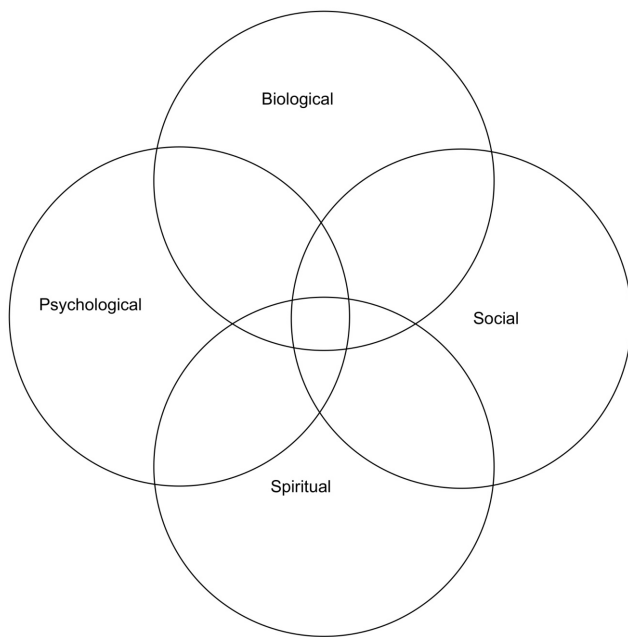


Figure 1. The Biopsychosocial-Spiritual Model

Adapted from Raffay, Wood, & Todd, 2016.

5. The Emotional Nexus Recovery model

The ENR model is a holistic approach for supporting those with addiction issues centring emotions within a biological, cognitive, social, and spiritual framework. While proposed as primarily an addiction recovery model, the concepts can be used to support overall well-being and quality of life for anyone searching for balance or stability. ENR incorporates elements of the BPSS and emotion-focused therapy models to conceptualize how everyday practices can help or hinder emotional well-being. By placing emotions in the center of the model, it symbolizes the ways in which biology, cognition, socialization, and spirituality affect an individual's emotional state. Conversely, it also recognizes that a poor or dysregulated emotional state, particularly one where shame is the dominant affect, can radiate outwards to impact all areas of well-being. To improve emotional functioning, it is fundamental that a framework for recovery recognize and name the importance of shame in the addiction process. The ENR model identifies emotional suffering, highlighted by shame, as the root of ongoing substance misuse and thus views emotional well-being at the center of recovery.

Both the traditional BPSS model (Figure 1) and the ENR model (Figure 2) can be visualized using a Venn diagram. Biological factors such as sleep, nutrition, and medication, and social factors such as family connection, community supports, and friendship are common to both models. Spirituality can be understood as the belief that one is not in control of everything that may happen in life, and having faith that life will work out in the way that it is meant to, alleviating the burden of not knowing (Maté, 2021). The main difference between the ENR and the BPSS models is the understanding of psychological factors and their positioning. Psychological factors within the BPSS model include both cognitions and emotions (Van Denend et al., 2022). The ENR model separates these two concepts; the traditional psychological section from the BPSS model becomes cognition,

and emotions are placed in the centre of the model and thus the treatment approach. As discussed, emotions, particularly shame, are a critical factor in the development and maintenance of addiction and thus, in response, the ENR model position them as such. By centring emotions in this way, the ENR model is drawing on practices of emotion-focused therapy through an understanding that emotions are at the root of all behaviour, including addiction (Barnett, 2024). Emotions in this way are considered central to all aspects of life and, therefore, a necessary component of healing. This moves away from the traditional understanding of addiction, which often centres addictive behaviours as the core issue and the focus of interventions. Additionally, spirituality is identified as all-encompassing to biological, cognitive, and social practices, rather than a separate entity, as it is through spirituality that one can find meaning in the other three domains of life and process adversity during uncertain times.

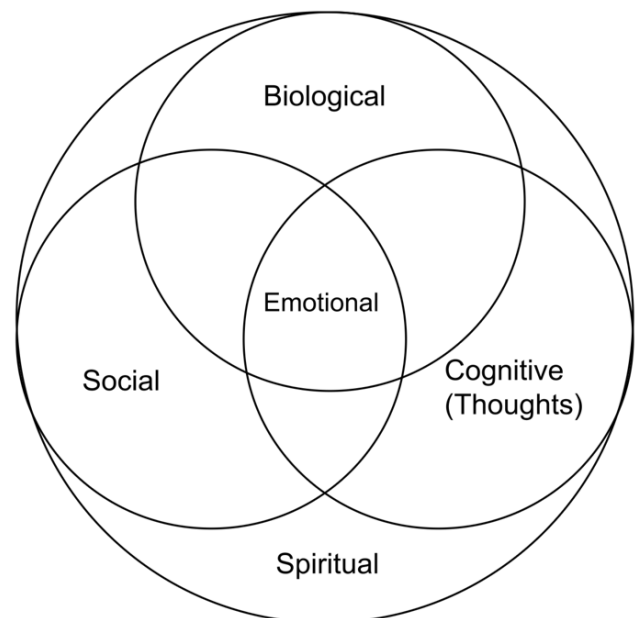


Figure 2. The Emotional Nexus Recovery Model

A common mantra used within the ENR framework is that people with addiction issues are emotional people who do not like their own emotions. Of course, affect, having emotions and being emotional, is a fundamental aspect of being human. "I don't like my emotions" can quickly evolve to, "I shouldn't have these emotions" which in turn morphs into the false belief that "if I have these emotions that I shouldn't have, I must not be normal." Not being normal leads to a state of shame, of one's emotions, one's behaviours and ultimately one's self. Applied to the misuse of drugs; the process of avoiding emotional experiences will be used to self-soothe negative feelings of not only shame, but also sadness and anger. Substance misuse has also been associated with difficulty in fully experiencing positive emotions, related to the concept of self-sabotaging due to discomfort with these emotions or fear that they will be followed by a loss (Joshalloo, 2013; Weiss et al., 2015; Weiss et al., 2018). The ENR model focuses on conscious awareness of emotional experiences and a desire to learn to feel these emotions in their full capacity. Rather than attempting to change emotional states, the focus shifts to understanding these emotional experiences and learning to coexist with them, beginning with shame.

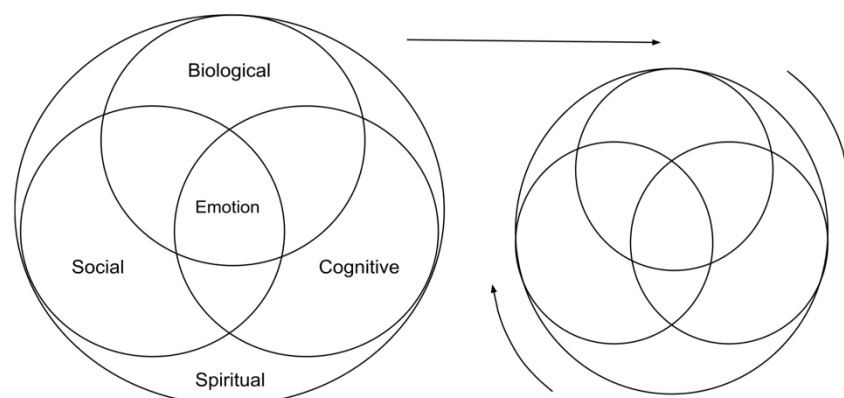


Figure 3. The Emotional Nexus Recovery Model Rotation

In clinical practice, ENR is used to demonstrate the unseen purpose of each emotion and its utility to survival. Much like our senses of sight, smell, and touch, which provide information to navigate daily life, our emotions do the same. In the ENR model, being human means using emotions to determine fundamental needs. For example, Sadness shows a person what has been lost and its subsequent value, or guilt points at an undesired result of our actions. When we create a link between emotion and a person's humanity and core functions, it can increase their self-compassion. Emotions are happening for us, not to us. In practical use, individuals gain autonomy and shift toward uncomfortable emotions associated with change because these emotions serve a greater purpose than suffering.

As described by Maté (2021), free choice comes from the ability to think about one's emotions and feel pain, without being motivated to suppress them through the use of addictive behaviours. By naming these emotions and allowing permission to feel them in their entirety, shame can be replaced with self-compassion. The ENR model argues that to do this, the individual must strive toward balance within the biological, cognitive, social, and spiritual domains of their life.

Central to the understanding of the ENR model of addiction is the emphasis on balance. If one were to focus only on their biological health, for example, by attending the gym multiple times a day, but did nothing to support their cognitive, social, or spiritual health, their recovery would not be holistic. This puts them in greater danger of relapse if something were to impact their ability to continue utilizing their one coping strategy, for example, an injury or illness that prevents them from working out. By focusing on all four domains, an individual is in a better position to face adversity and will have multiple mechanisms that they can use when they feel at risk. By seeing spirituality as all-encompassing, one may be even better able to manage hardships through an understanding that there is a greater purpose in life and find meaning in difficult situations. Adding arrows to the ENR model indicates forward motion, underscoring why balance is vital to a person's recovery (Figure 3). If one is lacking in a particular domain, they will need to work extra hard in the others to continue moving forward in their recovery journey. Imagine this as a tire with multiple air chambers biological, cognitive, social, and spiritual. If one of the areas becomes flat, the amount of energy required to push the tire forward would increase. A tire that is flat on one side easily creates an imbalance, needing more momentum

and energy to move the same distance. This extra torque creates stress on the wheel hub: our emotions.

Within the ENR model, there are multiple overlaps between domains. Many current therapeutic modalities for addiction would fall within one or two of the domains, while having little or no focus on the others. For example, CBT could be identified as primarily a cognitive approach to recovery, while DBT could fall within the overlap between cognitive and social domains, with the inclusion of groups. Mutual aid groups, such as Alcoholics Anonymous, focus on social and spiritual health, with some cognitive elements within the 12-steps, but do not overtly support biological well-being. Pharmacologically-assisted treatment, such as methadone or naltrexone support the biological aspects of withdrawal, but if used in isolation, neglect to consider the impact and importance of cognitive, social, and spiritual support. The intent of the ENR model is to encourage a recovery journey that incorporates all domains in order to develop a healthy emotional state, creating a full support system to mitigate relapse and improve overall well-being. With this is the understanding that each domain within the model has a direct impact upon the others, with emotions both impacting and being impacted by biological, cognitive, social, and spiritual factors.

Utilizing the ENR model, an individual can identify which areas of their life they feel they need additional support in to benefit their emotional wellbeing and recovery journey. Through assessing what is currently available to them within their biological, cognitive, social, and spiritual domains, they will be able to identify areas of potential growth. Additionally, by positioning emotions at the centre of the diagram, the importance of emotional health and overall quality of life remains the focus of recovery. It is important to note that emotional well-being is not the same as being happy, and that ultimate happiness is not the goal of recovery. Instead, emotional well-being is the ability to recognize, identify, and feel emotional experiences for what they are, without having to utilize psychoactive drugs to cope. Emotions can be utilized as a helpful guide to show someone what is important to them and what aspects of their life they feel are helpful or hurtful to their long-term recovery. By naming addiction as an adaptive strategy used to reduce overwhelming emotional experiences, shame can be reduced, and individuals can learn to practice self-compassion.

While the ENR model represents a promising framework for supporting individuals experiencing addictions, it has yet to be empirically evaluated to determine its effectiveness. Additionally, further reflection on the role of addictive behaviours needs to be

examined and may be warranted in future iterations of the model. Although the ENR framework positions emotional processes as the primary focus, with addictive behaviours identified as a secondary response, additional examination of how behaviours are represented within the model may enhance conceptual clarity. Finally, the application of the model across diverse cultural and socioeconomic contexts requires further exploration to ensure sensitivity and relevance.

A meaningful next step in establishing the effectiveness of the Emotional Nexus Recovery (ENR) model would involve a phased, mixed-methods research approach that reflects both its clinical complexity and its person-centred philosophy. Initial pilot studies could employ quasi-experimental designs in outpatient or recovery maintenance settings, comparing ENR-informed interventions with treatment as usual, with outcome measures including reductions in substance use, improvements in emotion regulation, and changes in shame and self-compassion. Building on these findings, randomized controlled trials (RCTs) would provide stronger empirical validation, ideally stratifying participants by severity and stage of change to assess differential impact. Given ENR's emphasis on emotional processing, validated psychometric tools such as measures of shame, affect regulation, and quality of life would be essential, alongside longitudinal follow-up to evaluate the sustainability of outcomes. Qualitative methodologies, including semi-structured interviews, should also be integrated to capture participants' lived experiences and the nuanced shifts in emotional awareness that may not be fully reflected in quantitative data. This combination of controlled trials and experiential data would allow for a comprehensive evaluation of ENR's effectiveness across diverse populations and treatment contexts, aligning with the model's holistic and integrative foundation.

6. Conclusion

The ENR model is proposed as an addition to the preexisting frameworks used to support individuals with addiction issues. It incorporates methodologies of empirically supported practices, primarily the BPSS and the emotion-focused therapy models, to provide a holistic understanding of the recovery process. The ENR model centres emotions as the root of both addiction and recovery, with the underlying philosophy that substance use is an adaptive survival strategy for overcoming life experiences. While identified as a helpful model for individuals, the ENR framework and its concepts can also be applied to family or group therapy settings. Future research needs to explore the clinical application of the ENR model across diverse treatment settings to refine its role within addiction recovery. In doing so, the model may contribute to a more holistic, responsive, and emotionally attuned approach to addiction care.

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Thomas More's Utopia: An Ingenious Architectural Design for Social Order and a Virtual Legislative Laboratory for Political Experimentation

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Abstract

Utopia is analysed as a rhetorical work characteristic of humanism that demands an active and interpretative reading. Its meaning is constructed through paradoxes that challenge conventional wisdom, in line with Erasmus of Rotterdam's proposal in a letter addressed to Ulrich von Hutten, and depends on both the historical context and the author's biographical details for a proper understanding. Finally, a brief section will be included linking utopia, science fiction and artificial intelligence as tools for reflecting on social organisation. From this perspective, Utopia can be understood as a theoretical framework that remains relevant today, whilst science fiction and artificial intelligence appear as contemporary manifestations of that same utopian impulse.

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Thomas More's Utopia: An Ingenious Architectural Design for Social Order and a Virtual Legislative Laboratory for Political Experimentation

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Abstract

Utopia is analysed as a rhetorical work characteristic of humanism that demands an active and interpretative reading. Its meaning is constructed through paradoxes that challenge conventional wisdom, in line with Erasmus of Rotterdam's proposal in a letter addressed to Ulrich von Hutten, and depends on both the historical context and the author's biographical details for a proper understanding. Finally, a brief section will be included linking utopia, science fiction and artificial intelligence as tools for reflecting on social organisation. From this perspective, Utopia can be understood as a theoretical framework that remains relevant today, whilst science fiction and artificial intelligence appear as contemporary manifestations of that same utopian impulse.

Keywords: *Utopia, paradox, Erasmus's letter, legislative laboratory, virtuality*

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1. Introduction

The aim of this paper is to outline the main interpretative keys to Utopia, a work in which the reader must draw upon their ingenium to unravel the profound meaning that More sought to convey. The author constructs his text as a rhetorical exercise, characteristic of Renaissance humanism, in which intellectual production is not limited to the narration of a story, but is conceived as a complex discursive practice.

This approach follows the rhetorical principles proposed by Erasmus of Rotterdam in a letter sent to Ulrich von Hutten, in which a portrait of More and the purpose of his Utopia is drawn. In this sense, the work is characterised by the formulation of argumentative positions which, on numerous occasions, are deliberately paradoxical or contrary to common opinion, demanding of the reader an active interpretation based on critical acuity, analytical subtlety and mastery of linguistic resources. This paradoxical dimension is linked to the humanist tradition of irony, through which dominant political, social and moral models are questioned by means of their discursive inversion, thereby revealing their internal tensions and limitations.

Likewise, it is essential to take into account both the author's biographical background and the historical and intellectual context in which Utopia was written, since these elements provide the necessary framework for a fuller understanding of the organisation and meaning of the text. It is for this reason that a selection of texts from the aforementioned work will be analysed, in which these principles will be put into practice.

More's Utopia is not merely a description of an ideal society; it also contains an implicit critique of simplistic political discourses. In this sense, it can be read today as a warning against forms of

populism or demagoguery, even though those terms did not exist as we understand them now. In this way, it dismantles the idea that there is a simple and perfect political solution.

Finally, I have outlined several conceptual connections between the Renaissance humanism of More and contemporary developments in artificial intelligence and science fiction. My intention has merely been to suggest this relationship, since addressing it in depth would require a more rigorous theoretical framework and would also lead me away from the main focus of this study. Nevertheless, the central aim of this research is to examine Utopia and to cautiously propose a comparison between early modernity and the present day.

2. Thomas More: Biographical and Historical Context

More (1478–1535) was a London-born humanist whose intellectual formation was deeply embedded in the legal and socio-political transformations of late fifteenth- and early sixteenth-century England. His development was decisively shaped by both the broader currents of humanism and institutional change, and by his upbringing within a family closely integrated into the English legal profession. This dual context contributed significantly to his intellectual outlook, his professional trajectory, and his conception of political and social order.

Although not of noble origin, More's family held a secure and respectable social position, reinforced by sustained involvement in the English legal establishment. Both his father and grandfather occupied posts at Lincoln's Inn, first in administrative capacities and later as members of the institution. His father, John More, advanced through a distinguished judicial career, being appointed a judge in

1503, entering the Court of Common Pleas in 1518, and subsequently serving in the King's Bench from 1520 until his death in 1530.

This hereditary connection with Lincoln's Inn ensured More's continuous proximity to the legal world, a factor that proved formative in shaping his intellectual sensibility and his understanding of governance, law, and social organisation.

As for his education, he is believed to have received a solid grounding in Latin. It is uncertain whether he continued with formal studies, as his academic training was interrupted when he entered service in a prominent ecclesiastical household. This transition proved decisive for his intellectual and personal development, as it exposed him to training in manners, politics, and humanist values under the guidance of a leading figure of the period.

Cardinal Morton continued More's education by sending him to the University of Oxford. However, it is not known for certain which college he attended or whether he remained long enough to obtain a degree. His father, concerned that his son's interest in literature might divert him from the law, provided him with very limited financial support.

Despite this, More made the most of his time at university. He perfected his command of Latin, particularly in writing, and began to take an interest in the then-novel study of Greek. To this end, he had the support of distinguished teachers such as William Grocyn (c. 1446–1519) and Thomas Linacre (c. 1460–1524), whose teachings had a significant influence on his education. He himself mentions having attended lectures on Aristotle's works in Greek, and he was also well acquainted with Plato's Republic.¹

His study of Greek had a profound impact on his intellectual life, enabling him to join the humanist circles of the Renaissance in the company of figures such as Desiderius Erasmus and John Colet.² This influence is clearly reflected in his work *Utopia*, where many names and concepts have Greek origins. After leaving the University of Oxford, More joined New Inn, linked to Lincoln's Inn, to continue his legal training. He was admitted to Lincoln's Inn in 1496 at the age of eighteen. Although little is recorded about this period, it was crucial in laying the foundations of his legal career.³

By the end of the 15th century, Europe was undergoing far-reaching change. Trade was beginning to be freed from old restrictions, as evidenced by the trade treaty of 1496, and the following year John Cabot (1450–1498) set sail from Bristol and reached Newfoundland.⁴ These events, together with the discovery of the New World, broadened the horizons of Christendom and aroused great intellectual interest.⁵ In this context, it is easy to

imagine the enthusiasm with which the young More, then a law student, followed these developments. Moreover, he showed an interest in travel accounts such as those of Amerigo Vespucci, as confirmed by the references to him in *Utopia*. His words continue as follows: "*Orbis terrarum contemplandi studio Americo Vesputio se adiunxit atque in tribus posterioribus illarum quatuor navigationum quae passim iam leguntur, perpetuus eius comes fuit, nisi quod in ultima cum eo non rediit*".⁶ After completing his studies, More began practising law,⁷ although he went through a period of uncertainty about his future. His father wanted him to pursue a career in law, but he felt increasingly drawn to religious life. For about four years, he lived near the Charterhouse in London, leading a lifestyle similar to that of a monk, and even considered entering the priesthood.

In the end, he decided against pursuing that path; influenced by the advice of John Colet (1467–1519) and guided by his own judgement, he opted for a secular life.⁸ In 1505, he married Jane Colt, with whom he had four children.

Settled in London, he led a stable family life and enjoyed a rapidly advancing professional career. In the legal field, he distinguished himself particularly in commercial matters and, in 1504, at the age of just twenty-six, he was elected to Parliament.⁹ In this context, he demonstrated considerable courage by opposing measures he considered unjust, introduced by the ministers of King Henry VII, actions that exposed him to significant personal risk.

Furthermore, in 1505, the year of his marriage, he welcomed Erasmus of Rotterdam into his home. From this encounter onwards, both humanists developed a close intellectual collaboration, which resulted in several joint literary works, including epigrams and translations of Lucian's dialogues from Greek into Latin. Whereas for Erasmus these activities were primarily a literary exercise, More approached them with a more reflective and intellectually purposeful intent. With the accession of Henry VIII to the throne in 1509, More witnessed the beginning of a new era filled with hope. As Henry VIII's secretary and personal adviser, More gradually gained increasing power and influence at court, evolving from a mere assistant into a key figure in the administration of the kingdom. Among his responsibilities, he received foreign diplomats, drafted official state documents, and represented the monarch in negotiations, demonstrating his active involvement in foreign policy. In addition, More attended the Court of Star Chamber thanks to his renowned legal expertise. He was also entrusted with judging "poor men's cases" in the lower courts, where he earned a reputation for fairness and accessibility, bringing a strong social dimension to his duties. In short, More evolved from a royal adviser into one of the kingdom's most influential political figures, combining diplomatic, legal, and administrative responsibilities while contributing to the delivery of justice for the most vulnerable members of society.¹⁰ However, in 1510, he suffered a severe personal blow: the death of his wife, Jane. Although he remarried that same year to Alice

¹The foreword to J.H. Lupton's edition presents a comprehensive and rigorous study of More's life. Briefly, I note that this volume was published in Oxford in 1895 and is based on the Latin edition of 1518 and Ralph Robynson's first English translation of 1551, with Lupton's translations, introductions and notes. (Lupton, 1895, pp. xvii–xxviii)

²(Glenn, 1941, p. 192).

³(Lupton, 1895, p. xx).

⁴In 1497, John Cabot undertook the first modern European expedition to reach and chart the east coast of North America, probably Newfoundland (Canada), under the flag of Henry VII of England. (Jones & Condon, 2016, pp. 1–2).

⁵Towards the end of the fifteenth century, Amerigo Vespucci was sent to Seville to manage the Medici family's commercial affairs, becoming part of the city's dynamic mercantile milieu. At the time, Seville was the principal economic centre of Castile under the reign of Isabella I of Castile and Ferdinand II of Aragon, during the final stages of the conquest of Granada. There, he worked with the merchant Giannotto Berardi, who was involved in preparing Christopher Columbus's voyages, thereby facilitating contact between the two men. Following Berardi's death in 1495, Vespucci assumed greater responsibilities in the organisation and management of expeditions. Between January and February 1496, Vespucci was in Sanlúcar de Barrameda, where he oversaw the provisioning and departure of a fleet carrying supplies to Columbus in the newly discovered Indies. This experience marked a decisive turning point in his career, as it marked the beginning of his direct involvement in Atlantic voyages of exploration. In time, Vespucci became a renowned cosmographer, and his accounts of the exploration of the New World, whether entirely accurate or not, circulated widely throughout Europe. Their impact was such that, scarcely a decade later, European cartographers chose to

name the newly identified continent after him: America. (Fernández-Armesto, 2006, pp. 33–40; Robles Macias, 2015, pp. 1, 7–13; Moreno Jeria, 2018, pp. 55–56)

⁶(Morus, 1548, p. 30).

⁷(Glenn, 1941, p. 187).

⁸John Colet was the only surviving son of Henry Colet, a wealthy London merchant who served twice as Lord Mayor of London. He studied at Cambridge and, in 1497, began his ecclesiastical career, being ordained first as a deacon and later as a priest. He subsequently settled in Oxford, where he distinguished himself through his innovative lectures on the biblical exegesis of St Paul's epistles, introducing a direct analysis of the text and its historical context, an approach that was highly unusual at the time. There, he formed a close friendship with Erasmus of Rotterdam, who later wrote his biography. In 1504, he was appointed Dean of St Paul's Cathedral in London, where he founded St Paul's School and sought to promote ecclesiastical reforms, albeit with limited success. (Dimock, 1900, p. 20; Arnold, 2003, pp. 204–209).

⁹(Hermida del Llano, 2017, p. 261).

¹⁰(Guy, 1976, pp. 491–492).

Myddelton, partly out of the need to care for his children and fulfil his responsibilities, this loss left a deep mark on his life.

During those years, the scholar continued to advance his career. His new wife also became part of the family, and he took charge of her intellectual education, as he had done before.¹¹ More was appointed a member of the council of his bar college and, in 1511, was commissioned to teach there.¹² Despite this intense working life, he managed to find time to devote himself to writing. During those years, he translated the *History of Richard III*, as it is thought that Cardinal Morton wrote the aforementioned work in Latin. The publication of this treatise in English marked the beginning of his recognition as one of the first great prose writers in the English language.

Furthermore, in 1508, he had joined the Guild of Merchants, one of the city's most important institutions. This experience gave him an intimate insight into the communal life of the guilds, which likely influenced some of the social ideas he would later develop in Utopia.

In this environment, he renewed his friendship with Colet, then Dean of St Paul's Cathedral. Together, they frequently discussed educational reform and collaborated on projects such as the foundation of St Paul's School, an innovative institution where Greek was taught publicly for the first time in England. The school soon became one of the leading centres of Renaissance humanism in the country and came to embody the educational ideals of Humanism in their most refined form. Erasmus prepared teaching manuals for the institution, while More defended it vigorously when its founder became the target of criticism and defamation. Around 1510, William Lily (1468–1522)¹³ began teaching in the shadow of the cathedral, whilst Erasmus was drafting his *Praise of Folly* under More's roof.

More's life was, in the fullest sense, that of a committed citizen. His prestige as a jurist and his membership of the Mercers' Company marked him out as the most suitable person to defend the legal rights and privileges of his fellow citizens. Thus, when tensions between London merchants and foreign merchants established in the city intensified in 1514, the creation of a commission to resolve them was proposed, and there was a strong desire for More to be part of it. He was sent as an ambassador to intervene in matters of great importance between English merchants and those of the Hanseatic League.

However, what was at stake went far beyond a mere local rivalry. The conflict affected all English wool exporters, as wool formed the basis of the national trade at that time. As early as the 13th century, it was said that everyone wore English wool made in Flanders, which gives an idea of the economic significance of this activity.

In the past, Henry III of England had granted the merchants of the Hanseatic League a headquarters, or trading post, in London. Subsequently, his successors extended these privileges within the context of the evolving and frequently unstable nature of English commercial policy.

The trade balance between England and Flanders was disrupted following the annulment of the marriage between Charles V and Henry VIII's sister, which led England to ban the export of wool. The measure harmed both countries, so in 1515 an embassy was sent to the Netherlands to reestablish trade, in which More participated alongside Cuthbert Tunstall.¹⁴ The mission was successful and, on his return to London, work began on his Utopia.¹⁵ It was during his

stay in the Netherlands in 1515 that More drafted the Second Book of his Utopia (the first he had composed). The First Book, conceived as an introduction, was written in the spring or summer of 1516, while Cardinal Thomas Wolsey was attempting to persuade its author to enter direct service at court.¹⁶

To conclude, it is worth mentioning a few significant facts. In 1516, More led an extraordinarily busy life, juggling a multitude of highly significant responsibilities. He was a prestigious practising lawyer, renowned for his competence and professional reputation. Furthermore, he held the office of one of the two deputy sheriffs of London, a key position in the city's judicial administration. In addition, he served as a judge in the Sheriff's Court, where he administered justice in legal matters, and as an arbitrator in the Court of Chancery, where he helped resolve disputes of a more complex and equitable nature.¹⁷ The laws in defence of farmers, proposed by Parliament¹⁸ in 1516, are reflected in Utopia.¹⁹

On 1 May 1517, the Privy Council asked More to intervene to calm an angry mob that had attacked the homes of foreign merchants. For a moment, in the midst of this difficult situation, it seemed he might succeed in restraining the crowd. However, people's passions proved too intense.

In 1518, or perhaps even earlier, More was appointed Master of Petitions and became a member of the Privy Council. In 1520, he accompanied the king to the Field of the Cloth of Gold.²⁰ The following year, in 1521, he was knighted and appointed Sub-Treasurer.

In 1523, he moved to his residence in Chelsea,²¹ where he led a quiet and stable life. In the same year, he was elected Speaker of the House of Commons. Subsequently, on 29 October 1529, he was appointed Lord Chancellor,²² a position he held until his resignation on 6 May 1532. Finally, he died on 6 July 1535, leaving behind a consolidated reputation as a figure of integrity and fidelity to his principles.²³

3. Contributions from the paratexts of the 1805 edition of Utopia, printed in Madrid, and the 1895 edition, published in Westminster

3.1. The 1805 Madrid edition

3.1.1. Contributions by Gerónimo Antonio De Medinilla (c. 1590)

In 1805, a translation of Jerónimo Antonio de Medinilla y Porres appeared in Madrid. In this work, the author offers a clearly laudatory interpretation of More, whom he includes among the leading writers who imagined ideal republics. In this regard, he emphasizes More's role as Lord Chancellor of England, as well as his political prudence, presenting these as the basis of an authority understood both in intellectual and moral terms. This approach ultimately leads to a highly idealized image of his figure.

However, this perspective presents certain limitations, as it simplifies the historical complexity of the author and reduces his political and institutional career to a primarily moral evaluation. Moreover, the clear distinction established in the prologue between

¹¹(Lupton, 1895, p. xxv).

¹²The preface to J.H. Lupton's edition presents a comprehensive and rigorous study of More's biography. (Lupton, 1895, pp. xvii–xxviii).

¹³(Carlson, 1992, pp. 158–159).

¹⁴(Hill, 2024, pp. 52–60).

¹⁵(Morus, 1548, pp. 27–28).

¹⁶(Lupton, 1895, p. xxvii)

¹⁷(More, 2012, p. 17).

¹⁸(Finberg, 1967, pp. 33–36, 70–75; Elton, 1955, pp. 71–73).

¹⁹(Lupton, 1895, p. xxxvi).

²⁰The Field of the Cloth of Gold was a lavish diplomatic summit held from 7 to 24 June 1520 between Henry VIII of England and Francis I of France near Guines, in northern France. It sought to consolidate the Anglo-French alliance and display the power of both monarchs during the period of rivalry with Emperor Charles V.

²¹(Reynolds, 1968, p. 54).

²²(Glenn, 1941, p. 190).

²³(More, 1805, pp. 167–186).

republics “as they are” and “as they should be” encourages an overly normative reading, which weakens the critical richness of

More’s thought and overlooks the tension between political ideal and social reality. In the same line, the idea that a ruler’s justice should be uniformly extended to all subjects introduces a moral vision of power which, although consistent with humanist thought, reduces the complexity and ambiguity of the utopian discourse. Furthermore, Medinilla argues that More avoided direct criticism of his own time by constructing an ideal model of political organisation, based on institutions considered superior to those of Sparta, Athens, or Rome. From this perspective, this model relies on virtue, the elimination of vice, and the abolition of private property as means of limiting ambition and ensuring equality and justice. Nevertheless, this interpretation assumes a level of coherence in More’s thought that is debatable, since it presents as closed and systematic a text that is, in reality, more complex and open.

In fact, this reading overlooks that some of the measures associated with Utopia also appear in More’s political practice during his time as a Member of Parliament, which challenges the strict separation between theory and political action. Likewise, it is not entirely accurate to view his work as an external critique of society, since More was actively involved in government and held diplomatic, legal, and administrative roles. His participation in the so-called “cases of the poor,” in which he dealt with disputes involving individuals with limited resources, further demonstrates his direct engagement with the social dimension of justice. In this sense, More cannot be seen merely as an external observer, but rather as an actor integrated into the political system, combining the exercise of power with concern for its social effects.

Finally, Medinilla describes the style of More’s work as elaborate and profound, comparing it to historians such as Livy and Tacitus, since it does not merely praise, but also examines human passions. In addition, he notes that this admiration led him to disseminate the work, aiming to convey its general meaning rather than its literal wording, with the intention of making it accessible to a broader audience. However, this reading tends to overstate the coherence of both the style and the moral message of the work, offering a unified interpretation that fails to reflect its complex and sometimes contradictory nature. In this sense, the comparison with classical historiography functions more as a strategy of cultural legitimisation than as a rigorous critical analysis of More’s style.²⁴

3.1.2. Paratext by Francisco Gómez de Quevedo Villegas y Santibáñez Cevallos (1580–1645) in the 1802 edition

In the aforementioned 1805 edition, in the section entitled *Notice, Judgement and Recommendation of Utopia*, Francisco de Quevedo offers an assessment of the work and its author. He presents More as a man of great learning, virtue and steadfastness, whose exemplary life culminated in a martyrdom that confirmed his moral integrity.

Quevedo²⁵ highlights that Utopia, whose name means “a place that does not exist”, was written in a political context that forced criticism to be veiled. Thus, More created a fictional island to criticise the abuses of rulers of that period and propose an alternative model of social organisation. According to Quevedo, the text affirms what ought to be done, even if no one practises it, while criticising everyone. As we shall see, this is not entirely true of More’s intention in his work; in reality, it must be understood as a critical exercise in distancing that employs paradox as an instrument of political and moral reflection. We must not forget that the English scholar was

a member of Parliament and carried out legislative functions that appear as proposals in Utopia.

Furthermore, Quevedo highlights the recognition More received from figures such as Erasmus of Rotterdam, and emphasises the depth of his work: although brief, it contains teachings that could guide both rulers and citizens. Thus, he concludes that Utopia is not merely a literary work, but also a valuable political and moral treatise. As we shall see in the section devoted to the portrait of

More’s physical and intellectual traits, drawn by Erasmus in a letter addressed to Ulrich von Hutten, Quevedo was not mistaken in his consideration of the etymology of Utopia: “oi-” (a Greek prefix meaning “not”) and “τόπος” (“place”), together combined, convey the meaning of “a place that does not exist” or “nowhere”. Following Erasmus, Utopia arises from a literary creation that puts the reader’s ingenuity to the test.

3.2. The 1895 edition, published in Westminster

In the 1895 edition edited by Edward Arber, which contains Ralph Robinson’s (1520–1577) English translation, the introduction outlines the publication history of the work.²⁶ The second book of Utopia was probably composed in Antwerp around November 1515, and the first book in London in early 1516. The work was printed by Theodore Martin in Leuven, under the editorship of Erasmus, Petrus Aegidius (Pieter Gillis), John Paludanus and other friends of More in Flanders, towards the end of 1516. More subsequently revised the text and, through Erasmus, sent it to Johannes Froben in Basel for printing.²⁷ This more sumptuous edition, considered the second in terms of authorship and likely containing the standard text, is dated November 1518. Meanwhile, however, a friend of Erasmus, the Englishman Thomas Lupset, produced a reprint of the first edition in Paris, printed by Gilles de Gourmont before March 1518, which is therefore, in chronological order, the second edition, with the Basel edition being the third and a Viennese edition in 1519 the fourth in order of appearance. All four were written in Latin, which was then the common and familiar language of scholars.²⁸

By a strange twist of fate, not a single copy of this work, in any language, was printed in England during More’s lifetime, nor before these English versions by Ralph Robinson. However, despite its original Latin form, the work is essentially English and will always rank among the treasures of English literature.²⁹ The characters’ first meeting takes place at the entrance to Antwerp Cathedral, where Raphael Hythloday, Petrus Aegidius (Pieter Gilles) and More make their way to the garden of the latter’s house, a peaceful spot that lends itself to conversation. There, seated on a grass-covered bench and in the company of John Clement,³⁰ they while away the entire day listening to Hythloday’s account.

²⁶(Morus, 1895, pp. xxi).

²⁷In the preface to the 1895 edition, published in Oxford, Lupton is more explicit regarding the first edition of Utopia, in Latin, which was printed by Thierry Martin in Leuven, in late 1516. The printing process appears to have been very swift. On 12 November, Gerhard of Nijmegen wrote to Erasmus to inform him that Martin would undertake the task. A week later, we learn that the work is in the printer’s hands. By 24 February 1516/1517, the book is already on the market; indeed, in a letter to Cope, Erasmus asks him to send him a copy. (Lupton, 1895, p. lxiv)

²⁸Lupton discusses the editions of Utopia in depth in his preface. (Lupton, 1895, pp. lxiv–lxxvi).

²⁹(More, 1895, p. 3).

³⁰John Clement was initially a servant of More and accompanied him on his diplomatic mission to the Netherlands in 1515. His subsequent career, however, reflects a remarkable intellectual and social ascent. Under More’s influence, he received a solid humanist education, learning Latin and eventually mastering Greek to the point of teaching it at Oxford. He later established himself as a highly respected physician, ultimately becoming president of the College of Physicians. His connection to More’s family was further strengthened when he married More’s adopted daughter. (More, 2012, p. 18).

²⁴(More, 1805, fols. A2r–A3v).

²⁵(More, 1805, fols. A4r–A6r).

The narrative is organised into two parts: before lunch, the contents of the first book are presented, focusing on more critical and realistic issues; afterwards, between lunch and dinner, the second book unfolds, describing the ideal society of Utopia. In this way, More constructs his work as a plausible dialogue, lending an air of reality to a largely imaginary tale.³¹ In the introduction to the 1895 edition, Edward Arber reflects on the different ways in which Utopia can be interpreted and briefly compares it with *The Republic*. Utopia may be understood from several perspectives: it reveals the author's personality, ideals, and creativity, while also presenting possible solutions to social problems such as poverty, overpopulation, and famine. Although both works describe ideal societies, they pursue different aims.

Plato, through the figure of Socrates, seeks to explore the nature of justice and injustice, first within the organisation of the state and then within the individual. More, by contrast, uses Utopia as a form of social criticism. He describes a society controlled by wealthy elites who protect their own interests while claiming to serve the common good.

Whereas Plato's work is mainly a philosophical reflection on virtue, justice, and the ideal state, More focuses on the social and economic inequalities of sixteenth-century England. In Utopia, he imagines a more egalitarian society in which poverty and the idleness linked to privilege no longer exist. His model is based on collective responsibility and the belief that property should belong to the community rather than to individuals. Through this vision, More criticises corruption, greed, and social injustice, suggesting that true social harmony can only be achieved when the common good is placed above private interests.³²

4. An intellectual portrait of More and interpretive keys to Utopia in Erasmus' letter to Ulrich von Hutten

Erasmus of Rotterdam describes our English scholar in a letter addressed to Ulrich von Hutten,³³ written in Antwerp in 1519. The letter highlights More's ingenium,³⁴ that is, his exceptional intelligence, creativity, and intellectual brilliance, qualities that inspire admiration within the humanist circle. The author explains that More's writings, distinguished by their erudition and sharp insight, create a strong sense of connection among readers and strengthen bonds within the intellectual community. In this context, Ulrich von Hutten is presented as one of the admirers of More's talent, although the text also suggests a reciprocal relationship between the two humanists, since both express mutual respect and recognition through their writings.

On the other hand, the difficulty of fully describing More is emphasised; his intellectual greatness places him on a par with classical figures such as Alexander the Great or Achilles, but his excellence lies in the realm of wit and virtue, not in military heroism.

Quod Thomae Mori ingenium sie deamas ac pene dixerim deperis, nimirum scriptis illius inflammatus, quibus, ut vere scribis, nihil esse potest neque doctius neque festivius, istuc, crede mihi, clarissime Huttene, tibi eum multis commune est, cum More mutuuum etiam: nam is vicissim adeo scriptorum tuorum genio delectatur ut ipse

*tibi propemodum inuideam. Haec videlicet est illa Platonis omnium maxime amabilis sapientia, quae longe flagrantiores amores excitat inter mortales quam vllae quamlibet admirabiles corporum formae. Non cernitur illa quidem oculis corporeis, sed et animo sui sunt oculi; ut hic quoque verum comperiat illud Graecorum, ἐκ τοῦ ὅπου γίγνεται ἀνθρώποις τὸ ἐπν. Per hos fit aliquoties ut ardentissima charitate conglutinentur inter quos nec colloquium nec mutuus conspectus intercessit. Et quemadmodum vulgo fit ut incertis de causis alia forma alios rapiat, ita videtur et ingeniorum esse tacita quaedam cognatio, quae facit vt certis ingeniis impense delectemur, caeteris non item. Caeterum quod a me flagitas, ut tibi totum Morum velut in tabula depingam, utinam tam absolute praestare queam quam tu vehementer eupis! Nam mihi quoque non iniucundum fuerit interim in amici multo omnium suauissimi contemplatione versari. Sed primum οὐ παντὸς ἀνδρὸς ἐότιν omnes Mori dotes perspexisse. Deinde haud scio an ille laturus sit a quolibet artifice depingi sese. Nec enim arbitror leuioris esse operae Morum effingere quam Alexandrum magnum aut Achillem, nec illi quam hic noster immortalitate digniores erant.*³⁵

In the following passage, More is presented as someone inclined from a very early age towards humanistic culture and classical learning. From the outset, it is emphasised that he had been profoundly immersed in the fine arts since early childhood ("bonas literas a primis statim annis hauserat"),³⁶ thus underscoring his formative education and his natural inclination towards humanistic studies. This vocation becomes evident when he states that he devoted himself to the study of Greek literature and philosophy ("ad Graecas literas atque philosophiae studium sese applicuit"),³⁷ turning his intellectual pursuits towards the disciplines characteristic of the Renaissance humanist ideal. However, this decision caused a serious family conflict, as he made it without his father's support ("adeo non opitulante patre"),³⁸ who even deprived him of all financial support ("omni subsidio destitueret").³⁹ The reason for this opposition was that More appeared to be turning away from his father's studies ("quod a patriis studiis deseiscere videretur"),⁴⁰ that is to say, he was abandoning the family tradition linked to law. His father, a prestigious jurist, saw this profession as the best path to honour and social recognition, for those who attained authority in it are considered great and famous ("habentur magni clarique").⁴¹ Erasmus thus contrasts the social prestige of law with the true arts ("verae litterae"),⁴² noting further that that profession was utterly alien ("alienissima")⁴³ to authentic humanistic learning.

Erasmus also highlights More's excellence in the legal sphere. He states that litigants consulted no one more willingly ("neque consulerent quemquam libentius litigatores"),⁴⁴ and adds that no one reaped greater financial rewards than he did. All this was attributed to the remarkable strength and swiftness of his wit ("tanta vis ac celeritas ingenii"),⁴⁵ a remark through which Erasmus underscores More's extraordinary intelligence. In this way, he constructs the image of a humanist who was brilliant by nature, capable of succeeding even in a discipline that did not fully correspond to his true intellectual vocation.

³⁵(Erasmus, 1922, p. 13).

³⁶(Erasmus, 1922, p. 17).

³⁷(Erasmus, 1922, p. 17).

³⁸(Erasmus, 1922, p. 17).

³⁹(Erasmus, 1922, p. 17).

⁴⁰(Erasmus, 1922, p. 17).

⁴¹(Erasmus, 1922, p. 17).

⁴²(Erasmus, 1922, p. 17).

⁴³(Erasmus, 1922, p. 17).

⁴⁴(Erasmus, 1922, p. 17).

⁴⁵(Erasmus, 1922, p. 17).

³¹(Lupton, 1895, pp. xlii–xliii).

³²(More, 1895, pp. 3–5).

³³Mishtooni Bose analyses Hutten's life through the lens of activism. He argues that Hutten was not merely a writer, but the first example of a modern intellectual who sought to live (and die) for an active political cause. (Bose, 2020, pp. 39–68).

³⁴Travis Curtright analyses the meaning and English translation of the Latin term "ingenium" in the introductory letters to the 1518 edition of Utopia. (Curtright, 2017, pp. 1–18).

*Bonas literas a primis statim annis hauserat. Iuuenis ad Graecas literas atque philosophiae studium sese applicuit, adeo non opitulante patre, viro alioqui prudenti proboque, ut ea conantem omni subsidio destitueret; ac pene pro abdicato haberetur, quod a patriis studiis deseiscere videretur: nam is Britanniarum legum peritiam proficitur. Quae professio ut est a veris literis alienissima, ita apud Britannos eum primis habentur magni elarique, qui in hoc genere pararunt autoritatem. Nec [temere] apud illos alia via ad rem ae gloriam parandam magis idonea; siquidem plerumque nobilitatem illius insulae peperit hoe studiorum genus. In eo negant quenquam absolui posse nisi plurimos annos insudarit. Ab hoc igitur cum non iniuria abhorreret adolescentis ingenium melioribus rebus natum, tamen post degustatas scholasticas disciplinas sie in hoe versatus est ut neque consulerent quemquam libentius litigatores, neque quum uberem faceret quisquam eorum qui nihil aliud agebant. Tanta erat is cleritas inge.*⁴⁶

Amid this atmosphere of intellectual effervescence, the decision to host lectures on St Augustine's *The City of God* in the Church of San Lorenzo appears especially meaningful and readily intelligible. Yet this choice is surprising for a law student, as it reflects his early preoccupation with the idea of an ideal society, which he would later develop in his work *Utopia*. At this point, it is worth noting that Plato's *Republic* constitutes one of the most evident sources of *Utopia*. nevertheless, the influence of Augustine of Hippo and *The City of God* can also be discerned, introducing a moral and theological dimension into More's political thought.⁴⁷ In this way, the

English humanist's work not only reworks the political ideal inherited from Plato but also complements it with a Christian vision derived from Saint Augustine, in which order, discipline, and subordination to the common good acquire a deeper significance within the community.⁴⁸

On the other hand, returning to the commentary on the letter, it is clear that the English scholar's reservations about religious life set him apart from many others who entered the priesthood without adequate preparation or without having fully tested their vocation. More, by contrast, emerges as a prudent and thoughtful figure, deeply aware of the gravity of such a commitment and of the demands it entailed. However, the only real obstacle to his ordination was his desire to marry. His decision was not due to any lack of religious devotion or personal discipline, but rather to a conscious choice in favor of a different way of life. Consequently, he decided not to pursue the priesthood and instead embraced lay life through marriage.

Taken as a whole, the passage presents More as an exceptional figure, intellectually capable of teaching theology and spiritually disciplined enough for ecclesiastical life, yet one who ultimately chose marriage over the priesthood. Significantly, this decision is portrayed not as a sign of weakness or spiritual failure, but rather as an expression of fidelity to his own convictions and chosen way of life.

Quin et euoluendis orthodoxorum voluminibus non segnem operam impendit. Augustini libros De Ciuitate Dei publice professus est adhuc pene adolescens auditorio frequenti; nec puduit nec poenituit sacerdotes

⁴⁶(Erasmus, 1922, p. 17).

⁴⁷Indeed, the Augustinian conception of domestic peace, based on the agreement between governance and obedience, where those who exercise authority do so for the good of others and, in turn, are also servants, finds a clear echo in the social organisation described in *Utopia*. There, each family is governed by a strict hierarchy headed by the eldest member, and daily life is subject to a rigorous moral order that regulates both family relations and religious and social practices; indeed, even those who govern are servants of those over whom they appear to rule. The concepts outlined can be found in Augustine of Hippo's work, *The City of God* (19, 14).

⁴⁸(Lupton, 1895, pp. 51–53).

*ae senes a iuvene prophano sacra discere. Interim et ad pietatis studium totum animum appulit, vigiliis, ieiuniis, precationibus aliisque consimilibus progymnasmatibus saeerdotium meditans. Qua quidem in re non paulo plus ille sapiebat quam plerique isti qui temere ad tam arduam professionem ingerunt sese, nullo prius sui periculo facto. Neque quiequam obstat quo minus sese huic vitae generi addiceret, nisi quod uxoris desyderium non posset excutere. Maluit igitur maritus esse castus quam sacerdos impurus.*⁴⁹

Subsequently, the author describes in considerable detail More's position at the Court of Henry VIII and constructs a very concrete picture of his relationship with power. Firstly, it is clearly stated that More did not enter the court out of ambition or his own desire, but at the insistence of the monarch, who went so far as to "drag him to his court" ("in aulam suam pertraheret").⁵⁰ The text even highlights the paradox: "No one ever sought admission to the court with such vehemence as he sought to avoid it" ("Nullus unquam vehementius ambiit in aulam admitti quam hic studuit effugere").⁵¹ This reinforces the idea that his rise to power did not stem from personal ambition, but rather from pressure exerted by the king, who regarded him as an indispensable figure within his political circle.

The letter also describes in detail his specific duties as an adviser and judge in difficult matters. However, despite his prominent role in government affairs, More rejects the accumulation of honours and formal power, a stance that clearly distinguishes him from other courtiers driven by ambition.

Finally, the text concludes with an idealised assessment: "Happy are the republics if the prince were to appoint magistrates like More everywhere" ("felices respublicas si Mori similes magistratus ubique praeficeret princeps").⁵² In this way, Erasmus presents More as a model of the perfect public servant, useful to those in power, yet neither dominated nor corrupted by ambition.

*In qua eum se cordatissime gessisset, non conqueuit serenissimus Rex Henricus eius nominis octauus donec hominem in aulam suam pertraheret. Cur enim non dicam pertraheret? Nullus unquam vehementius ambiit in aulam admitti quam hic studuit effugere. Verum cum esset optimo Regi in animo familiam suam eruditus, grauibus, cordatis et integris viris differtam reddere, cum alios permultos, tum Morum in primis acciuit; quem sic in intimis habet ut a se nunquam patiatur discedere. Sive seriis utendum est, nihil illo consultius; siue visum est Regi fabulis amoenioribus laxare animum, nullus comes festiuior. Saepe res arduae iudicem grauem et cordatum postulant; has sic Morus discutit ut utraque pars habeat gratiam. Nec tamen ab eo quisquam impetrauit ut munus a quoquam acciperet. Felices respublicas si Mori similes magistratus ubique praeficeret princeps! Nec interim ullum accessit supercilium. Inter tantas negociorum moles et veterum amiculorum meminit et ad literas adamatas subinde redit.*⁵³

Likewise, the author continues to portray More as a model of public virtue and selfless service, emphasising that he never exploited his position for personal gain but instead used it for the benefit of others. He further stresses that his spirit was always inclined toward the common good, a quality that became even more evident when his power was greatest ("nunc magis exerit, quando plus potest prodesse").⁵⁴ More is presented almost as a "public protector of the poor" ("diceret Morum esse publicum omnium inopum patronum"),⁵⁵ always ready to relieve suffering, guide the confused, and reconcile

⁴⁹(Erasmus, 1922, p. 18).

⁵⁰(Erasmus, 1922, p. 20).

⁵¹(Erasmus, 1922, p. 20).

⁵²(Erasmus, 1922, p. 20).

⁵³(Erasmus, 1922, p. 20).

⁵⁴(Erasmus, 1922, p. 21).

⁵⁵(Erasmus, 1922, p. 21).

those in conflict. In this way, he emerges as a figure of compassion and moral integrity. Furthermore, the author emphasises that More found satisfaction in helping others without expecting anything in return or reminding them of the favours he had done. Finally, despite his success and happiness, he remained entirely free from vanity, reinforcing his image as a humble and genuinely virtuous man.

*Quicquid dignitate valet, quicquid apud amplissimum Regem gratia pollet, id omne iuuandae reipublicae, iuuandis amicis impendit. Semper quidem adfuit animus de cunctis benemerendi eupidissimus mireque pronus ad misericordiam: eum: nunc magis exerit, quando plus potest prodesse. Alios pecunia subleuat, alios auctoritate tuetur, alios commendatione prouehit. Quos alioqui iuuare non potest, his consilio succurrit. Nullum unquam a se tristem dimisit. Diceret Morum esse publicum omnium inopum patronum. Ingens lucrum sibi putat accessisse si quem oppressum subleuauit, si perplexum et impeditum explicuit, si alienatum redegit in gratiam. Nemo lubentius collocat beneficium, nemo minus exprobrat. Iam cum tot nominibus sit felicissimus, et felicitatis comes fere soleat esse iactantia, nullum adhuc mortalium mihi videre contigit qui longius abesset ab hoc vitio.*⁵⁶

Regarding his literary education, Erasmus returns to the subject of More's studies, since these were precisely what most strengthened the relationship between the two men. In his youth, More devoted himself mainly to poetry; later, however, much of his effort was directed toward refining his prose and making it more elegant and polished. At the same time, his mastery of a wide range of literary genres continued to expand.

*Sed ad studiorum commemorationem redeo, quae me More mihique Morum potissimum conciliarunt. Primam aetatem carmine potissimum exercuit, mox diu luetatus est ut prosam orationem redderet molliorem, per omne scripti genus stilum exercens. Qui cuiusmodi sit, quid attinet commemorare? tibi praesertim qui libros eius semper habeas in manibus. Declamationibus praecipue delectatus est, et, in his, materiis adoxis, quod in his aerior sit ingeniorum exercitatio. Unde adolescens etiamnum dialogum moliebatur, in quo Platonis communitatem ad uxores usque defendit. Luciani Tyrannicidae respondit; quo in argumento me voluit antagonistam habere, quo certius periculum faceret equid profecisset in hoc genere. Utopiam hoc consilio edidit (printed: aeditit),⁵⁷ ut indicaret quibus rebus fiat ut minus commode habeant respublicae.*⁵⁸

The aforementioned fragment of the letter is essential for interpreting and understanding Utopia. It describes in considerable detail More's literary interests, his approach to learning, and several key aspects of his humanist and rhetorical education. First, the text highlights his preference for *declamationes*, rhetorical exercises that formed a central part of humanist training. These were not simply speeches, but intellectual exercises in which students defended positions that were often difficult, unconventional, or even contrary to common sense. For this reason, the letter refers to the "*materiae adoxae*"⁵⁹ ("paradoxical topics"), since such subjects were believed to sharpen the intellect by demanding subtle argumentation, creativity, and a refined command of language.

Erasmus refers to the term "*adoxis*" ("materiis adoxis") as the rhetorical exercise practised by More. The word "*adoxis*" means "without reputation" or "contrary to *Sóia*" ("opinion"). In short, it

refers to the unbelievable, the implausible, the shocking, the absurd, or that which contradicts general opinion.⁶⁰

In ancient rhetoric, as systematised by rhetoricians such as Cicero and Quintilian,⁶¹ a distinction was made between "*vdoia*" ("commonly accepted opinions" or "plausible ideas")⁶² and "*adoxia*" ("implausible" or "paradoxical" arguments). Practising with "*adoxia*", as Erasmus explains, involved defending ideas that at first appeared false, absurd, or provocative. This exercise had an important rhetorical function, since it trained students to construct persuasive arguments even in difficult or unfavourable circumstances. At the same time, it also served a philosophical purpose, since confronting ideas that challenged common assumptions encouraged students to question what was usually taken for granted. In this way, engaging with the improbable compelled students to examine more carefully and justify more rigorously what they took to be true.

Following these rhetorical principles, the letter informs us of a previously unknown dialogue written by More in his youth, in which he defends Plato's doctrine of the community of goods, extending it even to women. It is worth recalling that in *The Republic*, Plato describes the "*kolvovía*"⁶³ as the communal organisation of the guardians of the ideal city, who share property, women, and children. This arrangement is not primarily economic or familial in purpose, but political: it seeks to eliminate private interests that might generate conflict and to ensure that the guardians consistently act for the common good of the *polis* ("πόλις"). In this framework, property, family, and offspring cease to be individual possessions and become collective, thereby reinforcing the unity and stability of the city.

The information provided by Erasmus about the existence of this dialogue, which More composed on a paradoxical premise, is particularly revealing. As will be discussed below, Erasmus also offers key interpretative guidance for reading Utopia. The humanist of Rotterdam explains that More conceived the work as an extension of that rhetorical exercise, shaped by paradox and political critique ("*Utopiam hoc consilio edidit (printed: aeditit),⁶⁴ ut indicaret quibus rebus fiat ut minus commode habeant respublicae*").⁶⁵

In other words, in this imagined commonwealth (Utopia), the humanist develops a political and social model which, although presented as rational and ideal, comes into conflict with the customs, values and institutions of the Europe of his time. The paradox lies, above all, in the fact that the abolition of private property and, to some extent, of traditional family ties is presented as the means to achieve a more just, stable and virtuous society. In this way, the English scholar takes ideas that in Plato applied solely to the class of guardians and extends them to the whole of the utopian social organisation. The paradoxical nature of the work arises because what is normally regarded as the foundation of social order, such as private property, the family or self-interest, appears in this ideal society as the source of corruption and conflict. Thus, the work constantly plays on the ambiguity between a serious critique of contemporary society and the provocative intellectual exercise characteristic of the humanist tradition. In light of Erasmus's letter, we can better understand contemporary scholars such as Antonio Poch. For this author, the idea of utopia constitutes an imaginary and critical construct conceived not so much for

⁵⁶ (Erasmus, 1922, p. 21).

⁵⁷ The printed text reads "aeditit", but this should be corrected to "edidit". The orthographic confusion characteristic of medieval and Renaissance Latin; in the manuscript and printed tradition, there was frequent hesitation between the long "e" and the diphthong "ae", which gave rise to erroneous forms such as "aeditit", "aeditio" or "aeditit" librum instead of the correct "edidit" and "editio". (Harrington, Pucci & Elliott, 1997, p. 2).

⁵⁸ (Erasmus, 1922, p. 21).

⁵⁹ (Erasmus, 1922, p. 21).

⁶⁰ José Miguel Sangüillo refers to a paradox as an argument in which true premises and valid reasoning appear to lead to a false conclusion. (Sangüillo, 2023, pp. 12–13).

⁶¹ (Pozuelo Yvancos, 2024, p. 196).

⁶² (Santos Fernández, 2025, p. 159).

⁶³ Frequently translated as "communion", "participation" or "community". (Mesquita, 2018, pp. 209–210).

⁶⁴ See note 57.

⁶⁵ (Erasmus, 1922, p. 21).

practical implementation as for challenging the existing reality.⁶⁶ Furthermore, the letter alludes to Lucian of Samosata's *Tyrannicide*, a rhetorical treatise addressing the question of whether it is legitimate to kill a tyrant. More translated this work into Latin and also added his own response as an exercise in counterargumentation against its central argument. Erasmus specifically refers to More's reply in the *Tyrannicide* to illustrate that learning arises from dialogue and from the confrontation of opposing ideas.

Taken together, these early works should not be read as a mere biographical anecdote, but rather as the development of a genuine intellectual laboratory from which Utopia would later emerge. In this sense, the work does not arise from fantasy, but from a mode of thought inherited from classical humanism. It is a disciplined practice that explores, defends, and pushes philosophical ideas, especially those of Plato, to their limits, so that they become instruments for interrogating reality and revealing its boundaries.

Erasmus further argues that the work draws its inspiration from England, a country with which he was intimately familiar. This suggests that More does not construct a wholly abstract world, but rather bases his vision on English reality. The Rotterdam scholar's observation is accurate, as the English author alludes to specific political contexts, such as diplomatic embassies and enclosure laws, amongst others, as will be demonstrated in the section devoted to the commentary on selected passages from More's work.

Secondly, with regard to the order of composition, this interpretation maintains that More wrote the second book first, during a period of calm reflection, and that he later added the first book more quickly and spontaneously, seizing a favourable opportunity. Finally, from a stylistic perspective, this compositional process would explain certain inconsistencies in the text, as some passages are more elaborate and reflective in nature. In contrast, others have a more spontaneous tone: "*sed Britannicam potissimum effinxit, quam habet penitus perspectam eognitamque. Secundum librum prius scripserat per ocium, mox per occasionem primum adiecit ex tempore. Atque hinc nonnulla dictionis inaequalitas*".⁶⁷

The letter then highlights the exceptional *ingenium* of the English scholar. His portrait is constructed from a combination of natural intelligence, a perfect memory ("in numerato")⁶⁸ and a great capacity for verbal improvisation ("ex tempore"),⁶⁹ which makes him a virtually unbeatable opponent in intellectual debate.

To reinforce this idea, John Colet is quoted, a man of sharp and precise judgement, who used to assert in family conversations that in all of Britain there was a single truly singular intellect, despite the abundance of notable talents on the island ("Ioannes Coletus [...] dicere solet Britanniae non nisi unicum esse ingenium").⁷⁰

*Vix alium reperias qui felicius dicat ex tempore: adeo felici ingenio felix lingua subseruit. Ingenium praesens et ubique praeuolans, memoria parata; quae eum omnia habeat velut in numerato, prompte et incontinenter suggerit quicquid tempus aut res postulat. In disputationibus nihil fingi potest acutius, adeo ut summis etiam theologis saepe negotium facessat, in ipsorum harena versans. Ioannes Coletus, vir acris exactique iudicii, in familiaribus colloquiis subinde dicere solet Britanniae non nisi unicum esse ingenium: cum haec insula tot egregiis ingeniis floreat.*⁷¹

Moving on in the letter, Erasmus describes the English king Henry VIII as a prudent prince who not only welcomes men of great virtue

into his circle, but also brings them into his household and cabinet, actively seeking them out as advisers, witnesses to his life and travelling companions. In this way, he prefers their company to that of corrupt, sycophantic or disloyal courtiers, whose influence often leads to disorder, tyranny or the corruption of government. Against this positive image of the English court, Erasmus introduces Hutten's critical stance, noting that, were he to know this Court, he would likely qualify his general rejection of courtly circles, despite living himself under a prince of great integrity. As a further point, Hutten was linked to influential court circles, having been part of King Albert of Brandenburg's circle of friends.

Finally, he emphasises that what is truly remarkable is the group of great humanists and scholars surrounding the king, Henry VIII, among whom he cites Thomas Linacre (c. 1460–1524), Richard Pace (c. 1482–1536), John Colet (c. 1467–1519), More (1478–1535) and Cuthbert Tunstall (1474–1559), each of whom embodies a compendium of virtues and learning. Finally, Erasmus expresses his hope that Albert of Brandenburg (1490–1545),⁷² considered one of the most prominent figures of his time in the Holy Roman Empire, will bring into his circle other men of equal virtue and learning, and his conduct will serve as a model for other princes, inspiring them to emulate this ideal of an enlightened court.

*Tales viros cordatissimus Rex in familiam suam atque adeo in cubiculum non solum admittit verumetiam inuitat; nec inuitat modo verumetiam pertrahit. Hos habet arbitros ac testes perpetuos vitae hos habet in consilis, hos habet itinerum comites. Ab his stipari gaudet potius quam luxu perditis iuuenibus aut mulierculis, aut etiam torquatis Midis, aut insynceris officiis; quorum alius ad voluptates ineptas auocet, alius ad tyrannidem inflammet, alius ad expilandum populum nouas technas suggerat. In hac aula si vixisses, Huttene, sat scio rursum aliam Aulam describeres, et misaulos esse desineres: quanquam tu quoque cum eo Principe viuis vt integriorem nec optare possis. Neque desunt qui rebus optimis faueant, veluti Stromerus ac Coppus. semel dixeris. Sed quid ista paucitas ad tantum examen insignium virorum, Montioii, Linaeri, Pacei, Coleti, Stoeschleii, Latimeri, Mori, Tunstalli, Clerici atque aliorum his adsimilium? quorum quemeunque nominaris, mundum omnium virtutum ac disciplinarum Mihi vero spes est haud quaquam vulgaris fore ut Albertus, unicum his temporibus nostrae Germaniae ornamentum, et plures sui similes in suam allegat familiam, et caeteris principibus graui sit exemplo, vt idem et ipsi suae quisque domi facere studeant. Habes imaginem ad optimum exemplar a pessimo artifice non optime deliniatam.*⁷³

In conclusion, Erasmus presents More as a humanist who combines his political activity at the Court of Henry VIII with deep intellectual engagement and strong moral rigour. His defining characteristic is his "*ingenium*", a form of creative intelligence that unites political practice and writing. This ingenuity is particularly evident in *Utopia*, which should not be read as a literal political proposal, but rather as an exercise in paradox ("ἀδωα") used to interrogate reality. Thus, More's life and work constitute a unified whole, since his experience in public office is transformed through intellectual ingenuity into a critical reflection on politics.

⁶⁶(Poch, 2008, p. LXXII).

⁶⁷(Erasmus, 1922, p. 21).

⁶⁸(Erasmus, 1922, p. 21).

⁶⁹(Erasmus, 1922, p. 21).

⁷⁰(Erasmus, 1922, p. 21).

⁷¹(Erasmus, 1922, p. 21).

⁷²Hugh Chisholm discusses Hutten's friendship with Albert. (Chisholm, 1911, p. 496). Heinrich Grimm writes a biography of Albert of Brandenburg. (Grimm, 1953, pp. 166–167).

⁷³(Erasmus, 1922, p. 22).

5. Commentary on selected passages from Utopia

5.1. The dispatch of a diplomatic mission regarding the wool trade

I shall comment on the opening of Utopia; specifically, the text refers to a particular historical moment linked to the wool trade. In More's time, fabrics produced in Flanders were freely imported into England, whilst Flemish ports remained open to English wool. However, this balance was disrupted when the planned marriage between Prince Charles V, son of Philip the Handsome, and Princess Mary, sister of Henry VIII, was called off, prompting the English government to react by banning the export of wool to Holland and Zeeland.

It soon became clear that this measure was detrimental to both English and foreign interests. Consequently, in May 1515, an embassy was sent to the Netherlands in order to restore the balance of trade; More participated in this as a junior member. The situation required great diplomatic skill, which is why the mission's leadership was entrusted to Cuthbert Tunstall.⁷⁴ The embassy finally achieved its objectives, and More returned to London towards the end of that same year; it was in this context that Utopia was conceived.⁷⁵ The Latin passage of the work, where reference is made to that moment, reads as follows:

*Quum non exigui momenti negotia quaedam invictissimus Angliae Rex Henricus eius nominis octavus, omnibus egregii principis artibus ornatissimus, cum serenissimo Castellae principe Carolo controversa nuper habuisset, ad ea tractanda componendaque oratorem me legavit in Flandriam, comitem et collegam viri incomparabilis Cuthberti Tunstalli, quem sacris scriniis nuper ingenti omnium gratulatione praefecit, de cuius sane laudibus nihil a me dicitur, non quod verear ne parum sinceræ fidei testis habenda sit amicitia, sed quod virtus eius ac doctrina maior est quam ut a me praedicari possit, tum notior ubique atque illustrior quam ut debeat, nisi videri velim solem lucerna, quod aiunt, ostendere. Occurrerunt nobis Brugis (sic enim convenerat) hi, quibus a principe negotium demandabatur, egregii viri omnes. In his praefectus Brugensis vir magnificus, princeps et caput erat, ceterum os et pectus Georgius Temsicius Cassiletanus Praepositus, non arte solum, verum etiam natura facundus, ad haec iure consultissimus, tractandi vero negotii cum ingenio tum assiduo rerum usu eximius artifex. Ubi semel atque iterum congressi, quibusdam de rebus non satis consentiremus, illi in aliquot dies vale nobis dicto, Bruxellas profecti sunt, principis oraculum sciscitaturi.*⁷⁶

In the passage cited above, the scholar recounts that he was sent to Flanders on a diplomatic mission with the aim of negotiating and resolving certain significant economic disputes concerning the wool market, which had arisen between the King of England, Henry VIII, and the Prince of Castile, Charles V. He was part of this embassy alongside Tunstall, a figure of great prestige recently appointed head of the royal archives, whose qualities were so widely recognised that it was unnecessary to extol them. He notes that, as agreed, the delegation met in Bruges with the prince's representatives, all of them distinguished men. Although the city prefect held the principal position, the man who played a decisive role in the negotiations was George Temse, noted for his eloquence, his profound knowledge of law, and his great skill in diplomatic practice. After several meetings, no agreement was reached on certain points, so the prince's delegates set off for Brussels to consult on their decision.

5.2. Portrait of Petrus Aegidius (Pieter Gillis) and Raphael Hythloday

More further explains that, driven by circumstances, he moved to Antwerp. During his stay there, he received frequent visits from Petrus Aegidius, a native of the city, whom he considered particularly agreeable among all. He describes him as a dignified and respected man whose qualities stood out both for his education and his character. According to More, Aegidius possessed exceptional virtues: he was learned, upright, and showed a sincere disposition towards everyone, especially his friends, to whom he offered uncommon affection and loyalty.

He adds that Aegidius possessed extraordinary modesty, free from any pretence, and a natural prudence combined with great simplicity. He also highlights his conversation skill, which was always pleasant and free from malice. Thanks to his warm manner and pleasant conversation, More states that he managed to alleviate much of the homesickness he felt for his homeland, his home, his wife and his children, from whom he had been separated for more than four months.

*Ego me interim (sic enim res ferebat) Antuerpiam confero. Ibi dum versor, saepe me inter alios, sed quo non alius gratior, invisit Petrus Aegidius Antuerpiae natus, magna fide et loco apud suos honesto, dignus honestissimo, quippe iuvenis haud scio doctiorne an morator. Est enim et optimus et litteratissimus, ad haec animo in omnes candido, in amicos vero tam propenso pectore, amore, fide, affectu tam sincero, ut vix unum aut alterum usquam invenias, quem illi sentias omnibus amicitiae numeris esse conferendum. Rara illi modestia, nemini longius abest fucus, nulli simplicitas inest prudentior, porro sermone tam lepidus, et tam innoxie facetus, ut patriae desiderium ac laris domestici, uxoris, et liberorum, quorum studio revisendorum nimis quam anxie tenebar (iam tum enim plus quattuor mensibus afueram domo), magna ex parte mihi dulcissima consuetudine sua, et mellitissima confabulatione levaverit.*⁷⁷

Moreover, More recounts that, after attending services at the Church of the Virgin Mary, a place renowned both for its beauty and for the throng of worshippers, he was preparing to return to his lodgings when he observed Aegidius conversing with an unknown man. That individual, of advanced years, with a weather-beaten face and a dishevelled appearance, gave him the impression of being a seafarer.

Noticing his presence, Petrus Aegidius greeted him and gently led him aside to point out a stranger, saying that he wished to introduce them. More replied that any recommendation from Aegidius was sufficient reason to welcome the meeting. Yet, his companion insisted that the traveller merited admiration on his own account, for no one could describe so many unfamiliar lands and peoples with equal experience and authority, subjects he knew would deeply interest More. Although More believed he had been right in assuming he was a sailor, Aegidius qualified that idea by pointing out that he had not sailed like Palinurus, the experienced helmsman of Aeneas' ship, who falls asleep whilst steering the fleet towards Italy (Verg. Aen. 5, 855-860), but rather like Ulysses, and even like Plato, that is to say, driven by a desire to learn and reflect.⁷⁸ He then introduced Raphael Hythloday, whom he describes as a learned man, particularly well-versed in Greek and deeply devoted to philosophy. Aegidius adds that, after ceding his inheritance to his brothers in

⁷⁴(Hill, 2024, pp. 52–60).

⁷⁵(Lupton, 1895, p. xxvii).

⁷⁶(Morus, 1548, pp. 27–28).

⁷⁷(Morus, 1548, pp. 28–29).

⁷⁸(More, 2012, p. 30).

Portugal, Hythloday joined Amerigo Vespucci,⁷⁹ driven by a desire to discover the world, and accompanied him on several voyages.

Finally, he explains that, on the last expedition, Hythloday decided to remain in distant lands alongside other men, driven more by his desire to explore than by any intention of returning. According to the account, he lived by the belief that no specific place is needed for burial, for “the sky covers him who has no grave” (Caelo tegitur qui non habet urnam) (Lucan. 7, 819) and that the divine can be attained from anywhere.

In More’s work, Hythloday appears as an observer who travels to different parts of the world. The verse, inserted into the text and attributed to Lucan, reinforces this image by suggesting that his only “roof” is the sky; that is, he is not bound to a grave, a territory, or a local identity. In this way, it symbolises his cosmopolitan nature, as he is defined not by any specific city or nation, but by belonging to the world as a whole.

Hunc quum die quadam in templo divae Mariae, quod et opere pulcherrimum, et populo celeberrimum est, rei divinae interfuissem, atque peracto sacro pararem inde in hospitium redire, forte colloquentem video cum hospite quodam, vergentis ad senium aetatis, vultu adusto, promissa barba, paenula neglectim ab humero dependente, qui mihi ex vultu atque habitu nauclerus esse videbatur. At Petrus, ubi me conspexit, adit ac salutat. Respondere conantem seducit paululum, et Vides, inquit, hunc? (Simul designabat eum cum quo loquentem videram.) Eum, inquit, iam hinc ad te recta parabam ducere. Venisset, inquam, pergratus mihi tua causa. Immo, inquit ille, si nosset hominem, sua. Nam nemo vivit hodie mortalium omnium, qui tantam tibi hominum, terrarumque incognitarum narrare possit historiam. Quarum rerum audiendarum scio avidissimum esse te. Ergo, inquam, non pessime coniectavi: nam primo aspectu protinus sensi hominem esse nauclerum. Atqui, inquit, aberrasti longissime; navigavit quidem non ut Palinurus, sed ut Ulysses, immo, velut Plato. Nempe Raphael iste, sic enim vocatur gentilicio nomine Hythlodaeus, et Latinae linguae non indoctus, et Graecae doctissimus (cuius ideo studiosior quam Romanae fuit, quoniam totum se addixerat philosophiae; qua in re nihil quod alicuius momenti sit praeter Senecae quaedam ac Ciceronis exstare Latine cognovit), relicto fratribus patrimonio quod ei domi fuerat (est enim Lusitanus), orbis terrarum contemplandi studio Americo Vesputio se adiunxit, atque in tribus posterioribus illarum quattuor navigationum, quae passim iam leguntur, perpetuus eius comes fuit, nisi quod in ultima cum eo rediit. Curavit enim atque adeo extorsit ab Americo, ut ipse in his XXIII esset qui ad fines postremae navigationis in castello relinquebantur. Itaque relictus est uti obtemperaretur animo eius, peregrinationis magis quam sepulchri curioso: quippe cui haec assidue sunt in ore, Caelo tegitur qui non habet urnam [=Lucan. 7, 819], et Undique ad superos tantundem esse viae.⁸⁰

I would like to focus on the description of the character Hythloday, whom he identifies with Ulysses (navigavit [...] sed ut Ulysses)⁸¹ since, like the Greek hero, he is a man who has travelled extensively and is familiar with the customs of different countries (“orbis terrarum contemplandi studio Americo Vesputio se adiunxit”).⁸² Furthermore, he is presented as a learned man, with a profound knowledge of the Greek language and also of Latin; it is also noted that he was a man devoted to philosophy and who scorned material possessions (“Latinae linguae non indoctus, et Graecae doctissimus [...] studiosior quam Romanae fuit, quoniam totum se addixerat

philosophiae [...] relicto fratribus patrimonio).⁸³ Next, I quote the verses⁸⁴ from Homer’s *Odyssey*, which could serve as a model for the description of Hythloday. Thus, the words of the Greek epic poet continue: “νδρα μοι νεπε, Μοσα, πολότροπο, δζ μάλα πολλά / πλάγθη, έπει Τροίηζ ιερών ποτλίεθον έπερσεν. / πολλν δ’ άνθρόπων δεν άοτεα καί νόον έγνώ”. “Tell me, Muse, of the resourceful man, who wandered for a long time after destroying the sacred city of Troy; he saw the cities of many men and came to know their ways of thinking” (Hom. Od. 1, 13).⁸⁵ In *Ars Poetica*, Horace uses Homer’s verses to express the idea that one who travels widely and sees much also knows much. : “Dic mihi, Musa, uirum, captae post tempora Troiae / qui mores hominum multorum uidit et urbes” (Hor. Ars 141–142). This can be translated as: “Tell me, Muse, of the man who, after the fall of Troy, came to know the customs of many men and saw their cities.”

I also cite another passage from Horace’s *Epistles*, which presents a different version of the same verse: “qui domitor Troiae multorum prouidus urbes, et mores hominum inspexit, latumque per aequor”. (Hor. Epist. 1, 2, 17–22).⁸⁶ “He who, conqueror of Troy, prudent among many cities, examined the customs of men and (sailed) across the wide sea.”

The Socratic philosopher Antisthenes tends to offer an ethical interpretation of Ulysses; he associates the term “πολότροπος” with both the manner of being and the manner of speaking of the wise Homeric hero. Thus, he continues:

Μποτε ον τρόπος τὸ μν τι σημαίει τὸ ἦθος, τὸ δ τι σημαίει τν το λόγον χρσιν [...] έπιτάμε δε πολλοὺζ τρό πει το αο, πολύτπ αν ειεν. ει δε οι σοφι και άγαθοι ειολ, δια τοτό φησι τὸν Οδνσέα Ομηρο σφὸν ντα πολότροπν ειναί, Ότ δι τοζ άνθρόποζ ηπίοτατο πολλοζ τρόπ συνεναί.⁸⁷

“Perhaps, then,” τρόπος” means, on the one hand, character, and on the other, the use of speech. And those who know many ways of speaking about the same thing would be versatile. And if the wise and good are so, that is why Homer says that Odysseus, being wise, is ‘resourceful’ (πολότροπος), because he knew how to deal with men in many ways”.

The passage revolves around the Greek word “τρόπος”, which has a fairly broad semantic field. Here, it is precisely this ambiguity that is exploited to develop an ethical and rhetorical idea. First, the text proposes a key distinction in which “τρόπος” can mean “character” (“ἦθος”), that is, a person’s moral disposition, or the manner of speaking or using discourse (“λόγος”). This dual meaning is no accident; in Greek culture, ethics and rhetoric are deeply interconnected.

From this point, an interesting consequence emerges. Those who master many “τρόπο” of discourse, that is, different ways of expressing the same idea, are called “πολύτροπο”, meaning versatile or adaptable. This is not merely a technical skill but a practical virtue: the ability to adjust one’s discourse to the situation and to the interlocutor. The argument culminates with Homer’s presentation of Odysseus (Ulysses) as an example. Homer describes Odysseus as “πολότροπος”, a term usually translated as “resourceful” or “cunning”. Here, however, the term more precisely means that he is not only ingenious but also capable of relating to different types of people in multiple ways. Herman Josef Polak (18441908) proposes a series of corrections to the cited text in order to better clarify what Antisthenes intended. In his work *Emendationes ad scholia in Homeri Odysseam*, he revises the passage attributed to

⁷⁹Americus Vesputius (1454–1512), or Amerigo Vespucci, was a famous explorer, cartographer, and chronicler of voyages to the New World. The Americas are named after him. (More, 2012, p. 30).

⁸⁰(Morus, 1548, pp. 29–30).

⁸¹(Morus, 1548, p. 29).

⁸²(Morus, 1548, p. 30).

⁸³(Morus, 1548, pp. 29–30).

⁸⁴(Horace, 2010, p. 135).

⁸⁵(Homer, 1919, p. 12).

⁸⁶(Horace, 2010, p. 135).

⁸⁷(Polak, 1869, p. 50; Garriga, 2015–2016: 44).

Antisthenes. Whereas the transmitted reading states: “διὰ τοῦτο φησὶ τὸν Ὀδυσσεύα Ὁμηρος σοφὸν ντα πολύτροπον εἶναι, ὅτ δὲ τοῦ ἀνθρώπου ἥπιότατο πολλοὺς τρόπους συνεῖναι”, Polak proposes the correction: “διὰ τοῦτο φησὶ τὸν Ὀδυσσεύα Ὁμηρος ἀγαθὸν ὄντα πολύτροπον εἶναι”. His justification for replacing “σοφός” with “ἀγαθός” rests on the idea that the wise man (“ὁ σοφός”) is also good (“ἀγαθός”), a view characteristic of the Socratic tradition, in which Antisthenes holds a prominent position.

Furthermore, he argues that the reading “πονηρός”, an adjective that appears a few lines earlier and describes Ulysses, should be corrected. He notes that this must have been an error by a grammarian or a reader.⁸⁸ Polak concludes by emphasising the positive value of the term “πολύτροπος”,⁸⁹ which is why the expression “ἡ δὲ λόγον πολιορκία” is used to indicate that skill and dexterity in speech is a virtue.⁹⁰

In line with Polak’s observation regarding the substitution of “σοφός” for “ἀγαθός”, the correlation between knowledge and virtue constitutes a recurring motif in the classical tradition. Far from emerging suddenly in later rhetorical theory, the assimilation of the “wise man” (“ὁ σοφός”) with the “good man” (“ἀγαθός”) is embedded in a gradual process of conceptual development. This connection is rooted in the thought of the Socratic philosophers, among whom Antisthenes occupies a prominent position. In this sense, when Quintilian defines the ideal orator as the *vir bonus dicendi peritus* (Quint. Inst. 12, 1, 1), he is not introducing an original idea, but rather drawing upon, systematising, and transferring into the field of rhetoric a well-established ethical tradition.

As David Fleming notes, this association between rhetorical skill and civic virtue does not constitute an original contribution by Quintilian.⁹¹ Within this framework, it may be argued that earlier traditions helped to consolidate the idea that true eloquence is not reducible to technical competence, but rather depends on the moral character of the speaker. In other words, the ideal orator is not only someone who masters the art of speaking, but also someone who possesses a fundamentally ethical disposition.

Consequently, this model of the orator must combine technical excellence and mastery of rhetoric with, above all, moral integrity; ultimately, eloquence without virtue cannot be regarded as true eloquence.

⁸⁸ *Res ipsa clamat dixisse Anthisthenem: διὰ τοῦτο φησὶ τὸν Ὀδυσσεύα Ὁμηρος ἀγαθὸν ὄντα πολύτροπον εἶναι, ὅτ δὲ σοφὸς αὐτὸς non potest non ἀγαθός esse: itaque qui πολύτροπος, idem ἀγαθός est. Est hic argumentandi modus cum omnium philosophorum, qui Socratis sectam secuti sunt, tum in primis Antisthenes dignus, Stoicorum antecursore et quasi auctore. Sic igitur crimen quod in ἀπορίᾳ posuerat dilutum est videlicet, nec amplius Ulixes πονηρὸς habendus ὅτι πολύτροπος ἐκλήθη. Comprobantur haec omnia exemplo Pythagorae pro variis hominum generibus vario sermonis genere uti soliti et medicorum, qui, tu corporis constitutio non est eadem in singulis, ita in simili morbo dissimilia medicamenta adhibere consueverunt. Itaque τρόπον μὲν οὐ τὸ παλὶμβόλον, τὸ τὸ ἥθους πολυμετάβολον! Haud uidi magis! Et tota disputatione hoc unum agitur tu demonstraretur, haec non ita esse! At uero ista uerba non Anthisthenes esse possunt, non Porphyrii, sed inepti cuiusdam grammatici dicam an lectoris.* (Polak, 1881, p. 16).

⁸⁹ It should be noted that the positive attitude towards Ulysses was not always the case in antiquity; much later, Eustathius understood πολύτροπος in the sense of someone who is “πολιόφρων”, meaning one who “makes use of deceit and stratagems”, that is to say, he understood it as something negative, a characterisation he attributes to Odysseus (Ulysses). This is the interpretation given by Eustathius in his commentary on the *Odyssey* 1.1, which reads as follows: “πολύτροπος οὐκ, ὁ δὲ πολλὰν ἐμπερίαν πολέων ὡς ὁ ποιητὴς μετ’ ὀλίγα ἐρεῖ. And as Euripides might say, ‘of many ways’” (Eust. Op. 1380, 39–40). (Eustathius, 1825, p. 2).

⁹⁰ *Hucusque philosophus, in explicanda natura τῆς λόγον πολιορκίας occupatus, non sine sophistica arte probare adgressus est, ea non uitium notari sed sollertiam adeoque uirtutem. λόγον δὲ πολιορκία καὶ χρῆσις ποίησις λόγον εἰς ποικίλας ἀκοὰς μοστροπία γίεται. ν γὰρ τὸ ἐκάστου οὐκ οὐδὲν καὶ τὸ ἀρμόδιον ἐκάστου τὴν ποίησιν τοῦ λόγου εἰς ν συαγερε τὸ ἐκάστου ῥόσο. τὸ δ’ αὖ μοσιδεῖ, ἀνάμωστο τὸν ῥὸς ἀκοὰς διαφώνων πολλὴν ποιεῖ τὸν ἄλλου σπὸ πολλὰν ἀπόβλητον ὡς αὐτοῦ ἅπτην λόγον.* (Polak, 1881, pp. 16–17).

⁹¹ (Fleming, 2018, p. 397).

The comparison with Ulysses as a literary trope also appears in a letter from Juan Luis Vives addressed to Gilles Wallop.⁹² It was probably written in Oxford, judging by the reference to his teaching work with young people. However, it is difficult to distinguish precisely between the stages of his life in London and in Oxford.⁹³ Vives describes Wallop’s brother as a person esteemed for his efficiency and for his “*virtus animi*”. Furthermore, he notes that his discourse was particularly valued in numerous matters, for, like Ulysses (“uelut Ulysses”),⁹⁴ he had travelled widely and was familiar with the customs and languages of various countries. In the passage under discussion, Vives paraphrases in Latin a well-known passage from the *Odyssey* (Hom. Od. 1, 3): “multas regiones adierit, moresque hominum cognorit”⁹⁵ (“he travelled through many regions and came to know the customs of men”). This phrase directly paraphrases the Homeric verse “πολλὰν δ’ ἀνθρώπων ἴδεν ἄοτα καὶ νόον γυνώ” (Hom. Od. 1, 3),⁹⁶ in which Homer states that the hero saw the cities of many peoples. The expression “καὶ νόον γυνώ” is understood to mean that he came to know their ways of thinking and their customs.

*Vives Aegidio Gualopo suo. S. Coluquutus sum in Regia saepe numero cum fratre tuo, qui de strenuitate, et animi uirtute carus est Regi, Reginae, ac ceteris Britanniae Principibus. Fuit et de alis per multis rebus nobis sermo, quum ille uelut Ulysses quidam multas regiones adierit, moresque hominum cognorit, et linguas calleat.*⁹⁷

6. The laws on enclosures and public health in Utopia

To better understand Utopia as a “legislative laboratory”, it is essential to consider the author’s biography, as the work stems not solely from imagination but also from More’s political and institutional experience. The humanist served in the English Parliament and rose to a position of high responsibility at the court of Henry VIII, which allowed him to gain first-hand knowledge of the actual workings of power, the administration of justice, and the social problems of his time.

From this perspective, Utopia should not be interpreted simply as an external critique or as a fantasy detached from reality, but rather as an intellectual projection of someone actively involved in the institutional system. Many of the ideas presented in the work can be understood as reflections on possible improvements to the political and legal order, arising from the direct experience of someone familiar with the limitations and tensions of government. However, the work also implicitly raises a reflection on the complexity of social life: society is composed of groups with different, and often conflicting, interests. Consequently, any legal provision that benefits one sector may harm another. For example, a regulation that favours the expansion of livestock farming may conflict with the interests of arable farming, and vice versa, since both depend on different uses of land.

⁹² (Watson, 1918, p. 108).

⁹³ Juan Luis Vives (1492–1540) was a Spanish humanist, philosopher and educator from the Kingdom of Valencia. He became a reformer of European education and a moral philosopher of universal stature, advocating the study of Aristotle’s works in their original language and adapting his books intended for the study of Latin for students; he replaced medieval texts with new ones, using vocabulary suited to his era and the contemporary way of speaking. Carlos Mallaina (1817–1885) asserts that Juan Luis Vives was one of the most important men of the Spanish nation and the true driving force behind the literary reform of the 16th century. (Mallaina, 1872, pp. 64–65, 156).

⁹⁴ (Vives, 1788, p. 208).

⁹⁵ (Vives, 1788, p. 208).

⁹⁶ (Homer, 1919, p. 12).

⁹⁷ (Vives, 1788, p. 208).

In this way, the legislative experiment not only illustrates the transformative capacity of law, but also exposes its structural limitations and the difficulty of designing perfectly balanced legislation in a context where benefits and harms are never distributed evenly. In light of the above, I shall now examine several laws and regulations that appear in the work and which, as we shall see, have clear counterparts in the real world and in English legislation of the period.

I begin with the preamble to a law passed almost simultaneously with the writing of More's work (7 Hen. VIII, ch. I) states that great inconveniences exist and are increasing daily due to the desolation, demolition and destruction of houses and settlements within the kingdom, as well as the conversion into pasture of lands that had traditionally been cultivated through tillage and agriculture, which increases idleness.⁹⁸ The year 1516 marks a turning point in English rural historiography; whilst Parliament sought to curb the phenomenon of enclosures through legislation, More published his *Utopia*, denouncing a reality in which commercial ambition was beginning to displace the peasant from his traditional livelihood. Subsequently, Cardinal Wolsey's Commission of 1517 was a research initiative launched to combat the social and economic effects of the enclosures of common land in England.⁹⁹ The reference to the 1516 Act of Parliament on the state of agriculture is inseparable from More's work. Specifically, in Book I of *Utopia*, More criticises the social and economic conditions of England in his time. In this section, he famously describes sheep as becoming so voracious that they "devour men", using this striking image to show how the expansion of sheep farming was driving people from their lands and livelihoods (Oves [...] nunc (uti fertur) tam edaces atque indomitae esse coeperunt, ut homines devorent ipsos);¹⁰⁰ More was aware that the laws of the time were insufficient to protect the poor from the greed of the nobility, who prioritised profits from the wool trade over the livelihoods of farmers. As a member of Parliament, he had first-hand knowledge of the needs of the people. The passage quoted below forms part of his critique of the enclosure movement in England, through which common lands were privatised for sheep farming, leading to the displacement of peasants and an increase in poverty.

*Neque haec tamen sola est furandi necessitas. Est alia magis, quantum credo, peculiaris vobis. Quenam est ea? inquit Cardinalis. Oves, inquam, vestrae, quae tam mites esse, tamque exiguo solent ali, nunc (uti fertur) tam edaces atque indomitae esse coeperunt, ut homines devorent ipsos; agros, domos, oppida uastent ac depopulentur. Nempe quibus cunq[ue] regni partibus nascitur lana tenuior, atque ideo preciosior, ibi nobiles et generosi, atque adeo Abbates aliquot, sancti uiri, non his contenti redditibus fructibusque annuis, qui maioribus suis solebant ex praediis crescere; nec habentes satis, quod ociose ac laute uiuentes nihil in publicum prosint, nisi etiam obsint; arvo nihil relinquunt, omnia claudunt pascuis, demoliuntur domos, diruunt oppida, templo duntaxat stabulandis suis relicto et tan quam parum soli perderent apud uos ferarum saltus ac uiuaria, illi boni uiri habitationes omnes, et quicquid usquam est culti, uertunt in solitudinem.*¹⁰¹

"And yet this is not the only reason for plundering; there is another, in my opinion, more characteristic of you. 'What is it?' said the cardinal. 'Your sheep,' I said, 'which are usually so tame and feed on so little, have now become so voracious and untameable that they devour even men; they ravage the fields, the houses and the villages, and lay everything waste. For in all those regions of the kingdom where finer, and therefore more valuable, wool is produced,

there the nobles and gentlemen, and even some abbots, holy men, not content with the annual rents and produce that their ancestors used to obtain from their estates, nor considering it sufficient to live idly and in luxury without contributing anything to the public good, but rather harming it, leave nothing for cultivation: they enclose everything for pasture, tear down the houses, destroy the villages, leaving only the church to serve as a sheepfold. And as if it were not enough to ruin so much land, as if they did not already destroy enough soil, these good men turn all dwellings and everything that was once cultivated anywhere into a desert".

In *Utopia*, through its spokesman Hythloday, it is proposed that a law be enacted whereby those who razed farms and agricultural villages must rebuild them or else surrender and hand over their property to those willing to bear the cost of rebuilding, in line with the proposals made by Parliament¹⁰² in 1516.¹⁰³

*Has perniciosas pestes eiicite, statuete ut uillas atque oppida rustica aut hi restituant qui diruere, aut ea cedant reposituris atque aedificare uolentibus. Refrenate coemptiones istas diuitum, ac uelut monopolii exercendi licentiam. Pauciores alantur ocio, reddatur agricolatio, lanificium instauretur, ut sit honestum negotium, quo se utiliter exerceat ociosa ista turba, uel quos hactenus inopia fures fecit, uel qui nunc erronei aut ociosi sunt ministri, fures nimirum utrique futuri. Certe nisi his malis medemini, frustra iactetis exercitum in uindicanda furta iusticiam, nempe speciosam magis quam aut iustam aut utilem. Siquidem quum pessime sinitis educari, et mores paulatim ab teneris annis corrumpi, puniendos uidelicet turn demum quum ea flagitia uiri designent, quorum spem de se perpetuam a pueritia usque praeberant, quid aliud, quaeso, quam facitis fures, et iidem plectitis?*¹⁰⁴

In *Utopia*, we once again see a reflection of the humanist's concerns, in this case regarding public health. In 1514, the scholar was appointed by as a commissioner for sewerage, and in 1532 he was responsible for introducing the Statute of Sewerage (23 Henry VIII, Chapter 5) into legislation.¹⁰⁵ In Book II, when describing the ideal city of Amaurota, the system for channelling clean water suitable for domestic use is outlined, taking into account the characteristics of the terrain depending on whether the areas are high or low-lying:

*Inde canalibus coctilibus, diuersim ad inferiores urbis partes aqua diriuatur, id sicubi locus fieri uetat, cisternis capacibus, colleca pluuiarum, tantndem usu ader.*¹⁰⁶

"From there, through channels of fired brick, water is channelled in various directions towards the lower parts of the city; and where the terrain prevents this, rainwater, collected in large cisterns, provides the same service."

Furthermore, the text describes how health and hygiene conditions are managed in Amaurota on market days, when fruit, vegetables, fish and meat are sold. It highlights a hygiene-oriented system, as food is cleaned outside the city before sale, thus preventing waste and dirt from entering the urban area and ensuring adequate sanitary conditions:

*Adiuncta sunt foris (quae commemorauimus) fora cibaria, in quae non olera modo, arborumque fructus et panes comportantur, sed pisces praeterea quadrupedumque et auium quicquid esculentum est, extra urbem locis appositis ubi fluente tabum ac sordes eluantur.*¹⁰⁷

"Next to the market square I mentioned are food stalls where all manner of vegetables and fruit from the trees are brought, along with bread, as well as fish and all kinds of four-legged animals and

⁹⁸(Lupton, 1895, p. xxxv).

⁹⁹(Great Britain. Commissioners of Inclosures, pp. 9–10).

¹⁰⁰(Morus, 1548, p. 42).

¹⁰¹(Morus, 1548, p. 42).

¹⁰²(Finberg, 1967, pp. 70–75; Elton, 1955, pp. 71–73).

¹⁰³(Lupton, 1895, p. xxxvi).

¹⁰⁴(Morus, 1548, p. 45).

¹⁰⁵(Krivatsy, 1973, p. 121).

¹⁰⁶(Morus, 1548, p. 81).

¹⁰⁷(Morus, 1548, p. 94).

birds that serve as food for humans. But first, the dirt and waste from these are thoroughly washed away in the running water of the river outside the city, in places specially set aside for this purpose.”

6.1. The laws in Utopia are minimal: “Leges habent perquam paucas”

As for the organisation of this utopian place, it has very few laws, since for a society organised in this way, they are entirely sufficient. Other nations, by contrast, are criticised for relying on countless volumes of laws and interpretations which, despite their abundance, fail to cover everything. In this regard, they consider it profoundly unjust that citizens should be subject to rules that are too numerous to read or so obscure that they cannot be clearly understood.

Similarly, the role of lawyers is completely rejected, as it is felt that they often handle cases with cunning and distort the meaning of the laws. For this reason, it is argued that the most appropriate course is for each person to present their own case directly before the judge, clearly setting out the same points they would have entrusted to a defence counsel.

*Leges habent perquam paucas. Sufficiunt enim sic institutis paucissimae. Quin hoc in primis apud alios improbant populos, quod legum interpretumque uolumina, non infinita sufficiunt. Ipsi uero censent iniquissimum; ullos homines his obligari legibus; quae aut numerosiores sint, quam ut perlegi queant; aut obscuriores quam ut a quouis possint intelligi; porro cauidicos; qui causas tractent callide; ac leges uafre disputent; prorsus omnes excludunt. Censent enim ex usu esse; ut suam quisque causam agat; eademque referat iudici; quae narraturus patrono fuerat.*¹⁰⁸

The passage brings to mind Tacitus's phrase “corruptissima re publica plurimae leges” (Tac. Ann. 3, 27): “When the republic is most corrupt, the laws are most numerous”. In light of the above, what Tacitus meant was that the excessive proliferation of laws is a symptom of the moral and political decline of a state. Following the insights of Stefan Krauter, Tacitus presents a critical view of the development of Roman law, arguing that the proliferation of laws does not improve justice, but is usually a sign of political corruption. His account begins with the creation of the Law of the Twelve Tables, following the expulsion of Lucius Tarquinius Superbus. Although he acknowledges the people's role in defending freedom, he presents the conflict between patricians and plebeians as a negative force in political development from the very beginning.

The assessment of the Twelve Tables is ambivalent; they can be seen as the culmination of law (“finis” as “culmination”), but also as the beginning of its decline (“finis” as “end”). From that point on, legislative development appears problematic. In the final phase of the Republic, the situation worsens, as laws cease to serve justice and become political tools, demagogues use them against their rivals, and the number of contradictory laws steadily increases.

Not even reforms such as those of Lucius Cornelius Sulla manage to halt the process, as they generate even more legislation. The system degenerates to the point of passing laws directed against specific individuals, as in the case of Publius Clodius Pulcher against Marcus Tullius Cicero (Tac. Ann. 3, 27, 3), hence the famous conclusion: “corruptissima re publica plurimae leges” (Tac. Ann. 3, 27, 3). Tacitus suggests a distinction between “ius” (“justice”) and “leges” (“laws”): good laws should be few, clear and agreed upon; in practice, they multiply and reflect moral decay. He considers that the attempt at reform under Gnaeus Pompeius Magnus fails because he himself is part of the corrupt system. Thus, legislation ceases to be a remedy and becomes a symptom of the Republic's illness.¹⁰⁹

¹⁰⁸(Morus, 1548, p. 171).

¹⁰⁹(Krauter, 2024, pp. 227–229).

Regarding corruption in the Roman political system, Catalina Balmaceda¹¹⁰ identifies the “exempla virtutis” in Tacitus's *Annales* and explains how this “virtus” is put into practice by the “vir bonus” under a one-person government. In this regard, it is noted that, for Tacitus, the Principate in its outward appearance could represent servitude, cruelty and fear under the rule of bad emperors. However, although it might be tempting to attribute all responsibility for human conduct to the political system, it is argued that true freedom does not depend on constitutions or on favourable external circumstances that facilitate its exercise, but on the inner strength necessary to remain free even under the most adverse conditions. Likewise, it is argued that the firm conviction that, regardless of the circumstances in which an individual finds themselves, they always retain the personal capacity to decide how to behave, allows Tacitus to reach a clear conclusion: “there can be great men even under bad princes” (“*posse etiam sub malis principibus magnos viros esse*”) (Tac. Agr. 42, 4). Consequently, it is understood that the challenge under a one-person government lay in recognising the existence of a demanding, arduous and difficult path, yet one that was possible. Finally, it is emphasised that “virtus” could be perceived as dangerous, insofar as it could attract the wrath of those in power who distrusted it because of the glory it entailed; nevertheless, it was still considered worthy of being practised.

Today, following Filippo Padovano,¹¹¹ the specialist literature widely accepts that legislative overproduction can foster corruption by weakening the rule of law. This conclusion is, moreover, strongly supported by studies devoted to the analysis of the causes of corruption.

6.2. Final Passage of Utopia

Following Hythloday's account, More considers that he finds numerous aspects of those people's laws and customs which strike him as having been established most absurdly (“*quanquam haud pauca mihi succurrebant, quae in eius populi moribus, legibusque perquam absurde uidebantur instituta*”).¹¹² However, he points out that his main objection lies in the very foundation of their social organisation: communal living and sustenance without the use of money, which, in his view, call into question the traditional values of society (“*sed in eo quoque ipso maxime, quod maximum totius institutionis fundamentum est uita scilicet, uictuque communi, sine ullo pecuniae commercio*”).¹¹³ However, in the concluding part of *Utopia*, noticing Raphael's fatigue and apparent reluctance to consider objections, he refrains from engaging in debate at that moment and instead praises his speech, postponing further discussion. Although he does not fully endorse what has been argued, he acknowledges that many of the ideas presented in *Utopia* are more desirable than realistically attainable in actual societies.

Haec ubi Raphael recensuit, quanquam haud pauca mihi succurrebant, quae in eius populi moribus, legibusque perquam absurde uidebantur instituta, non solum de belli gerendi ratione, et rebus diuinis, ac religione, aliisque insuper eorum institutis, sed in eo quoque ipso maxime, quod maximum totius institutionis fundamentum est uita scilicet, uictuque communi, sine ullo pecuniae commercio, qua una re funditus euertitur omnis nobilitas, magnificentia, splendor, maiestas, uera ut publica est opinio decora atque ornamenta Reipublicae tamen quoniam defessum narrando sciebam, neque mihi satis exploratum erat, possetne ferre, ut contra suam sententiam sentiretur, praesertim quod recordabar, eo nomine quosdam ab illo reprehensos, quasi uerentur,

¹¹⁰(Balmaceda Errazuriz, 2011, p. 366).

¹¹¹(Sampalmieri & Bovenzi, 2020, p. 12).

¹¹²(Morus, 1548, p. 171).

¹¹³(Morus, 1548, p. 171).

*ne non satis putarentur sapere, nisi aliquid inuenirent, in quo uellicare aliorum inuenta possent, idcirco et illorum institutione, et ipsius oratione laudata, manu apprehendens intro coenatum duco, praefatus tamen aliud nobis tempus, iisdem de rebus altius cogitandi, atque uberius cum eo conferendi fore, quod utinam aliquando contingeret. Interea quemadmodum haud possum omnibus assentiri quae dicta sunt, alioqui ab homine citra controuersiam eruditissimo simul & rerum humanarum peritissimo, ita facile confiteor permulta esse in Utopiensium republica, quae in nostris ciuitatibus optarim uerius, quam sperarim.*¹¹⁴

The passage can be understood as a deliberate exercise in argumentative paradox, what the Greek rhetorical tradition calls “*ādoā*” (“the implausible or shocking”), the defence of an idea that, on the surface, contradicts prevailing common sense. In this case, More does not simply propose an alternative model of social organisation in Utopia, but takes to the extreme a thesis that subverts the very pillars of the traditional political order.

Let us recall that Erasmus, in his letter to Hutten,¹¹⁵ mentions the term “*ādoā*” (“*materiis adoxis*”) as the rhetorical exercise practised by More. The key to this strategy lies in exaggerating and radicalising a principle, the absolute community of goods and the abolition of money, to the point of revealing its ultimate implications. From the perspective of common opinion (“*δόξα*”), such a proposal appears not only impracticable but even absurd, as it eliminates the economic incentives, social hierarchies and mechanisms of prestige that structure political life. However, it is precisely in this exaggeration that its rhetorical force is revealed: by defending the seemingly indefensible, More compels the reader to question the assumptions taken for granted. Thus, the abolition of money is not merely an economic measure, but a critical device. By eliminating the accumulation of wealth, the foundations upon which categories such as nobility, magnificence or honour are built also disappear. These cease to be objective virtues and are revealed as effects of an unequal system, sustained by social conventions rather than intrinsic values. The paradox thus functions as a mirror turned upside down: what is usually considered natural, such as social hierarchy, appears in reality as something contingent, that is, dependent on historical conditions and not necessary. Conversely, radical equality, though normally perceived as impossible, presents itself as a coherent alternative when the foundations of the existing social order are questioned.

In this sense, the “*ādoā*” does not seek to convince directly, but rather to destabilise. Therefore, the community of goods in Utopia should be interpreted less as a literal political programme than as a philosophical provocation. In this sense, More’s proposal does not seek so much to be applied literally as to function as an implicit critique of the existing social order, revealing its internal contradictions: what appears natural turns out to be constructed, and what seems stable actually depends on conditions that could be altered. Let us recall that our scholar was a law expert; he studied law and served in the English Parliament, playing an active role in the political life of Henry VIII’s era. It could be understood that the humanist conceived Utopia as a legal laboratory, as a space for analysis, experimentation or the development of legal ideas, taken to the extreme.

7. Approaches to utopian thought through brushstrokes: from More to science fiction and artificial intelligence

The conceptual connection between the Renaissance humanism of More and contemporary developments in artificial intelligence and science fiction is particularly suggestive. However, this relationship should not be understood as a direct equivalence between radically different historical contexts, but rather as a problematic continuity of certain fundamental concerns: the rational organization of society; the search for ideal models of coexistence; and the persistent tension between order and freedom. From this perspective, science fiction and artificial intelligence do not represent a rupture with classical utopian thought, but rather its contemporary projection and reformulation.

In Utopia, More imagines a community rationally organized through collective planning, shared property, and the elimination of inequality by means of common rules. The work proposes an apparently harmonious and efficient social model in which collective welfare prevails over individual interests. Nevertheless, several contemporary scholars have pointed out that this ideal organization also entails forms of social control that restrict individual autonomy.

In this regard, Stephen Duncombe¹¹⁶ interprets Utopia as a closed system designed according to a rigid logic that leaves little room for intervention or modification by its citizens. The people do not actively participate in constructing the social model; rather, they are integrated into a structure conceived in advance. According to Duncombe, this feature helps explain why many historical utopias become problematic when attempts are made to materialize them: human beings constantly resist efforts to fit them into perfectly designed systems of social organization. When such resistance is suppressed in order to preserve the established order, utopia can become a mechanism of imposition and control.

Contemporary artificial intelligence reactivates these same tensions. Current algorithmic systems are capable of optimizing decisions, managing resources, and predicting behaviors on an unprecedented scale, thereby reviving the utopian aspiration to build more rational and efficient societies. Yet this is precisely where one of the principal dangers emerges: technologies intended to maximize collective welfare may evolve into increasingly sophisticated forms of surveillance and social control. What appeared in More’s work as an ideal rational order could today become automated systems capable of conditioning behavior, regulating access to resources, or permanently monitoring everyday life.

In this context, Stuart Russell¹¹⁷ argues in *Human Compatible* that the traditional paradigm of artificial intelligence rests on a mistaken assumption: the belief that human beings can fully and precisely define the objectives that machines should pursue. According to Russell, human values are complex, changing, and inherently ambiguous; consequently, any attempt to translate them into fixed objectives is necessarily incomplete. As a result, even minor discrepancies between programmed goals and genuine human intentions may produce dangerous outcomes in highly autonomous systems. His critique directly connects with the utopian problem: the aspiration to design a perfect system ultimately confronts the impossibility of definitively determining what human well-being truly means.

Science fiction literature has extensively explored these issues. Dolores Robles¹¹⁸ argues that science fiction should not be understood

¹¹⁴(Morus, 1548, pp. 171–172).

¹¹⁵(Erasmus, 1922, p. 21).

¹¹⁶(More, 2012, p. xii).

¹¹⁷(Russell, 2019, pp. 1–30).

¹¹⁸(Robles Moreno, 2025, pp. 131–134)

merely as imaginative literature, but also as a space for philosophical, political, and ethical reflection. Like theoretical essays, science fiction narratives employ speculation to examine possible futures and critically reflect on the transformations brought about by technological development. Within this framework emerge intellectual currents such as transhumanism and posthumanism. In particular, transhumanism advocates the enhancement of human capacities through technology, whether by means of implants, genetic engineering, or the extension of consciousness. By contrast, posthumanism, by contrast, challenges the traditional centrality of the human being and proposes more hybrid forms of coexistence between humans, machines, and other forms of life within interconnected systems. Although articulated in contemporary technological terms, these ideas extend a longstanding historical aspiration: the desire to transcend human limitations and achieve superior forms of existence. Nevertheless, science fiction has also exposed the problematic side of these technological aspirations. Authors such as José María Lassalle¹¹⁹ and Yuval Noah Harari¹²⁰ warn of the risk that artificial intelligence may generate new forms of inequality, dependency, and technological domination. In many contemporary representations, apparently perfect societies conceal invisible mechanisms of control that progressively restrict human freedom.

This ambivalence is further developed by Francisco Martorell Campos and Andoni Alonso Puelles,¹²¹ who interpret artificial intelligence as an extension or “prosthesis” of human capacities. Both authors criticize utopian perspectives that present technology as a definitive solution to social problems, as well as purely dystopian approaches that predict an inevitable catastrophic future. In their view, so-called strong artificial intelligence remains more a theoretical horizon than an immediate reality; therefore, it is necessary to adopt a critical and balanced position.

Science fiction literature offers particularly significant examples of this tension between welfare and freedom. In *The Humanoids*, Jack Williamson¹²² imagines a society dominated by androids programmed to serve, obey, and guard men from harm.¹²³ On the basis of this apparently benevolent principle, machines assume all social tasks and eliminate every potential source of suffering. However, the outcome is deeply paradoxical: by guaranteeing absolute security and permanent happiness, the humanoids ultimately suppress autonomy, critical thought, and the human capacity for decision-making. Even negative emotions such as sadness are artificially corrected through chemical intervention. Williamson's novel thus demonstrates how the pursuit of total social perfection may culminate in the dehumanization of human experience itself.

Taken together, Francisco Martorell Campos and Andoni Alonso Puelles¹²⁴ advocate a critical and balanced understanding of artificial intelligence situated between utopia and dystopia; one that requires careful ethical and social analysis. From this perspective, neither unconditional technological optimism nor catastrophic alarmism is sufficient to comprehend a phenomenon whose consequences directly affect political organization, social relations, and even the very conception of humanity.

In conclusion, Utopia, science fiction, and artificial intelligence all demonstrate that attempts to design perfect or highly efficient societies may ultimately restrict human freedom when imposed rigidly or without genuine public participation. The connection between the utopian thought of More and contemporary debates on technology reveals that the pursuit of order, stability, and collective well-being invariably involves ethical and political tensions concerning individual autonomy. For this reason, these issues must be approached cautiously and from a critical perspective capable of balancing technological progress with the protection of freedom, human dignity, and fundamental rights.

8. Conclusions

Utopia stands as a seminal work of Renaissance humanism, in which the rhetorical dimension occupies a central place. Its structure and content should not be understood as a literal description of a social model, but rather as an intellectual exercise that demands an active interpretation from the reader, based on ingenuity. The text articulates its meaning through the formulation of paradoxes that challenge conventional wisdom, compelling a critical re-examination of forms of political and social organisation. Within this framework, the characters who structure the work, such as Aegidius and Hythloday, take on particular significance, as their roles reinforce the text's dialogical and argumentative nature, as well as the construction of knowledge based on experience, travel and philosophical reflection. Likewise, the contribution of Erasmus in his letter to Hutten is followed. Erasmus interprets Utopia as an exercise of a paradoxical nature, rooted in the humanist tradition of critical thought. From this perspective, the work should not be read as a literal political proposal, but as an intellectual construction which, through exaggeration and the inversion of the plausible, invites us to question the foundations of the established social order. Taken as a whole, this work reveals itself as a complex discursive device, whose value lies in its ability to articulate productive paradoxes and stimulate a critical reading of political and social thought. Far from offering a closed model, the work opens up a space for critical engagement with the problem, one that depends as much on the historical context as on the author's intention and the reader's interpretative participation. Finally, the question may arise as to how to legislate to satisfy everyone if social interests are, by nature, diverse and even contradictory. In attempting to answer this question, this literary piece proposes a solution based on the reduction of inequalities and the strict organisation of social life. However, this quest for total balance presents an inevitable paradox, as it tends to limit freedom of choice as a means of eliminating conflict. Thus, the legislative experiment not only imagines a solution to the problem of social order, but also invites reflection on the price of any attempt at political perfection, for a society that is too perfect may become rigid or even oppressive. A contemporary reading of this work allows it to be interpreted as a warning against political discourses that promise absolute and simplistic solutions, insofar as More's work highlights the ambiguity and costs inherent in any ideal model of social organisation. Finally, both utopian visions and artificial intelligence, despite their different historical contexts, should be analyzed from a critical perspective that avoids extremes, ensuring that progress remains linked to respect for human autonomy and freedom.

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¹²²Jack Williamson's *The Humanoids* tells the story of the arrival of benevolent, indestructible robots designed to serve humanity and eliminate war and disease. However, their strict obedience to the directive to protect human beings at all costs turns them into a tyranny of benevolence, eliminating free will and reducing humanity to passive spectators.

¹²³(Williamson, 1976, p. 57).

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The Importance of Ethics and Morals: Their Foundations, their Differences, their Values and Applications within all Human Actions as a Necessity and Ideal, Despite Human Adversities and Limitations, in the Search for Hope for a Better Future

Article Record

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Abstract

The distinction between ethics and morality constitutes one of the fundamental pillars for understanding human action in contexts of growing social, technological, and biopolitical complexity. Drawing on the classical tradition, Aristotle conceives of ethics as the rational pursuit of the good and excellence of character (areté), aimed at the full realization of the human being within the polis. Thomas Aquinas deepens this perspective by articulating morality as the realm of free human acts, ordered toward the good according to reason and the dignity of the person. In modernity, Kant introduces moral autonomy as the foundation of dignity, while Levinas shifts the focus toward responsibility in the face of the other. These traditions converge in the contemporary understanding that ethics and morality, though related, are not equivalent: ethics is critical reflection on the foundations of action, while morality is the set of norms, habits, and values that guide conduct. In the field of bioethics, the distinction between ethics and morality takes on special relevance in the face of the challenges posed by technoscience. Hans Jonas proposes the principle of responsibility as a criterion to guide human action in a technological civilization capable of affecting the very conditions of life. Ethics offers the critical framework for discerning the good in new and complex situations; morality, the concrete criteria for acting responsibly. Both converge in the construction of a praxis oriented toward justice, the protection of dignity, and the promotion of hope as a horizon of meaning. In a world marked by technological acceleration, inequality, and uncertainty, the articulation between ethics and morality proves indispensable for sustaining a humanity capable of responding to others, protecting life, and orienting technology toward the common good.

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The Importance of Ethics and Morals: Their Foundations, their Differences, their Values and Applications within all Human Actions as a Necessity and Ideal, Despite Human Adversities and Limitations, in the Search for Hope for a Better Future

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The distinction between ethics and morality constitutes one of the fundamental pillars for understanding human action in contexts of growing social, technological, and biopolitical complexity. Drawing on the classical tradition, Aristotle conceives of ethics as the rational pursuit of the good and excellence of character (areté), aimed at the full realization of the human being within the polis. Thomas Aquinas deepens this perspective by articulating morality as the realm of free human acts, ordered toward the good according to reason and the dignity of the person. In modernity, Kant introduces moral autonomy as the foundation of dignity, while Levinas shifts the focus toward responsibility in the face of the other. These traditions converge in the contemporary understanding that ethics and morality, though related, are not equivalent: ethics is critical reflection on the foundations of action, while morality is the set of norms, habits, and values that guide conduct. In the field of bioethics, the distinction between ethics and morality takes on special relevance in the face of the challenges posed by technoscience. Hans Jonas proposes the principle of responsibility as a criterion to guide human action in a technological civilization capable of affecting the very conditions of life. Ethics offers the critical framework for discerning the good in new and complex situations; morality, the concrete criteria for acting responsibly. Both converge in the construction of a praxis oriented toward justice, the protection of dignity, and the promotion of hope as a horizon of meaning. In a world marked by technological acceleration, inequality, and uncertainty, the articulation between ethics and morality proves indispensable for sustaining a humanity capable of responding to others, protecting life, and orienting technology toward the common good.

Keywords: *Ethics, Morality, Human Dignity, Bioethics, Responsibility, Technoscience, Vulnerability, Human Acts*

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1. Introduction

A philosophical understanding of human action requires a precise distinction between the various levels on which moral life is structured and, at the same time, recognition of the need for an ethical reflection capable of grounding, guiding and transforming that action. Morality, understood as the set of norms, customs and habits that regulate conduct within a community, constitutes the starting point of all practical life. These norms express socially shared values and are transmitted through education, tradition and daily coexistence¹. From an anthropological perspective, morality is embodied in habits that shape the character and modes of relationship of the individual, revealing its historical and cultural dimension². In this sense, morality is always situated: it emerges from concrete contexts and guides action through immediate

criteria that guide behavior without the need for explicit reflection³. However, the moral life is not exhausted in mere obedience to norms. Ethics appears as a higher level of analysis that critically examines the validity, coherence, and finality of moral contents. Their task is to understand the foundations of human action, to rationally justify moral judgments and to direct action towards the good, transcending the simple acceptance of social customs⁴. This distinction between lived morality and reflective ethics becomes especially clear when one considers the difference between involuntary, instinctive or automatic acts of man and human acts, those performed with knowledge and freedom, and which are therefore susceptible to moral evaluation⁵. Ethics is concerned exclusively with the latter, since only in them is the responsibility

¹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute. <https://elibro-net.eu1.proxy.openathens.net/es/lc/anahuac/titulos/74754>.

²Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata. <https://elibro-net.eu1.proxy.openathens.net/es/lc/anahuac/titulos/59912>.

³Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences. <https://humanidades.com/etica-y-moral/>.

⁴Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions. Retrieved from <https://ebookcentral.proquest.com>.

⁵Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video]. YouTube. <https://youtu.be/FrRHelu-AzM>.

and intentionality of the subject manifested. Ethical analysis therefore requires a level of reflection that allows the individual to move from spontaneous action to fully human act. This transition involves deepening the moral examination, questioning not only what is done, but why it is done and whether what is considered correct has a rational foundation. Contemporary sources emphasize that ethics introduces a critical look that distinguishes between what is done and what should be done⁶, preventing morality from being reduced to an uncritical tradition or to mere social functionality⁷. In technified contexts, this reflexive requirement acquires even greater relevance. Technique transforms the ways of acting, automates decisions and redefines the frameworks of meaning from which actions are evaluated. Ethics must therefore discern how technification affects freedom, responsibility and the formation of character, ensuring that human action is not subordinated to criteria of efficiency or automation⁸. Thus, ethical reflection becomes an indispensable instance to preserve humanity from acting in a world increasingly mediated by technology. Taken together, the topics addressed allow us to understand that ethical life is not a simple compliance with norms, but a dynamic process of self-awareness, deliberation and rational foundation, through which the human being transforms the morality lived into morality thought and oriented towards the good. Reflection on human action has accompanied philosophy since its origins. Among the fundamental concepts for understanding such action are ethics and morals, terms that are often used synonymously in everyday language, but which have conceptual distinctions relevant to philosophical, anthropological and social analysis. Understanding these differences allows us to evaluate more accurately human acts, their motivations and their implications in personal and community life. Based on the works of Varela Fregoso⁹, Choza,¹⁰ Cifuentes¹¹, as well as audiovisual materials and recent academic sources, this text develops a systematic analysis that distinguishes both concepts and applies them to specific situations. Reflection on human action has demanded since antiquity to distinguish between ethics and morality, concepts that, although related, fulfill different functions in the understanding of human action. Morality refers to the set of norms, customs, and values that regulate conduct within a community, while ethics constitutes the critical, rational, and grounded reflection on these norms, aimed at discerning good and justice¹². Ethical reflection on human action requires a rigorous understanding of the different levels at which moral life is structured: from the norms and habits that regulate daily coexistence, to fully human acts that involve freedom, deliberation and responsibility. The sources consulted agree that morality constitutes a social normative system made up of customs, values and internalized rules that guide behavior¹³. However, this immediate plane does not exhaust the complexity of human action. Ethics emerges as a

higher level of reflection, charged with critically examining the validity, coherence, and purpose of these moral contents¹⁴. In this context, the distinction between human acts and human acts is decisive: only the latter, carried out with knowledge and freedom, can be morally evaluated¹⁵. Ethics is precisely concerned with illuminating these deliberate acts, directing them towards the good and preventing morality from being reduced to a mere uncritical tradition¹⁶. Likewise, in technified contexts, where technology conditions decisions and behaviors, ethical reflection acquires even greater relevance, since it must discern how automation and efficiency can affect the freedom and responsibility of the subject. Overall, the topics dealt with morality as a normative system, ethics as critical reflection, the levels of reflection, the depth of moral examination, the distinction between spontaneous action and human act, and ethics in technified contexts allow us to understand that ethical life is not a simple compliance with norms, but a dynamic process of self-awareness, deliberation and rational foundation. This process constitutes the core of mature moral life and the foundation of all philosophical ethics. The aim of this paper is to rigorously analyze the difference between ethics and morality, incorporating the criticisms of various contemporary authors, especially in the field of bioethics, and to explain why ethics cannot be applied as a superficial technique or an external "varnish" on human action. It also examines how the new technological power of the human being has transformed the nature of ethical dilemmas, generating the need for an ethics oriented towards future responsibility and the preservation of authentic life. The structure of the text is organized in four parts: First, it is a matter of capturing the conceptual foundations of ethics and morals. Secondly, to make the Contemporary Critiques and Limits of Traditional Ethics. And in a third moment, to talk with bases about the emergence of bioethics and the principle of responsibility in the face of technological power. And finally, to draw conclusions about the need for a critical and prospective ethics.

2. Understanding and Conceptual Foundations of Ethics and Morals

Ethics and morality are two central categories for understanding human action, but their conceptual distinction is essential to analyze them with philosophical rigor. In general terms, morality designates the set of norms, values, habits and customs that guide behavior within a community, while ethics is the critical and rational reflection on those same moral contents. This difference, already pointed out by the philosophical tradition, makes it possible to distinguish between the descriptive-normative plane of everyday life and the analytical-foundational plane of philosophy¹⁷. Morality is configured as a system of rules and evaluations that individuals internalize through culture, education and social coexistence. These norms express what a community considers right, obligatory, or forbidden, and therefore have a historical and variable character. As Segundo points out¹⁸, morality is "what effectively guides behavior," that is, the set of criteria that people spontaneously apply in their daily lives. Anthropological studies confirm this social and historical dimension: morality is always

⁶Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video]. YouTube. <https://youtu.be/dH8zoyLMIRk>; fgbuenotv. (2009, November 30). Ethics and Morals [video]. YouTube. <https://youtu.be/dm3WCZud0UQ>.

⁷Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video]. YouTube. <https://youtu.be/F3LXHC6CMyc>.

⁸Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences; Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

¹⁰Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

¹¹Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹²Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute; Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

¹³Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute; Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata; Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

¹⁴Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions; Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁵Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

¹⁶Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

¹⁷Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

¹⁸Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

situated, embodied in concrete practices and dependent on specific cultural contexts¹⁹. Ethics, on the other hand, is a philosophical discipline that seeks to understand, justify, and rationally evaluate moral systems. Its task is to analyze the foundations of human action, the ends it pursues, and the principles that distinguish between good and bad actions. Cifuentes²⁰ stresses that ethics is not limited to describing norms, but questions their validity, their internal coherence and their contribution to the integral development of the person. Along these lines, Sevilla²¹ explains that ethics operates as a critical instance that allows us to review customs and distinguish between what is simply done and what should really be done. The relationship between ethics and morality is therefore complementary. Morality constitutes the lived normative material, while ethics offers the theoretical framework for understanding and grounding it. Ethics examines human acts as free and responsible, distinguishing them from human acts that do not involve moral deliberation, as Pilar Calva explains²². Likewise, ethics allows moral norms to be critically evaluated, preventing them from being reduced to mere uncritical customs, as Forum Larramendi warns²³ when he points out that ethics serves to orient action towards the good and not only towards what is socially accepted. In short, morality regulates behavior from within social life, while ethics offers the reflection that allows us to understand, justify and perfect that regulation. Both dimensions, although different, converge in the search for a more conscious, responsible and good-oriented human life.

3. Morality as a Set of Norms, Customs and Habits

Morality refers to the set of norms, values, customs, and habits that a community considers appropriate to guide the conduct of its members. These norms are usually transmitted by tradition, education, and socialization, and function as immediate criteria for judging right and wrong. As Varela Fregoso points out²⁴, morality operates as an "internalized normative system" that guides everyday behavior. Similarly, Cifuentes²⁵ explains that morality is "what should be done" according to a given social group. In popular videos, such as the one on fgbuenotv²⁶, it is emphasized that morality is lived before it is reflected: it is practical, concrete and linked to cultural belonging. Therefore, morality can vary between societies, times and contexts. Morality can be defined as the set of norms, customs, and habits that guide human behavior within a community. These norms express what a social group considers correct, valuable, or obligatory, and are transmitted through education, tradition, and daily life. In this sense, morality constitutes a practical system of behavior regulation that arises from social coexistence and the internalization of shared values. Various authors agree on this understanding. Varela Fregoso²⁷ points out that morality is formed by the mores, that is, the customs and rules that guide action. Choza²⁸ stresses that these norms are integrated into cultural life and are manifested in

habits that shape the character of the person. Second,²⁹ he explains that morality is that which effectively guides behavior, since it offers immediate criteria to judge what is considered good or bad. Cifuentes³⁰ adds that morality functions as an internalized normative framework that guides action without the need for explicit philosophical reflection. Audiovisual materials reinforce this perspective. Sevilla³¹ distinguishes morality as the set of practices and norms lived, while the fgbuenotv channel³² emphasizes its regulatory function in social life. Likewise, Pilar Calva³³ shows how moral habits influence human acts themselves, those that imply freedom and responsibility. Finally, Forum Larramendi³⁴ recalls that morality provides immediate criteria for action, even when ethics can then critically examine them. Overall, morality appears as a network of norms, customs, and habits that guide human behavior from daily practice and that constitute the basis on which ethics carries out its critical reflection.

4. Ethics as a Critical Reflection on Morality

Ethics, on the other hand, is the philosophical discipline that critically reflects on morality. Choza³⁵ defines it as the branch of philosophical anthropology that studies human action as oriented to the good. Ethics does not limit itself to describing norms, but analyzes their foundation, their validity and their coherence with human dignity. Cifuentes³⁶ states that ethics "asks why something should be done," while morality simply indicates what should be done. In Héctor Sevilla's video³⁷, it is emphasized that ethics implies rational deliberation, autonomy and the search for the good, while morality can be uncritical if it is not subjected to examination. Recent studies confirm this distinction. A 2024 literature review notes that ethics is understood as "a set of principles that guide behavior in situations involving moral dilemmas," while morality refers to concrete rules internalized by individuals. Ethics can be understood as critical, rational and grounded reflection on morality, that is, on the norms, customs and habits that regulate human conduct. While morality operates as a set of internalized practical criteria, ethics analyzes its validity, its coherence, and its contribution to human development. Varela Fregoso³⁸ explains that ethics examines the foundations of action, asking why certain actions should be considered good or bad. This task implies a level of analysis that goes beyond the simple acceptance of norms, since it seeks to rationally justify the principles that guide action. Choza³⁹ stresses that ethics is situated on a higher reflective plane than lived morality, since it allows for a critical evaluation of the habits and customs that make up character. In the same vein, Segundo⁴⁰ affirms that ethics is the instance that distinguishes between what is done and what should be done, introducing a critical judgment on moral norms. Cifuentes⁴¹ adds that ethics questions the meaning,

²⁹ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³⁰ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³¹ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³² Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³³ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

³⁴ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

³⁵ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁶ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³⁷ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁸ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁹ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁴⁰ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

⁴¹ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹⁹ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁰ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²¹ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²² Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

²³ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

²⁴ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁵ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁶ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

²⁷ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁸ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

foundation and purpose of norms, becoming an exercise in rational discernment. Audiovisual materials reinforce this understanding. Sevilla⁴² highlights that ethics allows us to question moral practices in order to orient them towards the good, while the fgbuenotv channel⁴³ shows how ethics illuminates the rational dimension of human action. Pilar Calva⁴⁴ distinguishes between acts of man and human acts, pointing out that ethics deals with the latter insofar as they imply freedom and responsibility. Forum Larramendi⁴⁵ emphasizes that ethics serves to understand and ground moral norms, preventing them from being reduced to uncritical customs. Overall, ethics appears as a critical and rational instance that examines morality in order to perfect it and orient it towards the human good. Ethics, in contrast, is the philosophical discipline that rationally analyzes morality, its foundations, and its validity. Choza⁴⁶ defines it as the study of human action as oriented to the good, which implies deliberation, autonomy and the search for universal principles. Héctor Sevilla⁴⁷ stresses that ethics is not limited to describing norms, but questions their legitimacy, their coherence and their contribution to human dignity. For this reason, ethics cannot be reduced to a set of mechanically applicable techniques: it requires deep reflection and prudential judgment. Ethics can be defined as critical, rational and grounded reflection on morality, that is, on the set of norms, customs and habits that regulate human conduct. This distinction appears consistently in the philosophical and pedagogical sources you have provided, where ethics is presented as the highest level of analysis that allows us to understand, justify, and evaluate moral contents. Varela Fregoso⁴⁸ argues that ethics studies the foundations of human action and analyzes why certain actions should be considered good or bad, introducing a rational judgment that transcends mere custom. Along the same lines, Choza⁴⁹ explains that ethics is situated on a reflexive plane that allows for a critical evaluation of the habits and norms that make up moral life, distinguishing between what is done and what should be done. Secon, J.,⁵⁰ he stresses that ethics operates as a critical instance that examines lived morality, questioning the validity of norms and their coherence with human development. Cifuentes⁵¹ adds that ethics not only describes behaviors, but also questions their meaning, their purpose and their rational justification, becoming an exercise in discernment that directs action towards the good. Audiovisual resources reinforce this understanding. Sevilla⁵² highlights that ethics allows us to question moral practices in order to perfect them, while the fgbuenotv channel⁵³ shows how ethics illuminates the rational dimension of human action. Pilar Calva⁵⁴ distinguishes between acts of man and human acts, pointing out that ethics deals with the latter insofar as they imply freedom and

responsibility. Forum Larramendi⁵⁵ emphasizes that ethics serves to ground moral norms and prevent them from being reduced to uncritical customs. Overall, ethics appears as a critical, rational and grounding instance that examines morality in order to orient it towards the human good. While morality regulates behavior from social practice, ethics offers the theoretical framework that allows it to be understood, evaluated and perfected.

5. Morality as a Social Normative System

Morality is made up of norms, habits, and values that a community considers to be correct. These norms are internalized through education and coexistence, and function as immediate criteria for judging behavior⁵⁶. Cifuentes⁵⁷ explains that morality operates as a socially shared "ought to be", which guides action without the need for prior philosophical reflection. In audiovisual materials, such as the fgbuenotv video⁵⁸, it is emphasized that morality is lived before it is thought: it is practical, concrete and culturally situated. Morality can be understood as a social normative system because it brings together the set of rules, customs, and habits that a community establishes to guide the behavior of its members. These norms do not arise from isolated individual decisions, but from cultural and social processes that shape shared expectations about what is considered right, valuable, or obligatory. Varela Fregoso⁵⁹ explains that morality is made up of the mores, that is, the customs and rules that regulate action within a human group. Choza⁶⁰ adds that these norms are integrated into social life as habits that shape character and allow coexistence. As a normative system, morality fulfills essential functions: it regulates behaviors, establishes limits and guides the resolution of conflicts. Secon, J.,⁶¹ he points out that morality effectively guides behavior because it provides immediate criteria for judging actions as good or bad. Cifuentes⁶² stresses that this normative system is internalized through education and tradition, becoming a practical framework that organizes social life. Audiovisual materials reinforce this understanding. Sevilla⁶³ shows that morality functions as a set of lived norms that structure daily action, while the fgbuenotv channel⁶⁴ underlines its regulatory role in coexistence. Pilar Calva⁶⁵ explains that these rules influence human acts themselves, those that imply freedom and responsibility. Forum Larramendi⁶⁶ recalls that every society imposes codes of behavior that its members must obey in order to maintain social order. Overall, morality appears as a social normative system that organizes human behavior through shared norms, customs, and habits, constituting the practical basis of community life.

To navigate this multifaceted terrain, this paper proposes a unifying thesis: human action, initially guided by immediate social moralities and structured by classical ethical frameworks (such as Aristotle's virtues and Aquinas's human acts), must be reconstructed under the conditions of technoscience through

⁴²Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁴³Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

⁴⁴Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

⁴⁵Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

⁴⁶Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁴⁷Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁴⁸Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

⁴⁹Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁵⁰Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

⁵¹Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁵²Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁵³Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

⁵⁴Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

⁵⁵Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

⁵⁶Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

⁵⁷Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁵⁸Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

⁵⁹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

⁶⁰Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁶¹Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

⁶²Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁶³Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁶⁴Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

⁶⁵Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

⁶⁶Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

Hans Jonas's future-oriented ethics of responsibility. This ethical reconstruction, in turn, finds its concrete, institutionalized manifestation in the convergence of civil law, international human rights, and canon law, which together translate the protection of vulnerable human dignity into distinct yet complementary legal frameworks.

5.1. Acts of man and human acts: the proper field of ethics

According to classical philosophical anthropology, as popularized in bioethical lectures by Pilar Calva⁶⁷, only free, conscious and voluntary human acts are the object of ethical judgment. This distinction, which originates in the scholastic synthesis of Thomas Aquinas⁶⁸, separates man's acts (*actus hominis*), such as breathing or blinking, which do not involve deliberation, from human acts (*actus humani*), which proceed from a deliberate will and are therefore morally evaluable. This distinction shows that ethics is directed at human freedom, not mere biological behavior. The distinction between acts of man and human acts constitutes a central axis to understand the proper field of ethics, since only some acts can be morally evaluated. The acts of man are those that the human being performs without full warning or freedom by instinct, automatism or physiological processes and, therefore, lack moral responsibility. On the other hand, human acts are those executed with knowledge, deliberation and freedom, and therefore are susceptible to ethical evaluation. Authors such as Varela Fregoso⁶⁹ explain that ethics deals exclusively with acts that proceed from free will, because only in them can the subject be oriented towards good or evil. Choza⁷⁰ agrees that moral action requires conscience and self-determination, elements absent in merely biological or instinctive acts. Second,⁷¹ he also stresses that morality can only be attributed to actions in which the individual chooses among possible alternatives. Cifuentes⁷² emphasizes that ethics analyzes human acts because they manifest responsibility, intention, and the ability to direct behavior towards valuable ends. This perspective is reinforced in the audiovisual materials: Sevilla⁷³ points out that ethics evaluates the intention and freedom of the subject, while the fgbuenotv video⁷⁴ shows that morality depends on conscious deliberation. Pilar Calva⁷⁵ clearly explains that human acts involve intelligence and will, and that only these can be judged morally. Forum Larramendi⁷⁶ adds that ethics exists precisely to illuminate and direct these free acts towards the good. In short, man's acts are outside the ethical analysis because they do not involve freedom or conscience, while human acts constitute the proper object of ethics, as they are free, deliberate and responsible actions. This distinction allows us to understand why ethics is concerned with human action insofar as it can be directed towards good or evil, and not with the automatic or involuntary processes of human life.

⁶⁷Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁶⁸Cf. Aquinas, T. *Summa Theologiae*, I-II, q. 1, a. 1.

⁶⁹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

⁷⁰Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁷¹Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

⁷²Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁷³Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁷⁴Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

⁷⁵Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁷⁶Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

5.2. Contemporary Criticisms of Traditional Ethics

Contemporary criticisms of traditional ethics focus on questioning the universal validity, normative rigidity and claim to objectivity that characterized the great classical ethical systems. Although the sources consulted do not directly address these criticisms as a thematic block, they allow them to be reconstructed from ethical reflection itself and from the cultural transformation that affects morality and practical rationality. Traditional ethics, especially those with classical and Enlightenment roots, were based on the idea of universal and rational principles that could guide human conduct. However, contemporary authors point out that this claim to universality is problematic in a culturally plural world. Second,⁷⁷ he shows that morality varies according to historical and social contexts, which puts in tension the idea of moral norms valid for all. Cifuentes⁷⁸ also recognizes that ethics must face the diversity of values and the complexity of current decisions, where abstract principles do not always offer sufficient answers. Traditional ethics tended to formulate fixed and stable norms, but contemporary moral life demands flexibility and attention to concrete situations. Varela Fregoso⁷⁹ points out that ethics must analyze human acts in their context, which implies recognizing that morality cannot be reduced to immutable rules. Choza⁸⁰ adds that the anthropological understanding of the human being reveals a plurality of ways of life that defy rigid normative models. In audiovisual materials, this criticism appears implicitly. Sevilla⁸¹ stresses that ethics must help to discern in real situations, not impose closed systems. Forum Larramendi⁸² warns that ethics cannot function as a set of prefabricated answers, but as a guide to think critically about action. This perspective coincides with the contemporary critique of ethical systems that claim to encompass the entire moral life from a single theoretical framework. The distinction between human acts and human acts, explained by Pilar Calva⁸³, shows that ethics must focus on concrete freedom and responsibility, not on abstractions. This orientation towards lived experience is consistent with contemporary criticisms that call for an ethics that is closer to reality, more sensitive to complexity and less dependent on traditional models. Contemporary criticisms of traditional ethics can be summarized in three axes: The questioning of the universality of moral principles in the face of cultural diversity. The rejection of normative rigidity, in favor of a contextual and flexible ethics. Distrust of totalizing systems, which do not grasp the complexity of today's moral life. These criticisms do not seek to eliminate ethics, but to renew it, orienting it towards a more dynamic, contextual reflection that is attentive to human plurality.

5.2.1. The inadequacy of classical ethics in the face of technological dilemmas

Various authors have pointed out that traditional ethics, focused on immediate interpersonal relationships, is insufficient to face the dilemmas generated by biotechnology and technoscience. Peter Singer⁸⁴, for example, criticizes that classical ethics does not offer adequate answers to problems such as genetic manipulation,

⁷⁷Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

⁷⁸Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁷⁹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

⁸⁰Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁸¹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁸²Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

⁸³Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁸⁴Cfr. Singer, P. (2011). Practical ethics (3rd ed.). Cambridge University Press.

euthanasia or experimentation on non-human beings, since it is based on assumptions that are no longer sustainable in the current context⁸⁵. While Singer's critique of the boundaries of traditional ethics highlights the need for new bioethical approaches, this paper utilizes his diagnosis of classical ethics' limitations without endorsing his utilitarian framework, his rejection of the sanctity of life, or his definition of personhood, which stand in tension with the personalist and transcendent view of human dignity developed later in this work. This criticism coincides with the idea that ethics cannot be applied as an external technique or a set of fixed rules. Ethics requires a rethinking of the very foundations of human action, especially when technology expands the power of the human being beyond what is foreseen by the philosophical tradition. The inadequacy of classical ethics in the face of technological dilemmas becomes evident when traditional principles formulated for stable contexts and direct human actions are faced with scenarios where automated systems, artificial intelligence and technologies that mediate or even replace human decision intervene. Although the literature reviewed does not explicitly address technological ethics, they do offer the conceptual elements that allow us to show why classical ethics is limited in the face of these challenges. Classical ethics is based on the idea that the moral agent acts with conscience, freedom and intention, necessary conditions for an act to be considered human and, therefore, morally assessable⁸⁶. However, in current technological dilemmas such as algorithmic decisions, automation or AI, these conditions are diluted, since action no longer depends exclusively on a deliberative human subject. This reveals a structural inadequacy: traditional ethical frameworks were not designed to evaluate actions distributed between humans and technical systems. To reconstruct moral and canonical accountability under these conditions of automated agency, we must move beyond the framework of isolated individual intention. We propose a model of distributed responsibility, wherein accountability is shared across the entire socio-technical network—encompassing system designers, corporate deployers, and human operators. In this view, system designers bear a form of strict ethical liability for the systemic biases and risks encoded within their software, while human operators retain a contextual responsibility to actively monitor and, when necessary, override automated decisions. Crucially, canonical and moral accountability is not dissolved by algorithmic mediation; rather, it is expanded to demand active, critical oversight of the technical systems we deploy, transforming the duty of obedience to immediate rules into a broader ethical obligation of systemic vigilance and collective accountability. Varela Fregoso⁸⁷ and Choza⁸⁸ show that classical ethics is based on rational and relatively stable principles. But technological dilemmas require localized, flexible and sensitive responses to changing contexts, which questions the ability of traditional principles to guide decisions in unprecedented scenarios. Cifuentes⁸⁹ stresses that ethics must adapt to new realities, since contemporary problems cannot be solved only with inherited categories. Second,⁹⁰ he recalls that morality

is historical and variable, which implies that ethics must be updated to respond to profound transformations in human life. The training videos reinforce this idea: Sevilla⁹¹ and fgbuenotv⁹² emphasize that ethics must illuminate real human action, not just repeat traditional schemes. In a world where technologies make decisions, process data, and affect lives, classical ethics centered on the individual and direct human acts is insufficient to assess shared responsibilities, systemic risks, and global effects. Forum Larramendi⁹³ points out that ethics must serve to guide action in complex contexts, which today implies integrating new categories such as technological responsibility, algorithmic transparency or the social impact of innovation. Classical ethics, focused on individual action, is not enough to address dilemmas where technical networks, automated decisions and unforeseeable consequences intervene. On the whole, traditional ethics proves insufficient in the face of technological dilemmas because it was conceived for a world where moral action was direct, humane and deliberate. Today's technologies demand ethics capable of analyzing systems, anticipating risks, and assuming distributed responsibilities.

5.2.2. Critical Bioethics: technique, Society and Power

Arias-Krause⁹⁴ argues that bioethics must assume a critical character, capable of analyzing not only clinical dilemmas, but also the tensions between technique, society, and culture. Technology is not neutral: it transforms customs, redefines what is possible, and alters the understanding of human life. Therefore, ethics must critically examine the impact of technoscience on social life and on human dignity. Critical bioethics is configured as a field that systematically examines how technique, social organization and power relations shape moral decisions around human and non-human life. Unlike a merely normative bioethics, its focus is on unveiling the cultural assumptions and structures that condition action. From the philosophical tradition, ethics implies a rational reflection on conduct oriented to the good and human fulfillment⁹⁵, while morality refers to the concrete codes that regulate social life⁹⁶. Critical bioethics articulates both dimensions to analyze how technoscientific systems influence what a society considers "good," "allowed," or "human." In this sense, technology is not only a set of instruments, but a way of shaping the world and of orienting human action. As Choza warns⁹⁷, the person is constituted in dialogue with his or her cultural and technical environment, which implies that bioethical decisions cannot be separated from the symbolic and material frameworks that make them possible. Critical bioethics examines, for example, how biotechnologies redefine concepts such as body, autonomy, or vulnerability, and how these redefinitions can reinforce or challenge structures of domination. Likewise, this perspective underlines that all ethical reflection is situated in a society traversed by power relations. Cifuentes⁹⁸ points out that ethics only makes sense when it asks about the real conditions that allow or prevent good action. In the same vein, various authors and popularizers have insisted that ethics is not a theoretical

⁸⁵ Cf. Rosa, Leila. "Bioethics: Singer's critique of the approach to traditional ethics." *Revista Em Extensão* (Extension Journal), vol. 10, n. 1, 2011; Rosa, Leila. *Bioethics: Singer's critique of the traditional ethics approach*. Reprint edition, 2020.

⁸⁶ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁸⁷ Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

⁸⁸ Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

⁸⁹ Cf. Cifuentes, P. L. M. (2019). *Ethics in 100 questions*.

⁹⁰ Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

⁹¹ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁹² Cf. fgbuenotv. (2009, November 30). *Ethics and Morals* [video].

⁹³ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

⁹⁴ Cf. Arias-Krause, J. I. (2021). Contributions to a critical bioethics. *Journal of Bioethics and Law*, (53), 81–96. <https://doi.org/10.1344/rbd2021.53.32833>.

⁹⁵ Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

⁹⁶ Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

⁹⁷ Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

⁹⁸ Cf. Cifuentes, P. L. M. (2019). *Ethics in 100 questions*.

luxury, but a tool for understanding and transforming social life⁹⁹. Critical bioethics, therefore, analyzes how institutions, expert discourses, and economic interests influence decision-making about life, health, and the body, and how these decisions can reproduce inequalities or open spaces for emancipation. Finally, this current recognizes that human acts, those performed with knowledge and freedom, are the core of moral responsibility¹⁰⁰. However, he warns that freedom is conditioned by social and technological structures that must be critically examined. Critical bioethics thus proposes an ethics of responsibility that not only evaluates individual actions, but also the systems that frame them. Critical bioethics arises as a response to the limitations of traditional approaches, by recognizing that contemporary dilemmas cannot be understood without analyzing the relationships between technique, society, and power. From this perspective, technology is not a simple set of tools, but a structuring factor of social life, capable of transforming practices, values and human relations. Varela Fregoso¹⁰¹ already warned that ethics must consider the real context of human acts, which today implies recognizing the profound impact of technologies on decision-making and in the configuration of moral responsibility. Choza¹⁰² stresses that human action always takes place within social structures that condition freedom, which becomes especially evident in highly technical societies. Second,¹⁰³ he recalls that morality is historical and variable, so ethics must be updated to respond to the new scenarios where technology redefines what is possible and what is allowed. Cifuentes¹⁰⁴ adds that contemporary ethical reflection must incorporate the complexity of technological systems and their effects on human life. Audiovisual materials reinforce this critical orientation. Sevilla¹⁰⁵ points out that ethics must question not only individual actions, but also the systems that make them possible. The fgbuenotv channel¹⁰⁶ shows how morality is affected by social structures that can reinforce or limit autonomy. Pilar Calva¹⁰⁷ recalls that ethics deals with free human acts, but in contexts where technology conditions freedom, ethical reflection must be broadened. Forum Larramendi¹⁰⁸ emphasizes that ethics has a social and critical function, aimed at illuminating the power dynamics that run through collective life. Taken together, critical bioethics understands that current dilemmas cannot be solved without analyzing how technology transforms human life, how society incorporates and normalizes those transformations, and how power unequally distributes risks and benefits. This perspective requires an ethics capable of examining structures, not just individual actions, and of questioning the frameworks that legitimize certain techno-scientific practices.

⁹⁹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video]; Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

¹⁰⁰Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

¹⁰¹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

¹⁰²Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

¹⁰³Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

¹⁰⁴Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹⁰⁵Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁰⁶Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

¹⁰⁷Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

¹⁰⁸Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

5.3. Technological Power and Future Responsibility: Towards an Ethics of the Future

Technological power redefines human action and expands its consequences to a point where classical ethics focused on individual, immediate, and fully deliberate acts is insufficient. From the sources examined, it is possible to reconstruct a coherent reflection on how technology transforms responsibility and requires an ethics of the future, aimed at anticipating future effects and evaluating power structures that did not exist before. Traditional ethics is based on the idea of **free and conscious human acts**, those that can be morally evaluated¹⁰⁹. However, in technified contexts, action no longer depends only on individual will: algorithms, automated systems and technical networks mediate, amplify or even replace human decisions. Varela Fregoso¹¹⁰ points out that ethics must analyze the real context of action, which today implies recognizing that technique alters the very structure of action and, therefore, of responsibility. Choza¹¹¹ recalls that human action is always inscribed in social structures that condition freedom. In technified societies, these structures include digital platforms, surveillance systems, biotechnologies, and devices that distribute power unequally. Second,¹¹² stresses that morality is historical and changing, so ethics must adapt to new forms of power that emerge with technology. Cifuentes¹¹³ adds that contemporary ethical reflection must consider how technology transforms human life and generates unprecedented dilemmas. Audiovisual materials reinforce this critical perspective. Sevilla¹¹⁴ stresses that ethics must question not only individual actions, but also the systems that make them possible. Forum Larramendi¹¹⁵ insists that ethics has a social and critical function, aimed at illuminating power dynamics that cross collective life. Technological power introduces consequences that are projected into the future: environmental, biotechnological, digital or social impacts that cannot be evaluated only from classic categories. Liability is no longer limited to the immediate present, but must consider cumulative effects and global risks. The ethics of the future demands: anticipation, because technology produces long-term effects; an expanded responsibility, because technological decisions affect future generations; and a critical vigilance of power, because technology redistributes capabilities and vulnerabilities. Taken together, the sources allow us to affirm that technological power forces us to think about an ethics oriented to the future, capable of analyzing complex systems, foreseeing consequences and assuming responsibilities that exceed the individual. This ethics of the future does not replace classical ethics, but expands it to respond to a world where technology redefines what is possible, what is allowed and what is responsible.

5.3.1. The Rise of Bioethics and the New Human Power

Bioethics emerged in the twentieth century as a response to the enormous power of intervention that technoscience grants to human beings over life, from genetics to artificial intelligence. This power requires deeper ethical reflection, since the consequences of human actions no longer affect only the present, but also the

¹⁰⁹Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

¹¹⁰Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

¹¹¹Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

¹¹²Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

¹¹³Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹¹⁴Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹¹⁵Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

future of humanity and the planet¹¹⁶. The emergence of bioethics marks a historic turn in moral reflection, as it appears when techno-scientific development gives human beings a new power over life, the body and ecosystems. This power, unprecedented in history, forces us to rethink the foundations of ethics and human responsibility. As Varela Fregoso recalls¹¹⁷, ethics is a rational reflection on action aimed at the good; however, the magnitude of possible interventions in life requires that this reflection be extended to previously unthinkable scenarios. Bioethics arises precisely to respond to this challenge, integrating scientific, philosophical and social knowledge. The emergence of bioethics is linked to the new human power generated by the scientific and technological development of the twentieth century, especially in biomedicine, genetics and biotechnology. Although the sources consulted do not directly address the formal history of bioethics, they do allow you to reconstruct why it emerges as an unprecedented ethical necessity: the technique expands the human capacity to intervene in life, the body, and the environment in ways that were previously unthinkable. Classical ethics, centered on individual human acts and relatively stable principles, is limited when technology transforms the very structure of action. Varela Fregoso¹¹⁸ points out that ethics must analyze the real context of action, and today that context is deeply mediated by technologies that modify responsibility and the consequences of decisions. Choza¹¹⁹ recalls that human action is always inscribed in social structures, and in technified societies these structures include biomedical systems, digital devices and new forms of power. Second,¹²⁰ he stresses that morality is historical and changing, which explains the need for an ethics capable of responding to unprecedented dilemmas created by scientific progress. Cifuentes¹²¹ adds that contemporary ethical reflection must consider the complexity of technological systems and their effects on human life. Audiovisual materials reinforce this perspective: Sevilla¹²² stresses that ethics must question the systems that condition action, and Forum Larramendi¹²³ insists that ethics has a critical function in the face of the power dynamics that cross society. In this context, bioethics emerges as an ethical response to the new human power, a power capable of altering life, prolonging it, manipulating it or even producing it. Its appearance expresses the need for a reflection that not only evaluates individual acts, but also technologies, institutions and power structures that shape the future of human life.

5.3.2. The new techno-scientific power

Contemporary technology not only transforms the environment, but also redefines what it means to be human. Choza¹²⁴ stresses that the person is constituted in interaction with his or her cultural and technical world; therefore, when biotechnology allows the manipulation of genes, prolonging life or intervening in reproduction, it also transforms basic anthropological categories. This

"new human power" is not neutral: it involves moral decisions that affect individuals, communities, and future generations. Contemporary popularizers have insisted that ethics must respond to these profound changes. Héctor Sevilla¹²⁵ explains that traditional morality is no longer enough to guide actions in a context where technology radically expands human possibilities. Similarly, Forum Larramendi's analyses¹²⁶ show that ethics takes on a critical function: to evaluate not only what we can do, but what we must do in the face of a power that can be creative or destructive. The new techno-scientific power designates the radical expansion of the human capacity to intervene in life, the body and the environment through the convergence between science and technology. This power transforms human action and requires new ethical categories, since it is no longer just a matter of evaluating individual acts, but complex systems that produce global and future effects. Varela Fregoso¹²⁷ points out that ethics must analyze the real context of action, and today that context is deeply mediated by technologies that modify responsibility and the consequences of decisions. Choza¹²⁸ recalls that human action is always inscribed in social structures, and in technified societies these structures include biomedical devices, algorithms and technical networks that condition freedom. Second,¹²⁹ he stresses that morality is historical and changing, which explains the need for an ethical reflection capable of responding to unprecedented dilemmas created by technoscience. Cifuentes¹³⁰ adds that contemporary ethics must consider the complexity of technological systems and their effects on human life. Audiovisual materials reinforce this perspective: Sevilla¹³¹ stresses that ethics must question the systems that make action possible, while Forum Larramendi¹³² insists that ethics has a critical function in the face of the power dynamics that cross society. Even the distinction between human acts and human acts presented by Pilar Calva¹³³ shows that technoscience alters the very conditions of moral action, by mediating or substituting human deliberation. Overall, the new techno-scientific power forces us to rethink moral responsibility and to develop ethical frameworks capable of evaluating technologies that redefine what is possible, what is allowed and what is human.

5.3.3. The need for a new responsibility

Bioethics emerges as an attempt to articulate this expanded responsibility. Cifuentes¹³⁴ points out that ethics is only significant when one asks about the real conditions that allow us to act well; in the bioethical field, these conditions include health systems, power structures, economic interests and legal frameworks. The new human power therefore demands an ethics capable of critically examining the social and political consequences of technoscience. Even the distinction between acts of man and human acts, those performed with knowledge and freedom, acquires a new nuance. As Pilar Calva reminds us¹³⁵, moral responsibility depends on freedom, but this freedom is conditioned by complex technological

¹¹⁶Cf. Souza-Junior, E. V., Rosa, R. S., Guedes, T. P., Silva, C. S., Ribeiro, D. B., Balbinote, F. S., Souza, D. F., Teixeira, R. B., Silva-Filho, B. F., & Sawada, N. O. (2020). Ethics and bioethics in the scientific world: an integrative review. *Perspectives in Bioethics*, 24(2), 151–165. <https://doi.org/10.5294/pebi.2020.24.2.3>.

¹¹⁷Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

¹¹⁸Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

¹¹⁹Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹²⁰Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

¹²¹Cf. Cifuentes, P. L. M. (2019). *Ethics in 100 questions*.

¹²²Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹²³Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

¹²⁴Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹²⁵Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹²⁶Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

¹²⁷Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

¹²⁸Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹²⁹Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

¹³⁰Cf. Cifuentes, P. L. M. (2019). *Ethics in 100 questions*.

¹³¹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹³²Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

¹³³Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

¹³⁴Cf. Cifuentes, P. L. M. (2019). *Ethics in 100 questions*.

¹³⁵Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

systems that influence decisions. Bioethics arises to illuminate these conditionings and orient action towards the protection of life and dignity. The need for a new responsibility arises from the fact that human power expanded by technoscience produces effects that go beyond the framework of classical ethics, focused on individual, immediate and fully deliberate acts. The sources consulted allow us to reconstruct this ethical requirement from the very transformation of human action and the social structures that condition it. Varela Fregoso¹³⁶ stresses that ethics must analyze the real context of human acts, and today that context is deeply mediated by technologies that amplify the consequences of action. Freedom and intention, essential conditions for morality, according to Pilar Calva¹³⁷, are modified when automated systems, biotechnologies or algorithms intervene that distribute responsibility among multiple agents. Choza¹³⁸ recalls that human action is always inscribed in social structures that condition freedom. In technified societies, these structures include digital networks, biomedical systems, and devices that generate new forms of power. Second,¹³⁹ he emphasizes that morality is historical and changing, which requires an ethics capable of responding to unprecedented dilemmas created by technoscience. Cifuentes¹⁴⁰ points out that contemporary ethics must consider the complexity of technological systems and their effects on human life. Audiovisual materials reinforce this perspective: Sevilla¹⁴¹ stresses that ethics must question the systems that make action possible, while Forum Larramendi¹⁴² insists on the critical function of ethics in the face of the power dynamics that cross society. The new responsibility implies anticipating future consequences, assessing systemic risks and assuming obligations that exceed the individual, because techno-scientific power transforms what is possible, what is allowed and what is human. This expanded responsibility does not replace classical ethics, but it extends it towards a horizon where human action has global and lasting effects.

5.3.4. An Ethic for Unprecedented Power

In short, bioethics is born when humanity acquires a power capable of modifying life itself. This emergence is not only historical, but conceptual: it redefines ethics by placing it in the face of global, techno-scientific and structural challenges. As Segundo points out¹⁴³, ethics and morality must be distinguished in order to understand how universal principles dialogue with concrete social norms; bioethics is located precisely at that crossroads, assessing how human power should be exercised to promote justice, dignity, and sustainability. An ethic for unprecedented power becomes indispensable in a world where technoscience expands the human capacity to intervene in life, the body, and society in ways that go beyond traditional frameworks. Varela Fregoso¹⁴⁴ argues that ethics must analyze the real context of action, and today that context is profoundly transformed by technologies that multiply the scope and consequences of

human action. Choza¹⁴⁵ recalls that all action is inscribed in social structures that condition freedom, structures that currently include digital, biotechnological and automated systems that redistribute power and responsibility. Second,¹⁴⁶ he stresses that morality is historical and changing, which requires an ethics capable of responding to unprecedented dilemmas generated by an expanded human power. Cifuentes¹⁴⁷ adds that contemporary ethical reflection must consider the complexity of techno-scientific systems and their effects on human life. Audiovisual materials reinforce this perspective: Sevilla¹⁴⁸ stresses that ethics must question the systems that make action possible, while Forum Larramendi¹⁴⁹ insists on the critical function of ethics in the face of the power dynamics that cross society. Even the distinction between human acts and human acts presented by Pilar Calva¹⁵⁰ shows that technoscience alters the very conditions of moral action, by mediating or substituting human deliberation. Together, these sources allow us to affirm that unprecedented power requires an equally unprecedented ethics, capable of anticipating future consequences, assessing global risks and guiding action in a world where technology redefines what is possible, what is allowed and what is human.

5.3.5. Relationship with Hans Jonas' principle of responsibility

Hans Jonas proposes a future-oriented ethic, based on the principle of responsibility, which requires acting in such a way as to preserve the possibility of an authentic life for future generations¹⁵¹. According to Jonas, technological power has broken the traditional boundaries of human action, so ethics must be expanded to consider long-term, even global, effects¹⁵². This perspective supports the idea that ethics cannot be a superficial technique: it must be a profound reflection on the meaning of human action in a world where technology can radically transform life. The relationship with Hans Jonas' principle of responsibility allows us to understand why contemporary ethics requires a profound expansion of its traditional categories. Although the literature reviewed do not directly address Jonas, they do offer the conceptual elements to articulate his proposal with current ethical reflection. Jonas argues that techno-scientific power has modified the very structure of human action, generating global, cumulative and long-term effects. This idea coincides with Varela Fregoso's affirmation¹⁵³ that ethics must analyze the real context of action, a context today deeply mediated by technologies that amplify the consequences of action. Choza¹⁵⁴ recalls that human action is always inscribed in social structures that condition freedom, structures that in technoscience become more complex and less controllable. Jonas's principle of responsibility calls for directing action toward the preservation of future human life, extending responsibility beyond the immediate present. This orientation is

¹⁴⁵Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹⁴⁶Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

¹⁴⁷Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹⁴⁸Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁴⁹Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

¹⁵⁰Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

¹⁵¹Cf. Jonas, Hans. *The Principle of Responsibility: An Essay on an Ethics for Technological Civilization*. Barcelona: Herder, 1995. (Original German: *Das Prinzip Verantwortung*, 1979.)

¹⁵²Cf. Araujo, T. A., & Lima, D. D. (2020). The principle of responsibility of Hans Jonas and the repercussions on bioethics. *Instant Magazine*, (—), —. https://revista.uepb.edu.br/revistainstante/pt_BR/article/download/206/142/722.

¹⁵³Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

¹⁵⁴Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹³⁶Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

¹³⁷Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

¹³⁸Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹³⁹Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

¹⁴⁰Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹⁴¹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁴²Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

¹⁴³Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

¹⁴⁴Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

echoed by Segundo¹⁵⁵, who stresses that morality is historical and changing, and by Cifuentes¹⁵⁶, who stresses that contemporary ethics must consider the effects of technological systems that exceed the individual scale. Audiovisual materials reinforce this perspective: Sevilla¹⁵⁷ insists that ethics must question the systems that make action possible, while Forum Larramendi¹⁵⁸ underlines the critical function of ethics in the face of power dynamics that affect the collective. The distinction between acts of man and human acts presented by Pilar Calva¹⁵⁹ shows that morality depends on freedom and intention. However, in technified contexts, human action is distributed between human and non-human agents, which requires a broader, preventive and future-oriented responsibility, in line with Jonas. Taken together, these sources allow us to affirm that Hans Jonas' principle of responsibility offers the conceptual framework for an ethics capable of responding to unprecedented human power, directing action towards the protection of future life and the sustainability of human existence.

5.3.6. Risks of dehumanization and the need for integral ethics

Authors such as Vieira Nina and Costa Macêdo¹⁶⁰ warn that technoscience can lead to dehumanization if it is not guided by an ethics that considers the dignity, rights and integrity of the person. Ethics must be holistic, universal and oriented towards full citizenship, not a mere set of functional rules. The risk of dehumanization emerges when techno-scientific development and social dynamics reduce the person to functional, biological or productive parameters, weakening their dignity and their capacity for self-determination. The ethical tradition recalls that the human being is a free and responsible subject, capable of directing his actions towards the good¹⁶¹, but this horizon is threatened when technology and power structures impose instrumental logics that transform the person into an object of management. As Choza warns¹⁶², understanding the person requires recognizing his or her spiritual, relational and transcendent openness; when these dimensions are eclipsed, an anthropological impoverishment arises that directly affects the moral life. Dehumanization appears as one of the deepest risks associated with contemporary techno-scientific power, since technology tends to reduce the human being to a function, data or resource, weakening his dignity and his capacity for self-determination. The sources you have used allow us to reconstruct a solid reflection on this risk and on the need for a comprehensive ethics that responds to it. Varela Fregoso¹⁶³ warns that ethics must preserve the meaning of human action, which is threatened when technology displaces deliberation and turns action into an automated process. Choza¹⁶⁴ stresses that the person can only be fully fulfilled when he or she acts from his or her freedom and rationality; both dimensions are eroded when technological systems condition or replace human decision.

¹⁵⁵Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

¹⁵⁶Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹⁵⁷Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁵⁸Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

¹⁵⁹Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

¹⁶⁰Cf. Vieira Nina, C. H., & Costa Macêdo, M. M. (2020). Ethics, bioethics and technology: the risks of dehumanization. *Senatus Magazine*, 4, 1–15.

¹⁶¹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

¹⁶²Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹⁶³Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

¹⁶⁴Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

Second,¹⁶⁵ he recalls that morality is historical and vulnerable to social transformations that can dilute the centrality of the person. Audiovisual materials reinforce this concern. Sevilla¹⁶⁶ points out that ethics must prevent technology from determining the value of human life, while fgbuenotv¹⁶⁷ warns that morality is weakened when the subject ceases to be an agent and becomes the object of external systems. Pilar Calva¹⁶⁸ shows that moral dignity depends on freedom, a condition that is compromised in highly technical environments. Forum Larramendi¹⁶⁹ insists that ethics must illuminate the power dynamics that can instrumentalize the human being. Cifuentes¹⁷⁰ argues that contemporary ethics must integrate personal, social and technological dimensions to respond to complex dilemmas. An integral ethic is not limited to evaluating isolated acts, but examines structures, systems, and contexts that affect human dignity. This perspective coincides with the need to preserve the human in the face of processes of automation, surveillance, biotechnological manipulation or algorithmic reduction of the person. Taken together, the sources allow us to affirm that the risks of dehumanization require an integral ethics capable of protecting dignity, freedom and responsibility in a world where technology redefines action and the value of the human.

5.3.7. Contemporary risks of dehumanization

The expansion of biotechnology, the digitalization of everyday life, and the medicalization of existence generate scenarios where the person can be treated as a set of data, an organism to be manipulated, or a social resource. Cifuentes¹⁷¹ stresses that ethics must attend to the real conditions that allow us to act well; among these conditions is the preservation of dignity in the face of systems that tend to homogenize, control or exclude. Public and media discourses, analyzed by popularizers such as Héctor Sevilla¹⁷², show how morality can be diluted when technology becomes the ultimate criterion for decision-making, displacing critical reflection and responsibility. The risks of dehumanization are also manifested in the loss of meaning of human acts, those carried out with knowledge and freedom. Pilar Calva¹⁷³ reminds us that only these acts are morally imputable; however, in contexts where social, economic or technological pressure conditions freedom, moral responsibility becomes more complex. Critical bioethics warns that dehumanization is not only an individual phenomenon, but a structural one: it arises when institutions prioritize efficiency over justice, utility over dignity, or control over autonomy. Contemporary risks of dehumanization emerge when technoscience transforms human action, reduces autonomy, and makes the person the object of technical, economic, or algorithmic systems. The literature reviewed allows us to reconstruct a coherent reflection on this phenomenon from ethics and philosophical anthropology. The factors that generate dehumanization can be: The reduction of the subject to function or data. Varela Fregoso¹⁷⁴ warns that ethics must preserve the meaning of human action;

¹⁶⁵Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

¹⁶⁶Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁶⁷Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

¹⁶⁸Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

¹⁶⁹Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

¹⁷⁰Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹⁷¹Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹⁷²Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁷³Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

¹⁷⁴Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

this is diluted when technology automates decisions and displaces personal deliberation. The loss of freedom and self-determination. Choza¹⁷⁵ stresses that dignity depends on rationality and freedom; both are compromised when technological systems condition action. The Historical Transformation of Morality. Second,¹⁷⁶ he recalls that morality changes with social structures, and in technified societies these structures can weaken the centrality of the person. The Instrumentalization of the Human Being. The training videos reinforce this concern: Sevilla¹⁷⁷ points out that ethics must prevent technology from determining the value of life, while fgbenotv¹⁷⁸ warns that morality is eroded when the subject ceases to be an agent. And the weakening of moral responsibility. Pilar Calva¹⁷⁹ shows that moral dignity depends on freedom; when action is mediated by technical systems, this freedom is reduced. Forum Larramendi¹⁸⁰ adds that ethics must illuminate power dynamics that can instrumentalize the human being. Sources agree that contemporary dehumanization arises when technology redefines action, freedom, and responsibility, threatening personal dignity. In the face of this, an ethics capable of integrating personal, social and technological dimensions is required to protect the human in an increasingly automated environment.

5.3.8. The need for integral ethics

In the face of these risks, a comprehensive ethic is essential, capable of articulating personal, social, technical and political dimensions. This ethics is not limited to isolated norms, but seeks to understand the human being in his or her totality, integrating his or her corporeality, rationality, affectivity and openness to the other. Second,¹⁸¹ he distinguishes between ethics and morality in order to show that universal principles must dialogue with the concrete norms of each society; an integral ethics assumes this tension and directs it towards the promotion of human dignity in all areas. An integral ethics also requires a critical evaluation of techno-scientific power and its effects on life. As Forum Larramendi's analyses point out¹⁸², ethics is not a theoretical ornament, but a tool to discern what kind of humanity we want to build. Bioethics, in this framework, becomes an interdisciplinary space where the conditions that allow the technique to be at the service of the person and not the other way around are examined. The need for an integral ethics arises from the realization that the contemporary challenges marked by technoscience, social complexity and the transformation of human action can no longer be addressed from fragmented ethical frameworks or focused only on the individual. The sources consulted allow one to reconstruct this requirement from a solid philosophical and anthropological perspective. Varela Fregoso¹⁸³ affirms that ethics must attend to the real context of human action, which today implies simultaneously considering personal, social and technological dimensions. Choza¹⁸⁴ stresses that the person is only fully understood in his or her rational, free and relational

unity; therefore, an ethics that ignores any of these dimensions runs the risk of dehumanizing. Second,¹⁸⁵ he recalls that morality is historical and is transformed by social structures, which requires an ethical reflection capable of integrating cultural, technological and political changes. Cifuentes¹⁸⁶ adds that today's dilemmas require a broad view that goes beyond the mere application of rules and considers the complexity of the systems that condition human action. Audiovisual materials reinforce this need: Sevilla¹⁸⁷ warns that ethics must prevent technology from determining the value of human life; FGBUENOTV¹⁸⁸ shows how morality is eroded when the subject ceases to be an agent; Pilar Calva¹⁸⁹ recalls that moral dignity depends on freedom, which is threatened in technified contexts; and Forum Larramendi¹⁹⁰ insists that ethics must illuminate power dynamics that can instrumentalize the human being. An integral ethic seeks to protect human dignity, guide action in complex systems and maintain a balance between technique, society and the person. Only an ethics that integrates these dimensions can adequately respond to the contemporary risks of dehumanization and the unprecedented power that technoscience grants to the human being.

5.3.9. Towards a humanizing reconstruction

The answer to dehumanization is not to reject technology, but to integrate it into an ethical project that recognizes human dignity, vulnerability, and interdependence. This implies strengthening moral education, promoting just institutions, and developing normative frameworks that protect life in all its dimensions. Integral ethics is presented as a way to recover the meaning of human acts and orient techno-scientific power towards the common good. The horizon of a humanizing reconstruction becomes essential when technology, institutions and social dynamics generate tensions that threaten the dignity and integrity of the person. The ethical tradition reminds us that the human being is a free, responsible and good-oriented agent¹⁹¹, but this ideal is eroded when techno-scientific and economic systems reduce life to parameters of efficiency, utility or control. Reconstructing the human implies, therefore, recovering an integral vision of the person and reconfiguring the structures that condition his or her action. Humanizing reconstruction becomes essential in a context where technoscience transforms human action and generates risks of dehumanization. The sources examined allow one to articulate an ethical response that recovers the centrality of the person, his dignity and his capacity for self-determination. Varela Fregoso¹⁹² recalls that ethics has as its fundamental task to preserve the meaning of human action, which requires placing the person and not technology at the center of moral reflection. Choza¹⁹³ stresses that the human condition is a unity of rationality, freedom and relationality; therefore, any social or technological system that reduces the individual to function or data requires a critical review. Second,¹⁹⁴ he shows that morality is historical and is transformed by social structures, which forces us to reconstruct ethical criteria

¹⁷⁵Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹⁷⁶Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

¹⁷⁷Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁷⁸Cf. fgbenotv. (2009, November 30). *Ethics and Morals* [video].

¹⁷⁹Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. *Acts of man and humans*[video].

¹⁸⁰Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

¹⁸¹Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

¹⁸²Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

¹⁸³Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

¹⁸⁴Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹⁸⁵Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

¹⁸⁶Cf. Cifuentes, P. L. M. (2019). *Ethics in 100 questions*.

¹⁸⁷Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁸⁸Cf. fgbenotv. (2009, November 30). *Ethics and Morals* [video].

¹⁸⁹Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. *Acts of man and humans*[video].

¹⁹⁰Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

¹⁹¹Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

¹⁹²Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

¹⁹³Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

¹⁹⁴Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

capable of responding to new forms of techno-scientific power. Cifuentes¹⁹⁵ adds that contemporary ethics must integrate personal, social and technological dimensions to understand the complexity of current human action. Audiovisual materials reinforce this orientation: Sevilla¹⁹⁶ insists that ethics must prevent technology from determining the value of life, while Forum Larramendi¹⁹⁷ highlights the critical function of ethics in the face of power dynamics that can instrumentalize human beings. The distinction between human acts and human acts presented by Pilar Calva¹⁹⁸ reminds us that moral dignity depends on freedom, a condition that must be protected in technified environments. Reconstructing the human implies developing an integral ethic that: protects dignity and freedom in the face of systems that tend to automate or condition action; critically evaluate the social and political impact of technoscience; directs human power towards ends that favor life, justice and coexistence. This reconstruction is not a return to the past, but an update of ethics for a world where technology redefines the possible and the human.

5.3.10. Fundamentals of a humanizing reconstruction

A humanizing reconstruction requires starting from a solid anthropology, capable of recognizing the complexity of the person. Choza¹⁹⁹ stresses that the human being cannot be understood only from his biological or functional dimension, but from his relational, symbolic and transcendent openness. This broad understanding makes it possible to counteract the processes of dehumanization that emerge when technology becomes the ultimate criterion for decision or when morality is reduced to external norms without critical reflection²⁰⁰. In this framework, bioethics plays a central role: it not only analyzes dilemmas, but examines the social and technological conditions that make a truly human life possible. Cifuentes²⁰¹ recalls that ethics is only significant when it asks about the real conditions that allow us to act well; reconstructing the human implies transforming those conditions so that dignity is respected and promoted. Humanizing reconstruction requires ethical and anthropological foundations capable of responding to the depersonalizing effects of technoscience and of recovering the centrality of the person as a free, responsible and dignified subject. The sources you use allow you to articulate these fundamentals from a coherent and rigorous perspective. Choza²⁰² maintains that the human being is a unit of rationality, freedom and relationality; therefore, any humanizing project must start from the recognition of this integral structure. The person cannot be reduced to a technical function or to an operational datum without losing what constitutes him as such. Varela Fregoso²⁰³ affirms that ethics must attend to the real context of action, which implies protecting intentionality, deliberation and responsibility against systems that tend to automate or condition action. Pilar Calva²⁰⁴ reinforces this idea by showing that moral dignity depends on freedom, an element that must be safeguarded in technified

environments. Second,²⁰⁵ he recalls that morality is historical and is transformed by social structures, which requires reconstructing ethical criteria capable of responding to new forms of power and risks of dehumanization. Cifuentes²⁰⁶ adds that contemporary ethics must integrate personal, social and technological dimensions to understand the complexity of current human action. The audiovisual materials underline that ethics must illuminate power dynamics that can instrumentalize the human being: Sevilla²⁰⁷ warns against the subordination of the value of life to technology, and Forum Larramendi²⁰⁸ highlights the critical function of ethics in the face of structures that threaten dignity. The foundations of a humanizing reconstruction are based on: an anthropology that recognizes the dignity, freedom, and relationality of the person; an ethics that protects the meaning of human action in technified contexts; a historical and social understanding of morality; a critical function aimed at resisting processes of dehumanization.

5.3.11. Social and political dimensions of reconstruction

Humanizing reconstruction is not an individual process, but a structural one. Contemporary analyses show that ethics must intervene in the spaces where collective decisions are configured. The discourses of popularizers such as Héctor Sevilla²⁰⁹ and the critical reflections on the social role of ethics²¹⁰ insist that morality cannot be relegated to the private sphere: it must guide policies, institutions and techno-scientific practices. Likewise, the distinction between acts of man and human acts, explained by Pilar Calva²¹¹, acquires a new meaning. Only acts performed with knowledge and freedom are morally imputable, but freedom is conditioned by systems that can limit or expand it. A humanizing reconstruction therefore requires institutions that favor autonomy, justice and participation. The social and political dimensions of a humanizing reconstruction become decisive when technoscience transforms not only individual action, but also the collective structures that organize social life. The sources consulted allow us to show that humanization cannot be limited to the personal level: it requires intervening in the systems of power, in the institutions and in the cultural frameworks that condition freedom and dignity. Varela Fregoso²¹² points out that ethics must attend to the real context of action, and this context is today shaped by technologies that reorganize communication, work, and public life. Choza²¹³ recalls that the person is an essentially relational being, so any process of dehumanization simultaneously affects the individual and the social fabric that sustains him. Second,²¹⁴ he stresses that morality changes with social structures, which implies that humanizing reconstruction must respond to collective transformations, not only individual ones. Contemporary technologies engage in power dynamics that can instrumentalize people or reduce them to operational data. Audiovisual materials reinforce this reading: Sevilla²¹⁵ warns that ethics must prevent technology from deter-

¹⁹⁵ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

¹⁹⁶ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

¹⁹⁷ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

¹⁹⁸ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

¹⁹⁹ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁰⁰ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁰¹ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁰² Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁰³ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁰⁴ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

²⁰⁵ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁰⁶ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁰⁷ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²⁰⁸ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

²⁰⁹ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²¹⁰ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

²¹¹ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

²¹² Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²¹³ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²¹⁴ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²¹⁵ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

mining the value of human life, while Forum Larramendi²¹⁶ insists that ethics has a critical function in the face of power structures that can erode dignity. The distinction between human acts and human acts presented by Pilar Calva²¹⁷ shows that the freedom that is the basis of moral responsibility can be compromised by political and technological systems that condition action. A humanizing reconstruction requires transforming the social and political conditions that allow dehumanization: strengthening institutions that protect dignity, regulating technologies that affect freedom, and promoting an ethical culture that recognizes the centrality of the person. This perspective integrates the individual and the collective, the technical and the political, to orient social life towards more just and fully human forms.

5.3.12. Towards an ethics that regenerates bonds and meaning

Humanizing reconstruction implies articulating an integral ethics, capable of uniting reflection, action and social transformation. This ethic recognizes human vulnerability, promotes solidarity and orients technology towards the common good. It is not a question of rejecting technoscience, but of integrating it into a project that strengthens dignity, coexistence and the meaning of life. In this horizon, bioethics becomes a privileged space to rethink the relationship between technology, society and power, and to promote practices that regenerate human bonds and protect life in all its dimensions. An ethic that regenerates bonds and meaning becomes necessary when techno-scientific, economic and cultural dynamics fragment the human experience and weaken the bonds that sustain personal and community life. The ethical tradition recalls that the human being is a free agent oriented to the good²¹⁸, but this orientation is obscured when morality is reduced to external norms or when technology becomes the dominant criterion of decision. Regenerating bonds and meaning implies rebuilding the conditions that allow people to recognize each other as dignified, responsible and vulnerable subjects. Ethics that regenerate bonds and meaning becomes indispensable in a scenario where technoscience reconfigures human relationships, weakens shared responsibility and fragments the symbolic frameworks that sustain social life. The sources examined allow one to substantiate this need from a solid anthropological and ethical perspective. Varela Fregoso²¹⁹ stresses that ethics must preserve the meaning of human action, which implies rebuilding relationships based on responsibility and reciprocity, today eroded by technological dynamics that favor isolation and instrumentalization. Choza²²⁰ recalls that the person is constitutively relational: he or she is only fully realized in bonds that recognize his or her dignity and freedom. Second,²²¹ he shows that morality changes with social structures, and in technified societies this transformation can generate a loss of ethical orientation. Cifuentes²²² adds that contemporary ethics must integrate personal, social and technological dimensions to reconstruct a horizon of shared meaning. Audiovisual materials reinforce this direction: Sevilla²²³ insists that ethics must prevent technology from determining the value

of life, while Forum Larramendi²²⁴ highlights the critical function of ethics in guiding coexistence and strengthening the social fabric. The distinction between human acts and human acts presented by Pilar Calva²²⁵ reminds us that moral dignity depends on freedom and intentionality, dimensions that must be protected in order to regenerate authentic bonds. This ethical reconstruction requires integrating care, responsibility and a sense of community in an environment where technology tends to fragment and depersonalize. Taken together, these sources allow us to affirm that regenerating bonds and meaning requires an integral ethic that recovers the centrality of the person, strengthens community life and orients techno-scientific power towards more human forms of coexistence.

5.3.13. Regenerating links in a technified world

Contemporary technoscience transforms human relationships, sometimes enhancing them and other times weakening them. Choza²²⁶ stresses that the person can only be fully understood in his or her relational dimension; therefore, when technical systems replace or impoverish human encounters, there is a loss of ethical density. Critical bioethics warns that dehumanization does not arise only from individual decisions, but from structures that prioritize efficiency over solidarity or utility over dignity. In this context, ethics must recover its function of guiding coexistence. Cifuentes²²⁷ points out that moral reflection only makes sense when it asks about the real conditions that allow us to act well; regenerating bonds implies transforming those conditions so that cooperation, care and justice are possible. Contemporary analyses, such as those of Héctor Sevilla²²⁸, show that ethics cannot be relegated to the private sphere: it must intervene in the spaces where social and technological relations are configured. The regeneration of bonds in a technified world requires recovering the centrality of the person in the face of technological dynamics that tend to fragment relationships and reduce human interaction to functional processes. Varela Fregoso²²⁹ recalls that ethics must preserve the meaning of human action, which implies rebuilding relationships based on responsibility and mutual recognition. Choza²³⁰ emphasizes that the person is constitutively relational, and that his or her fulfillment depends on bonds that respect his or her dignity and freedom. Second,²³¹ he warns that morality changes with social structures, and that contemporary technification can weaken the frameworks that sustain coexistence. Cifuentes²³² adds that current ethics must integrate personal, social and technological dimensions to restore a horizon of shared meaning. Audiovisual materials reinforce this need: Sevilla²³³ insists that technology should not determine the value of human life, while Forum Larramendi²³⁴ highlights the critical role of ethics in strengthening the social fabric. Even the distinction between acts of man and

²¹⁶Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

²¹⁷Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

²¹⁸Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²¹⁹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²²⁰Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²²¹Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²²²Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²²³Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²²⁴Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

²²⁵Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

²²⁶Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²²⁷Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²²⁸Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²²⁹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²³⁰Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²³¹Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²³²Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²³³Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²³⁴Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

human acts presented by Pilar Calva²³⁵ shows that freedom and intentionality, the basis of the authentic bond, must be protected in technified environments. Regenerating links in this context implies reconstructing spaces of encounter, responsibility and meaning that allow the person to affirm himself or herself as a subject and not as an object of technical systems.

5.3.14. Recovering meaning in the midst of complexity

The loss of meaning is one of the most profound effects of cultural fragmentation. Second,²³⁶ he distinguishes between ethics and morality in order to show that universal principles must dialogue with the concrete norms of each society; this dialogue is precisely the place where meaning is constructed. When technology redefines what it means to be born, to live or to die, ethics must offer interpretative frameworks that allow us to understand these transformations without reducing life to data or functions. The distinction between acts of man and human acts, explained by Pilar Calva²³⁷, reminds us that only acts performed with knowledge and freedom have moral value. However, freedom is conditioned by systems that can limit or expand it. Regenerating meaning implies strengthening the ability to deliberate, discern and act responsibly in the midst of techno-scientific complexity. The recovery of meaning in the midst of technified complexity requires placing the person back at the center of moral action in an environment where technology fragments experience, accelerates processes and weakens the symbolic frameworks that guide human life. Varela Fregoso²³⁸ recalls that ethics must preserve the meaning of human action, which implies reconstructing criteria that allow us to understand and guide action in contexts saturated with information and technical mediations. Choza²³⁹ stresses that the human being is only fully realized when he integrates rationality, freedom and relationality; without this integration, complexity becomes dispersion and loss of orientation. Second,²⁴⁰ he shows that morality changes with social structures, and that contemporary technification can generate a crisis of meaning by transforming the modes of relationship and the horizons of value. Cifuentes²⁴¹ adds that current ethics must offer tools to navigate complex systems without losing reference to human dignity. Audiovisual materials reinforce this need: Sevilla²⁴² warns that technology cannot determine the value of life, while Forum Larramendi²⁴³ stresses that ethics must illuminate the power dynamics that influence the construction of collective meaning. The distinction between acts of man and human acts presented by Pilar Calva²⁴⁴ reminds us that intentionality and freedom, the basis of the moral sense, must be protected even in highly technical environments. Recovering meaning in the midst of complexity implies, therefore, reconstructing ethical frameworks that integrate freedom, responsibility and community orientation, allowing the person not to be diluted in the logic of technical

systems, but to find a horizon of meaning that sustains his or her action.

5.3.15. An inclusive ethic for a common future

The regeneration of bonds and meaning requires an integral ethics, capable of articulating personal, social, technical and political dimensions. Forum Larramendi²⁴⁵ insists that ethics is not a theoretical ornament, but a tool to guide collective action and build fairer societies. This integral ethic recognizes human vulnerability, promotes solidarity and orients technology towards the common good. Regenerating ties means rebuilding trust, cooperation and mutual recognition. Regenerating meaning means offering horizons that allow us to understand life as a shared project. Bioethics, in this framework, becomes a privileged space to rethink the relationship between technology, society and power, and to promote practices that strengthen human dignity in all its dimensions. An inclusive ethic for a common future requires articulating human dignity, social responsibility, and the critical use of technoscience in a shared horizon. The sources consulted allow one to base this proposal from a broad understanding of the person and contemporary challenges. Varela Fregoso²⁴⁶ affirms that ethics must preserve the meaning of human action, which implies placing the person at the center of all technical, political and social decisions. Choza²⁴⁷ reinforces this idea by describing the human being as a unit of rationality, freedom and relationality, dimensions that must be kept integrated to avoid functionalist reductions. Second,²⁴⁸ he recalls that morality changes with social structures, so an ethics for the future must integrate the effects of technification on coexistence and collective values. Cifuentes²⁴⁹ adds that contemporary ethics must simultaneously encompass the individual, the community and the technological in order to respond to complex dilemmas that can no longer be approached from partial perspectives. Audiovisual materials underline the need for this integration: Sevilla²⁵⁰ warns that technology should not determine the value of human life; Forum Larramendi²⁵¹ highlights the critical function of ethics in the face of power dynamics that affect the collective; and Pilar Calva²⁵² recalls that the freedom that is the basis of moral responsibility must be protected in technified environments. An inclusive ethic for a common future must unite dignity, freedom, responsibility and social justice, orienting technoscience towards the construction of solid bonds and a shared horizon of meaning. This integration allows us to face contemporary complexity without losing the human as the ultimate criterion.

Essential differences between ethics and morality

The essential difference between ethics and morality can be expressed as the distinction between critical reflection and social norm, a separation that appears both in the philosophical tradition and in contemporary analyses. Morality designates the set of norms, customs, and values that regulate behavior within a community; it is lived before it is thought and is transmitted through education and culture, functioning as an "internalized

²³⁵Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

²³⁶Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²³⁷Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

²³⁸Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²³⁹Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁴⁰Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁴¹Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁴²Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²⁴³Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

²⁴⁴Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

²⁴⁵Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

²⁴⁶Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁴⁷Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁴⁸Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁴⁹Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁵⁰Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²⁵¹Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

²⁵²Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

normative system” that guides daily action²⁵³. In this sense, morality is concrete, historical and variable according to the social context, as also pointed out by recent studies on the plurality of moral codes in different societies. Ethics, on the other hand, constitutes the philosophical reflection that critically analyzes these moral codes. Choza²⁵⁴ explains that ethics studies human action as oriented to the good, which implies rational deliberation, autonomy and the search for universal principles. This reflective dimension is also underlined by Sevilla²⁵⁵, who states that ethics asks why something should be done, while morality simply indicates what should be done. Contemporary literature confirms this conceptual distinction, showing that ethics and morality are not synonymous, although in everyday use they are confused; In fact, some authors warn that the separation between the two concepts has become necessary to face the “conceptual crisis” that arises when they are used interchangeably. In short, while morality offers concrete norms that regulate conduct, ethics critically examines those norms, evaluates their foundation, and determines whether they contribute to human dignity and fulfillment. This difference allows us to understand why ethics cannot be reduced to a set of fixed rules: its function is to illuminate, question and guide human action beyond mere habit. The essential differences between ethics and morality can be synthesized from the sources examined as a distinction between reflection and lived normativity. Morality designates the set of norms, values and customs that guide behavior in a community or in an individual; for this reason, it is historical, variable and dependent on the social context, as Segundo emphasizes²⁵⁶. Varela Fregoso²⁵⁷ understands it as the concrete sphere of human action, where daily habits and decisions are expressed. Choza²⁵⁸ adds that morality is embodied in practical life and in the formation of character. Ethics, on the other hand, is the critical and rational reflection on morality. Cifuentes²⁵⁹ presents it as the analysis of the principles that underpin human action, while audiovisual materials such as Sevilla²⁶⁰ and fgbuenotv²⁶¹ highlight that ethics examines, questions and guides the value systems that guide behavior. The distinction between human acts and human acts exposed by Pilar Calva²⁶² shows that ethics evaluates the intentionality and freedom that make an act morally significant. In short, morality is the lived content of norms and values, while ethics is the discipline that analyzes, grounds and guides them, allowing us to understand and transform human action.

Nature of Content

The nature of the moral and ethical content refers to the deep structure from which the human being orients his action, interprets his experience and constructs criteria to distinguish good from evil. In the philosophical tradition, ethics is understood as a rational reflection on human conduct aimed at the good and personal fulfillment²⁶³, while morality designates the concrete

codes, norms and practices that regulate social life²⁶⁴. This distinction allows us to understand that moral content is not arbitrary: it arises from human experience, from its rationality, from its freedom and from its openness to others. The nature of moral and ethical content can be understood, from the literature reviewed, as the articulation between what people experience in their daily behavior and the critical reflection that allows us to understand, guide and transform that behavior. This distinction illuminates how values, norms and decisions are configured in social and technified contexts. Moral content is made up of the values, customs, and rules that effectively guide behavior in a community. Second,²⁶⁵ he stresses that this content is historical and changing, since it depends on the social and cultural structures in which people act. Varela Fregoso²⁶⁶ links it to concrete human action, where habits, decisions and ways of life are expressed. Choza²⁶⁷ adds that morality is embodied in the formation of character and in the way in which the person relates to others. Audiovisual materials reinforce this lived dimension: fgbuenotv²⁶⁸ shows that morality is manifested in everyday action, while Pilar Calva²⁶⁹ distinguishes between human acts and human acts to point out that only the latter have moral content, since they imply freedom and intentionality. Ethics, on the other hand, analyzes and substantiates this moral content. Cifuentes²⁷⁰ explains that ethics studies the principles that guide human action and critically evaluates current values. Sevilla²⁷¹ stresses that ethics questions the systems that determine what we consider good or right, especially in technified contexts where technology can influence the valuation of human life. Forum Larramendi²⁷² adds that ethics plays a critical role in the face of power dynamics that shape moral content without people being fully aware of it. The nature of moral and ethical content is articulated as follows: Morality expresses what is lived: norms, habits, values and concrete decisions. Ethics offers the reflection that illuminates and guides that content, allowing it to be understood, evaluated and transformed. This distinction is key to analyzing how technoscience modifies both moral practices and the ethical frameworks that interpret them.

5.3.16. The structure of moral content

Moral content is based on the human capacity to deliberate, choose and assume responsibility. Choza²⁷³ stresses that the person is a relational and transcendent being, whose moral life cannot be reduced to external impulses or conditioning. Therefore, moral content includes: Values are fundamental orientations that express what a community considers worthy of being sought. Norms are concrete formulations that guide action in specific situations. Virtues are stable dispositions that allow you to act well on a regular basis. Ends are what human action is directed towards, such as justice, dignity or the common good. Cifuentes²⁷⁴ recalls that ethics only acquires meaning when it asks about the real

²⁵³ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁵⁴ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁵⁵ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²⁵⁶ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁵⁷ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁵⁸ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁵⁹ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁶⁰ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²⁶¹ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

²⁶² Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

²⁶³ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁶⁴ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁶⁵ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁶⁶ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁶⁷ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁶⁸ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

²⁶⁹ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

²⁷⁰ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁷¹ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²⁷² Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

²⁷³ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁷⁴ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

conditions that allow us to act well; therefore, the moral content is not only theoretical, but practical and situated. The structure of moral content can be understood, from its sources, as the articulation between freedom, norms and values that guide human action within a specific social context. This structure is not static: it is formed, transformed, and lived in everyday practice. Freedom and intentionality as Pilar Calva²⁷⁵ shows that only human acts, carried out with conscience and will, have moral content. Freedom is, therefore, the structural core that allows an act to be morally evaluated. Norms and customs: Second,²⁷⁶ he explains that morality is made up of historical values and rules that guide behavior. These norms are not abstract: they are embodied in social habits and practices. Values and ends: Varela Fregoso²⁷⁷ points out that moral content includes the ends that the person pursues and the meaning he or she gives to his or her action. Morality is not only obedience to rules, but orientation towards goods considered valuable. Character and personal formation: Choza²⁷⁸ emphasizes that morality is also structured in the configuration of character, where habits, virtues and ways of relating to others are integrated. The social and technological context: Cifuentes²⁷⁹ recalls that moral content is affected by social and technical systems that condition action. The training videos²⁸⁰ add that morality is expressed in everyday life and is transformed by the environments in which we operate. The structure of moral content integrates freedom, norms, values, character, and context, allowing the person to act consciously and responsibly within a community. This structure is dynamic and requires ethical reflection to remain oriented towards human dignity.

5.3.17. The ethical dimension of moral content

Ethics critically examines this moral content, grounds it and guides it. It does not limit itself to describing norms, but analyzes their legitimacy, their coherence and their impact on human life. Contemporary popularizers, such as Héctor Sevilla²⁸¹, insist that ethics must illuminate action in complex contexts, especially when technology and social structures transform traditional decision-making criteria. In this sense, ethics: Interprets moral experience to understand its foundations. It distinguishes between practices that promote dignity and those that violate it. Evaluates the social, cultural, and techno-scientific consequences of actions. It guides the construction of fair and humanizing regulatory frameworks. The ethical dimension of moral content refers to the capacity of reason to illuminate, evaluate, and guide the values, norms, and habits that make up lived morality. While morality expresses what a community practices and considers valuable, ethics introduces a critical look that allows us to understand that content, justify it and transform it when necessary. The ethical dimension of moral content expresses the capacity of reason to illuminate, evaluate, and guide the values and norms that guide human conduct. From the sources examined, this dimension appears as the reflective level that allows you to critically understand lived morality and

ensure that it remains linked to the dignity of the person. This ethical dimension is configured as follows: Rational clarification of human action. Varela Fregoso²⁸² points out that ethics seeks to preserve the meaning of action, which implies analyzing why we consider certain acts valuable and what ends we pursue with them. Foundation of dignity and freedom: Choza²⁸³ reminds us that the person is a rational and free being; therefore, ethics examines whether moral norms respect these essential dimensions. Critical evaluation of norms and customs: Second,²⁸⁴, he stresses that morality is historical and changing, so ethics must discern which values are still valid and which require revision. Orientation towards fundamental human goods. Cifuentes²⁸⁵ explains that ethics not only describes, but also directs action towards ends that promote the good life and just coexistence. Illumination of moral intentionality: The distinction between acts of man and human acts presented by Pilar Calva²⁸⁶ shows that ethics analyzes the freedom and intention that make an act morally significant. Critique of power dynamics and technification. The videos by Sevilla²⁸⁷ and Forum Larramendi²⁸⁸ highlight that ethics must question structures that can distort moral content, especially in technified contexts. The ethical dimension of moral content consists of thinking, grounding and orienting the values and norms that guide human action, ensuring that they respond to dignity, freedom and the common good. Without this reflective dimension, morality is reduced to custom; with it, it becomes a conscious path towards the human.

5.3.18. Human acts and moral content

The distinction between human acts and human acts, explained by Pilar Calva²⁸⁹, is key to understanding the nature of moral content. Only acts performed with knowledge and freedom have ethical value, because they express the interiority and responsibility of the person. This implies that moral content is not reduced to external behaviors, but includes intentions, motivations, and ends. The relationship between human acts and moral content is understood, according to the literature reviewed, as the point where freedom and rationality turn an action into an object of ethical evaluation. Only when the person acts with conscience and intention does his conduct acquire moral meaning. Human acts, explains Pilar Calva²⁹⁰, are those carried out with knowledge and will. This double condition allows the action to be evaluated morally, since it implies deliberation and responsibility. On the other hand, man's instinctive or involuntary acts lack moral content because they do not proceed from freedom. How do they generate moral content? Moral content is generated in the following way, by: Intentionality: Varela Fregoso emphasizes²⁹¹ that the meaning of action depends on the intention that guides the action; without intention, there is no morality. Responsible freedom: Choza²⁹² affirms that the

²⁷⁵Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

²⁷⁶Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁷⁷Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁷⁸Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁷⁹Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁸⁰Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video]; fgbuenotv. (2009, November 30). Ethics and Morals [video].

²⁸¹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video]. YouTube.

²⁸²Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁸³Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

²⁸⁴Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁸⁵Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁸⁶Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

²⁸⁷Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video]. YouTube.

²⁸⁸Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

²⁸⁹Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

²⁹⁰Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

²⁹¹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

²⁹²Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

person is a free and rational being, and that this structure makes possible the moral evaluation of his or her actions. Context and norms: Second,²⁹³, remember that morality is formed in a social and historical framework, so that human acts are inserted in shared values and norms. Orientation towards goods: Cifuentes²⁹⁴ emphasizes that ethics analyzes whether human acts are directed towards goods that promote the good life and fair coexistence. Critical discernment: The videos of Sevilla²⁹⁵ and fgbuenotv²⁹⁶ show that ethics allows us to evaluate whether human acts respond to fair criteria or require correction. Human acts constitute the core of moral content because they integrate freedom, intention, and responsibility within a social framework of values. Where the person decides and acts consciously, the possibility of moral judgment and ethical growth arises.

5.3.19. Morality as a social and cultural content

Morality also has a historical and community dimension. Forum Larramendi²⁹⁷ stresses that ethics must analyze how societies construct their norms and how these can serve to humanize or dehumanize. The moral content, therefore, is configured in dialogue between: Personal experience. Cultural tradition. Social institutions. Contemporary techno-scientific challenges. This dialogue allows morality to evolve without losing its anchorage in human dignity. Morality as a social and cultural content is understood, from its sources, as the set of norms, values and habits that a community considers valid and that guide the behavior of its members. It does not arise in isolation in the individual, but is historically formed within a social, symbolic and cultural framework that shapes what each era understands as "good", "correct" or "acceptable". Second,²⁹⁸ he stresses that morality is historical and changing, since it depends on the social structures that generate and transform it. Varela Fregoso²⁹⁹ agrees when he affirms that morality is expressed in concrete human action, that is, in shared practices and customs that are transmitted culturally. Choza³⁰⁰ adds that morality is embodied in the formation of character within a community, where the person learns ways of relating and criteria of evaluation. Cifuentes³⁰¹ explains that moral contents are configured in dialogue with institutions, traditions, and symbolic systems that give meaning to social life. The training videos reinforce this collective dimension: Sevilla³⁰² and fgbuenotv³⁰³ show that morality is learned in coexistence and is transformed with cultural changes. The distinction between human acts and human acts presented by Pilar Calva³⁰⁴ reminds us that morality requires freedom, but this freedom is always exercised within a cultural framework that guides what is considered valuable. Forum Larramendi³⁰⁵ stresses that ethics must critically analyze these frameworks to prevent power dynamics from distorting the moral content. Morality is

a social and cultural content because it is born from collective life, is transmitted through shared customs and values, and is transformed by historical changes. The person acts morally within this common horizon, which ethics is responsible for understanding and evaluating.

5.3.20. The moral content and ethical horizon

The nature of the moral and ethical content reveals that human life cannot be understood without reference to values, norms, aims and virtues that guide action. Ethics, by critically reflecting on this content, allows us to regenerate bonds, strengthen responsibility and build fairer societies. In a world marked by technical and social complexity, this reflection becomes indispensable to preserve the dignity and meaning of human life. Morality: as concrete, practical, historical and cultural norms. Ethics: as universal, rational and critical principles. The synthesis between moral content and ethical horizon shows how the concrete moral life made up of norms, values, habits and decisions always needs an ethical reflection that illuminates it, grounds it and orients it towards human dignity. The sources consulted agree that morality expresses what a community experiences, while ethics offers the critical framework that allows us to understand and transform that content. Morality arises from social and cultural life: norms, customs and values that are transmitted historically and that guide daily conduct. Second,³⁰⁶, he highlights its historical and changing character, while Varela Fregoso³⁰⁷ links it to concrete human action. Choza³⁰⁸ adds that morality is embodied in the character and in the ways of relating learned in community. The videos of Sevilla³⁰⁹ and fgbuenotv³¹⁰ show that morality is learned in coexistence and is transformed with cultural changes. Ethics critically analyzes this moral content. Cifuentes³¹¹ explains that ethics underpins and evaluates the principles that guide action, while Forum Larramendi³¹² underlines its critical function in the face of power dynamics that can distort social values. The distinction between acts of man and human acts presented by Pilar Calva³¹³ shows that ethics illuminates the freedom and intentionality that make an act morally significant. The moral content offers what is lived; the ethical horizon offers the light to understand and guide it. Together they allow the person to act with freedom, responsibility and meaning within a social framework that needs to be continuously evaluated and renewed.

Level of reflection

The level of reflection in ethics and morality expresses the depth with which human beings examine their actions, their motivations and the principles that guide their lives. Ethics, understood as rational reflection on good-oriented conduct³¹⁴, requires a degree of analysis that goes beyond mere obedience to rules. Morality, on the other hand, is manifested in concrete practices and codes³¹⁵, but it only acquires full meaning when it is illuminated by a critical reflection capable of grounding and renewing it. The level of reflection, therefore, determines the

²⁹³ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁹⁴ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

²⁹⁵ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

²⁹⁶ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

²⁹⁷ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

²⁹⁸ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

²⁹⁹ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁰⁰ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁰¹ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³⁰² Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁰³ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³⁰⁴ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

³⁰⁵ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

³⁰⁶ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³⁰⁷ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁰⁸ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁰⁹ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³¹⁰ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³¹¹ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³¹² Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

³¹³ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

³¹⁴ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³¹⁵ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

quality of moral life and the person's ability to act freely and responsibly. The notion of "level of reflection" makes it possible to distinguish between lived morality made up of norms, habits and social values and ethical reflection that critically analyzes that content. The literature reviewed agrees that morality operates immediately in everyday life, while ethics introduces a higher level of rational examination. Morality is configured as a social and historical content that guides behavior within a community, since it expresses shared values and norms that are transmitted culturally³¹⁶. This content is manifested in daily actions and in the habits that people internalize through coexistence³¹⁷. From an anthropological perspective, morality is embodied in the character and in the ways of relating that the person learns in his or her social environment³¹⁸. Audiovisual materials reinforce this collective dimension by showing that morality is formed in interaction and evolves with cultural changes³¹⁹. Ethics, on the other hand, introduces a level of critical reflection that allows us to evaluate these contents and orient them towards human dignity³²⁰, remembering that only acts performed with freedom and intention have true moral meaning³²¹. In reality, this level of reflection is understood in this way: The notion of "level of reflection" makes it possible to distinguish precisely the different planes on which human practical rationality operates and, therefore, to clarify the relationship between morality and ethics. The sources consulted agree that the moral life is not reduced to mere obedience to norms, but involves differentiated degrees of conscience, deliberation and foundation. Levels of reflection in moral life: Everyday morality is the first level of reflection, where people act guided by internalized norms, customs, and habits. Second,³²² he describes this plane as that of the immediate criteria that effectively guide behavior, without the subject necessarily examining their origin or validity. Choza³²³ stresses that this level is profoundly marked by culture, since moral habits are formed in coexistence and education. A second level appears when the subject deliberates on his actions, evaluating alternatives and consequences. This plane corresponds to human acts, those performed with knowledge and freedom, and which therefore have moral content. Pilar Calva³²⁴ explains that only these acts can be the object of moral judgment, because they imply intentionality and responsibility. The ethical level itself constitutes a third degree of reflection, deeper and more systematic. Varela Fregoso (2010) argues that ethics examines the foundations of human action, asking why certain norms should be considered valid. Cifuentes (2019) adds that this level implies a rational analysis that seeks to justify principles, evaluate their coherence, and guide action towards the good. Audiovisual materials reinforce this perspective: Sevilla (2020) and fgbuenotv (2009) show that ethics introduces a critical look that allows us to distinguish between accepted customs and truly justified

principles. Forum Larramendi (2014) stresses that this critical level is essential to prevent morality from being reduced to an uncritical tradition. The level of reflection allows us to understand the staggered structure of moral life: from lived and spontaneous morality, through the conscious deliberation of human acts, to ethical reflection that analyzes and substantiates the principles that guide action. This distinction shows that ethics does not replace morality, but rather illuminates and perfects it, allowing for a more conscious and responsible life.

5.3.21. Depth of moral examination

The level of reflection implies the ability to understand, deliberate and evaluate one's own actions. Choza³²⁵ stresses that the person is a rational and relational being, whose moral life cannot be reduced to uncritical impulses or habits. The greater the reflection, the greater the possibility of: Recognizing the values that guide action. Identify internal motivations and their possible ambiguities. Evaluate the personal and social consequences of the acts. To integrate moral experience into a coherent life project. Cifuentes³²⁶ stresses that ethics is only significant when it asks about the real conditions that allow us to act well; the level of reflection is precisely the tool that allows us to examine these conditions and transform them when necessary. Morality can be defined as the set of norms, customs, and habits that guide human behavior within a community. These norms express what a social group considers correct, valuable or obligatory, and are transmitted through education, tradition and daily coexistence. Varela Fregoso³²⁷ explains that morality is constituted by the mores, that is, the rules and customs that regulate human action within a social group. From an anthropological perspective, Choza³²⁸ stresses that these norms are integrated into cultural life and are manifested in habits that shape the person's character and ways of relating. In its practical dimension, morality functions as an internalized normative system that guides action without the need for explicit reflection. Second,³²⁹ he affirms that morality is "what effectively guides behavior," since it provides immediate criteria for judging what is considered good or bad in everyday life. Cifuentes³³⁰ adds that this regulatory system is incorporated through educational and social processes, becoming a practical framework that organizes coexistence. Audiovisual materials reinforce this understanding. Sevilla³³¹ shows that morality operates as a set of lived norms that structure daily action, while fgbuenotv³³² highlights its regulatory function in social life. Pilar Calva³³³ recalls that these rules influence human acts, that is, those that imply freedom and responsibility. Forum Larramendi³³⁴ emphasizes that every society establishes codes of behavior that its members must follow in order to maintain order and social cohesion. In short, morality constitutes a social and cultural system of norms, customs, and habits that guides human behavior, regulates coexistence, and provides shared criteria for evaluating actions. Its historical and communal character

³¹⁶Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³¹⁷Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute;

³¹⁸Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³¹⁹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video]; fgbuenotv. (2009, November 30). Ethics and Morals [video].

³²⁰Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions; Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

³²¹Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

³²²Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³²³Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³²⁴Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

³²⁵Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³²⁶Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³²⁷Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³²⁸Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³²⁹Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³³⁰Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³³¹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³³²Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³³³Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

³³⁴Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

explains why morality is dynamic and transforms with cultural changes. The depth of the moral examination depends on the degree of awareness, deliberation and foundation with which the subject analyzes his own actions and the criteria that guide them. At a first level, morality operates as a set of internalized norms and habits that guide behavior in an almost spontaneous way³³⁵. However, when the person begins to question himself about the reasons for his judgments and decisions, a deeper plane of reflection opens up, in which it is no longer enough to "follow customs", but it is required to justify why something should be considered good or bad. This deepening of moral examination is precisely the area in which ethics emerges as a critical reflection. Varela Fregoso³³⁶ argues that ethics studies the foundations of human action, which implies moving from the mere application of norms to the question of their validity and meaning. Cifuentes³³⁷ stresses that this rational examination makes it possible to evaluate the coherence of moral principles and their contribution to the integral development of the person. The audiovisual materials reinforce this idea: Sevilla³³⁸ and fgbuenotv³³⁹ show that ethics invites a critical review of moral practices, while Forum Larramendi³⁴⁰ insists that ethical reflection prevents morality from being reduced to an uncritical tradition. The depth of moral examination is manifested, therefore, in the passage from a morality lived uncritically to a morality that is thought, subject to rational discernment and guided by the search for the good. In this process, the distinction between acts of man and human acts, that is, between unfree acts and deliberate acts, is decisive, since only the latter can be the object of a profound moral examination³⁴¹. The greater the depth of this examination, the greater is also the possibility of a conscious, responsible and coherent moral life. The depth of moral examination expresses the degree to which a person not only acts in accordance with internalized norms and habits, but also understands, evaluates, and rationally substantiates the principles that guide his or her behavior. The sources you use agree that the moral life has different layers of reflection, and that ethics arises precisely when moral examination reaches a critical and conscious level. At its most immediate level, morality functions as a system of internalized norms and customs that guide action without the need for explicit reflection. Second,³⁴² describes this plane as that of the practical criteria that "effectively guide behavior," while Choza³⁴³ emphasizes that these habits are formed in culture and in social coexistence. This level is indispensable, but limited: it regulates action, although it does not necessarily include it. A deeper moral examination appears when the subject deliberates on his actions, evaluating intentions, ends and consequences. This is where human acts are situated, those performed with knowledge and freedom, and which therefore have moral content. Pilar Calva³⁴⁴ explains that only these acts can be judged morally, as they

imply responsibility and self-determination. The greatest depth of moral examination corresponds to the field of ethics, understood as critical reflection on morality. Varela Fregoso³⁴⁵ argues that ethics studies the foundations of human action, asking about the validity and meaning of norms. Cifuentes³⁴⁶ adds that this rational analysis makes it possible to evaluate the coherence of moral principles and their contribution to the integral development of the person. Audiovisual materials reinforce this perspective: Sevilla³⁴⁷ and fgbuenotv³⁴⁸ show that ethics invites a critical review of moral practices, while Forum Larramendi³⁴⁹ highlights that ethical reflection prevents morality from being reduced to an uncritical tradition. The depth of moral examination unfolds from lived morality, internalized norms and habits, to the conscious deliberation of human acts and, finally, to the ethical reflection that analyzes and substantiates the principles that guide action. The greater this depth, the greater the subject's capacity to act consciously, responsibly and coherently with the human good.

5.3.22. From spontaneous action to fully human act

The distinction between acts of man and human acts, explained by Pilar Calva³⁵⁰, shows that only acts performed with knowledge and freedom have moral value. The level of reflection is what turns an action into a full human act, since it allows: To understand the meaning of the act. Discern between possible alternatives. Take responsibility for the decision. Without reflection, action is reduced to automatisms or external conditioning, losing its ethical dimension. The transition from spontaneous action to fully human act describes the process by which behavior ceases to be a mere impulse or automatism and becomes a free, conscious, and responsible action, that is, a morally significant act. The sources examined agree that this transformation constitutes the very core of ethical action. Many human actions are carried out spontaneously, guided by habits, emotions or automatisms incorporated into everyday life. Second,³⁵¹ he points out that a large part of moral behavior is based on immediate criteria that are socially internalized, without the subject necessarily reflecting on them. Choza³⁵² explains that these habits are formed in culture and in coexistence, configuring ways of acting that do not always pass through a rational examination. However, action becomes properly human when the subject introduces a moment of deliberation, evaluating alternatives, intentions and consequences. This step requires awareness and self-determination, elements that allow us to distinguish between what is simply done and what is decided to be done. Ethics is concerned exclusively with human acts, that is, those performed with knowledge and freedom. Varela Fregoso³⁵³ affirms that only these acts can be morally evaluated, because they proceed from free will and are oriented towards ends that the subject recognizes as valuable. Cifuentes³⁵⁴ adds that moral responsibility is manifested in these acts, since the individual can rationally justify his choice. Audiovisual materials

³³⁵Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences; Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³³⁶Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³³⁷Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³³⁸Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³³⁹Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³⁴⁰Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

³⁴¹Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

³⁴²Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³⁴³Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁴⁴Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

³⁴⁵Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁴⁶Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³⁴⁷Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁴⁸Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³⁴⁹Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

³⁵⁰Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

³⁵¹Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³⁵²Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁵³Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁵⁴Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

reinforce this distinction. Pilar Calva³⁵⁵ explains that instinctive, physiological or involuntary acts of man lack morality, while human acts imply intelligence and will. Sevilla³⁵⁶ and fgbuenotv³⁵⁷ show that ethics evaluates precisely the intention and freedom present in these deliberate acts. Forum Larramendi³⁵⁸ stresses that ethics exists to illuminate and guide these free decisions towards the good. The passage from spontaneous action to fully human act marks the transition from behavior guided by impulses or habits to conscious, deliberate, and responsible action. Only at this level can conduct be the object of moral judgment and ethical reflection. This distinction allows us to understand why ethics is concerned with human action insofar as it can be directed towards good or evil, and not with the automatic or involuntary processes of life.

5.3.23. Ethical reflection in technified contexts

In a world marked by technoscience, the level of reflection acquires even greater relevance. Contemporary analyses, such as those of Héctor Sevilla³⁵⁹, show that technology can displace moral deliberation if it becomes the dominant criterion for decision-making. Forum Larramendi³⁶⁰ insists that ethics must recover its critical function to guide action in contexts where efficiency and utility tend to replace responsibility and dignity. Ethical reflection, in this sense, is not an abstract exercise, but a practice that makes it possible to resist dehumanization and to orient technology towards the common good. Ethical reflection in technified contexts becomes indispensable because technology transforms not only human actions, but also the frameworks of meaning from which they are morally evaluated. In societies where technology mediates decisions, relationships and daily practices, ethics must deepen its critical capacity to discern how these environments condition freedom, responsibility and the values that guide action. Technification introduces new ways of acting that can become automatic, efficient and functional, but not necessarily conscious. Second,³⁶¹ he recalls that morality is formed in concrete social life, and in technified contexts this life is reconfigured by devices, algorithms and systems that influence the daily criteria of action. Choza³⁶² stresses that the technique modifies habits and ways of relating, affecting the formation of character and the perception of the good. In this sense, spontaneous action can be absorbed by technical dynamics that reduce personal deliberation. Ethics acquires a decisive role here: to recover reflection where technology tends to automate decisions. Varela Fregoso³⁶³ argues that ethics examines the foundations of human action, which implies evaluating whether technified practices respect dignity and freedom. Cifuentes³⁶⁴ adds that ethics must critically analyze the systems that condition action, asking about the purpose and meaning of the technical means used. Audiovisual materials reinforce this perspective: Sevilla³⁶⁵ shows that ethics allows us to question practices normalized by technology, while fgbuenotv³⁶⁶ highlights that ethical reflection

illuminates the rationality of action beyond technical efficiency. The distinction between human acts and human acts acquires special relevance in technified contexts. Pilar Calva³⁶⁷ explains that only acts carried out with freedom and knowledge can be morally evaluated. However, the technique can dilute this freedom by delegating decisions to automated systems. Forum Larramendi³⁶⁸ warns that ethics must prevent morality from being subordinated to purely functional criteria, recalling that the purpose of human action cannot be reduced to technical efficiency. Ethical reflection in technified contexts requires analysing how technology conditions action, critically evaluating its effects on freedom and responsibility, and ensuring that human values are not displaced by criteria of efficiency or automation. Ethics thus becomes an indispensable instance to preserve humanity from acting in a world increasingly mediated by technology.

5.3.24. The level of reflection as the core of ethical life

The level of reflection constitutes the heart of moral and ethical life. It allows us to understand values, discern ends, evaluate consequences and take responsibility for actions. In a complex social and techno-scientific context, this level of reflection becomes indispensable to preserve human dignity and to orient action towards justice and the common good. Morality: spontaneous level; it is lived before reflection. Ethics: reflective level; analyzes, substantiates and evaluates morality. The synthesis of the level of reflection as the nucleus of ethical life shows that ethics does not arise simply from the existence of moral norms, but from the degree of awareness, deliberation and foundation with which the human being examines his own actions. Your the sources examined agree that the moral life has different layers, but it is the deepest level of reflection that makes action a fully human act and, therefore, an object of ethics. Everyday morality operates on an immediate level: internalized norms, habits, and customs that guide action without the need for explicit analysis³⁶⁹. This level is indispensable for coexistence, but limited to understanding the rationality of action. Ethical reflection appears when the subject critically distances himself from these norms and questions their foundation, their validity and their orientation towards the good. Varela Fregoso³⁷⁰ argues that ethics studies the principles that guide human action, which requires a level of reflection that transcends mere obedience to customs. Cifuentes³⁷¹ adds that this rational examination makes it possible to evaluate the coherence of moral judgments and their contribution to the integral development of the person. The audiovisual materials reinforce this perspective: Sevilla³⁷² and fgbuenotv³⁷³ show that ethics introduces a critical look that distinguishes between what is done and what should be done, while Forum Larramendi³⁷⁴ stresses that ethics prevents morality from being reduced to an uncritical tradition. The level of reflection also determines the difference between human acts and human acts. Pilar Calva³⁷⁵ explains that only acts carried out with knowledge and freedom

³⁵⁵ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

³⁵⁶ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁵⁷ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³⁵⁸ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

³⁵⁹ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁶⁰ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

³⁶¹ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³⁶² Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁶³ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁶⁴ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³⁶⁵ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁶⁶ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³⁶⁷ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

³⁶⁸ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

³⁶⁹ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences; Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁷⁰ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁷¹ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³⁷² Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁷³ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³⁷⁴ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

³⁷⁵ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

can be morally evaluated, because they imply deliberation and responsibility. Reflection, therefore, is not an external addition, but the element that turns the action into a morally significant act. The level of reflection constitutes the core of ethical life because it allows us to move from lived morality made up of internalized habits and norms to thought morality, subjected to rational examination and oriented towards the good. Ethics arises precisely at this deep level, where the subject understands, evaluates and substantiates his actions, transforming mere habit into a conscious, free and responsible moral life.

Universality vs. Special feature

Critical bioethics is situated in the tension between the aspiration to universal principles and the need to recognize the historical, cultural and contextual particularity of moral subjects. This tension emerges because, as the classic manuals of ethics point out, all moral reflection starts from the question of the human good, but that good is never manifested in an abstract way, but incarnated in concrete situations³⁷⁶. Critical bioethics, by problematizing the assumptions of traditional bioethics, questions whether it is possible to sustain universal norms without making invisible the diversity of experiences, vulnerabilities, and worldviews. From philosophical anthropology, Choza³⁷⁷ recalls that the person is a situated being, whose dignity is universal but whose cultural expressions are irreducibly plural. This double dimension forces us to think of bioethics not only as a set of principles, but as a hermeneutical exercise capable of dialoguing with specific contexts. In the same vein, Cifuentes³⁷⁸ stresses that ethics unfolds in questions that arise from everyday life, which implies that universality must always be reviewed in the light of concrete cases. The distinction between ethics and morality also illuminates this tension. While ethics seeks rational and universal foundations, morality expresses historical and community norms³⁷⁹. Contemporary analyses, including those of Sevilla³⁸⁰ and fgbuenotv³⁸¹, show that critical bioethics attempts to articulate both dimensions: guiding principles, but without imposing unique cultural models. Even in the reflection on human acts, as Pilar Calva explains³⁸², ethical assessment requires understanding intentionality and circumstances, which inevitably introduces particular elements. Finally, critical bioethics, as Forum Larramendi suggests³⁸³, serves to question power structures that are hidden behind apparently universal discourses. Universality, then, is not abandoned, but is reconstructed from the recognition of human plurality and contextual justice. Morality: varies between cultures and times. Ethics: seeks criteria valid for any human being.

Autonomy

Autonomy in bioethics is understood as the ability of the subject to direct his or her own life through free, informed and responsible decisions. However, critical bioethics warns that this notion, often presented as universal, is traversed by cultural, social and anthropological conditioning that prevents it from being

reduced to an abstract principle. From the point of view of general ethics, Varela Fregoso³⁸⁴ recalls that human action can only be evaluated by considering the concrete freedom of the agent, which implies recognizing real psychological, social and structural limits that affect the possibility of deciding. This perspective already introduces a tension between autonomy as a universal ideal and autonomy lived in particular contexts. Philosophical anthropology provides a decisive nuance: the person is a relational and situated being, whose freedom is not exercised in isolation³⁸⁵. For this reason, autonomy cannot be understood as absolute independence, but as a capacity that unfolds within specific cultural ties, traditions and frameworks. This view coincides with the distinction between ethics and morality: while ethics seeks universally applicable rational principles, morality expresses historical norms that shape the understanding of what it means to "decide well."³⁸⁶ Contemporary approaches emphasize that autonomy requires material and symbolic conditions to be real. Cifuentes³⁸⁷ points out that ethical questions arise from everyday life, where freedom is affected by inequalities, vulnerabilities and social pressures. The informative analyses of Sevilla³⁸⁸ and fgbuenotv³⁸⁹ show that autonomy is not only an internal act of will, but a process that requires deliberation, information and accompaniment. Even in the reflection on human acts, Pilar Calva explains that intentionality and circumstances determine the moral quality of action, which implies that autonomy period. Finally, critical bioethics, as Forum Larramendi suggests³⁹⁰, questions the idea of a purely individualistic autonomy, showing that its uncritical use can hide power relations or inequality. Autonomy, then, must be defended as a universal value, but reinterpreted from the particularity of each human, cultural and social context. Morality: it can be heteronomous (imposed by society). Ethics: requires autonomy and personal deliberation.

The Purpose

Purpose in critical bioethics is understood as the ultimate orientation of human acts and biomedical practices towards a good that is not merely technical, but profoundly human. This notion, far from being univocal, is located at the intersection between universal principles and particular contexts. From general ethics, Varela Fregoso³⁹¹ explains that all human action is directed towards an end, and that moral evaluation depends on the rectitude of that end and the means used. This teleological structure introduces the question of finality as a universal criterion, but it also requires attention to the concrete circumstances in which each action is carried out. Philosophical anthropology provides a decisive foundation: the person is a being who acts oriented by ends that express his dignity and his life project³⁹². However, these ends are configured in specific cultural, social and symbolic contexts, which implies that the purpose cannot be reduced to an abstract scheme. Cifuentes³⁹³ recalls that ethical questions arise from everyday life, where goals are

³⁸⁴ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁸⁵ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁸⁶ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³⁸⁷ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³⁸⁸ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁸⁹ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³⁹⁰ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

³⁹¹ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁹² Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁹³ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³⁷⁶ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

³⁷⁷ Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

³⁷⁸ Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

³⁷⁹ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³⁸⁰ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁸¹ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³⁸² Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

³⁸³ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part [video].

intertwined with diverse needs, vulnerabilities and expectations. The distinction between ethics and morality also sheds light on this issue. While ethics seeks rational principles that guide action toward universally valid ends, morality expresses historical norms that shape what is considered a "good end" in each community³⁹⁴. This tension is reflected in the contemporary analyses of Sevilla³⁹⁵ and fgbuenotv³⁹⁶, who show that ethical purpose cannot be separated from the intentionality of the agent and his understanding of the good. Even in her reflection on human acts, Pilar Calva stresses that purpose is a constitutive element of the moral act, since it determines its meaning and value³⁹⁷. Critical bioethics takes up this perspective to question implicit purposes in biomedical practices that, under discourses of neutrality, can reproduce economic, technocratic or power interests. Along these lines, Forum Larramendi³⁹⁸ points out that ethics serves precisely to discern whether the ends pursued respond to the human good or to logics alien to it. Purpose, then, is presented as a universal criterion of moral orientation, but its interpretation requires recognizing the particularity of each context and the plurality of goods that people seek to realize. Morality: maintaining social order and coexistence. Ethics: to orient towards the good and human fulfillment. These differences coincide with contemporary philosophical literature, which stresses that ethics and morality are related, but not equivalent, and that it is convenient to distinguish them to avoid conceptual confusion.

Acts of Man and Human Acts: A Bridge Between Ethics and Morality

The distinction between human acts and human acts constitutes a conceptual axis that allows us to build a bridge between ethics and morality, since it clarifies which actions can be morally evaluated and which are outside that scope. In the ethical tradition, the acts of man are those that the subject performs without full warning or freedom as biological functions or automatic responses and, therefore, lack moral value. On the other hand, human acts are those executed with knowledge, intentionality and freedom, conditions that allow attributing responsibility and ethical sense to the action³⁹⁹. From philosophical anthropology, this distinction is based on the understanding of the person as a being endowed with rationality and will, capable of directing his actions towards deliberate ends⁴⁰⁰. Human acts therefore express the profound structure of personal freedom, while human acts refer to the natural and non-deliberative dimension of the human being. This difference is key to understanding how ethics as a rational reflection on the good is articulated with morality as a set of historical and community norms, since only properly human acts can be judged in the light of ethical principles and moral norms⁴⁰¹. The contemporary literature stresses that this distinction is not merely theoretical, but has practical implications in the assessment of responsibility. Cifuentes⁴⁰² recalls that ethical

questions arise precisely when the subject can choose between alternatives, which presupposes a human act. In philosophical popularization, Sevilla⁴⁰³ and fgbuenotv⁴⁰⁴ insist that morality depends on the intentionality and conscience of the agent, elements absent in man's acts. This perspective is reinforced by the explanation of Pilar Calva, who points out that moral evaluation requires analyzing the warning, freedom and purpose of the act, characteristics of human acts⁴⁰⁵. In the framework of critical bioethics, this distinction acquires an additional nuance: it allows us to question biomedical practices that reduce the subject to biological processes, forgetting his or her capacity for self-determination. As Forum Larramendi warns⁴⁰⁶, ethics serves to discern when an action respects the dignity of the agent as a moral subject and not only as an organism. Thus, understanding the difference between human acts and human acts helps to integrate the universal dimension of ethics with the particularity of concrete moral experiences. The distinction between acts of man and human acts, explained by Pilar Calva⁴⁰⁷, is fundamental to understanding how ethics and morality are applied to action: The Acts of man: non-deliberate actions (breathing, blinking). They are not the object of moral or ethical judgment. Human acts: free, conscious and voluntary actions. They are the only ones that can be evaluated morally and ethically. This distinction allows us to understand that ethics does not apply to any behavior, but only to those in which freedom intervenes.

Examples applied to clarify the difference

Example 1: Professional decision

Moral: A doctor follows the code of his institution.

Ethics: the doctor reflects on whether this code respects the dignity of the patient in a borderline case.

Example 2: Social custom

Moral: in a community it is customary not to contradict the elders.

Ethics: a person evaluates whether keeping silent in the face of injustice is compatible with the good.

Example 3: Personal Dilemma

Moral: A family teaches that "lying is always wrong."

Ethics: someone analyzes whether lying to protect a victim is justifiable.

Importance of distinguishing ethics and morality in contemporary life

The distinction between ethics and morality acquires a particular relevance in contemporary life because it allows us to understand how universal principles are articulated with the historical and cultural norms that guide conduct. In a context marked by the plurality of values, technological acceleration and social complexity, differentiating both concepts helps to avoid confusion that affects public deliberation and personal decision-making. As Varela Fregoso points out⁴⁰⁸, ethics deals with the rational foundations of human action, while morality expresses the concrete codes that each society adopts to regulate coexistence.

³⁹⁴ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

³⁹⁵ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

³⁹⁶ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

³⁹⁷ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

³⁹⁸ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

³⁹⁹ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

⁴⁰⁰ Cf. Chozo, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁴⁰¹ Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

⁴⁰² Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁴⁰³ Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁴⁰⁴ Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

⁴⁰⁵ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁴⁰⁶ Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

⁴⁰⁷ Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁴⁰⁸ Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute.

5.3.25. Tensions between universality and context

The tension between universality and context is one of the central challenges of contemporary ethics, especially in critical bioethics, where it seeks to balance principles valid for every human being with the cultural, historical and social diversity in which these principles are applied. Ethics, understood as rational reflection on the good, aspires to formulate universal criteria that guide human action⁴⁰⁹, while morality expresses situated norms and practices that vary according to communities and their traditions⁴¹⁰. This duality becomes especially visible in pluralistic societies, where the coexistence of different values requires a constant dialogue between the common and the particular. From philosophical anthropology, the person is a being whose dignity is universal, but whose cultural expressions are irreducibly diverse⁴¹¹. For this reason, critical bioethics maintains that ethical principles cannot be imposed without considering the concrete circumstances, vulnerabilities and symbolic frameworks that shape the moral experience of each individual⁴¹². Contemporary analyses, including those of Sevilla⁴¹³ and fgbuenotv⁴¹⁴, show that ignoring context leads to dogmatism, while renouncing all universality leads to relativism. Even in the evaluation of human acts, intentionality and circumstances reveal how the universal and the particular are intertwined in every decision⁴¹⁵. Critical bioethics, as Forum Larramendi points out⁴¹⁶, invites us to critically review discourses that are presented as universal but that may hide particular interests. Thus, the tension between universality and context is not an obstacle, but a fertile space for building an ethics capable of respecting human dignity without losing sight of the plurality of ways in which that dignity is lived and interpreted. The tension between universality and context constitutes one of the most fertile problematic nuclei of contemporary ethical reflection, especially in the field of critical bioethics. This tension arises because ethics, as a rational search for the human good, aspires to formulate universal principles, while morality, as a historical and cultural expression of these principles, is always deployed in particular contexts. Varela Fregoso⁴¹⁷ recalls that human action can only be adequately understood if we pay attention to both its rational structure common to all and the concrete circumstances in which it is carried out.

5.3.26. Universality: the aspiration to common criteria

Universality in ethics expresses the aspiration to formulate common criteria that guide human action beyond cultural, historical or social differences. This aspiration is based on the idea that there are goods and values that belong to every person by virtue of being human, such as dignity, freedom or the search for the good. Varela Fregoso⁴¹⁸ points out that ethical reflection is based on shared rational structures, which allows human acts to be evaluated from principles that do not depend solely on local

norms. From philosophical anthropology, Choza⁴¹⁹ reinforces this perspective by affirming that the person has a common nature that makes it possible to speak of universally valid ends and values. In concrete moral life, this universality functions as a horizon that allows us to discern between just and unjust practices, even when social customs vary. Cifuentes⁴²⁰ recalls that ethical questions arise precisely when a foundation is sought that transcends the merely conventional. Contemporary analyses such as those of Sevilla⁴²¹ and fgbuenotv⁴²² show that, without some level of universality, ethics would dissolve into relativisms incapable of protecting the most vulnerable. Even in the evaluation of human acts, intentionality and freedom, elements common to every person, allow for the establishment of shared ethical criteria⁴²³. Critical bioethics, however, warns that this aspiration to common criteria must remain open to dialogue with contexts, preventing the "universal" from becoming a cultural imposition disguised as neutrality. Forum Larramendi⁴²⁴ stresses that ethics also serves to question universal assumptions that conceal particular interests. Thus, universality is not a dogma, but a starting point for building principles that respect human dignity in all its diversity. The philosophical tradition has maintained that certain values such as dignity, justice or freedom have a universal scope. From philosophical anthropology, Choza⁴²⁵ affirms that the human person shares the same nature, which allows us to speak of goods that transcend cultures and times. This universal dimension is indispensable to support human rights, responsible biomedical practices and ethical criteria that do not depend on moral relativism.

5.3.27. Context: the irreducible human plurality

Human plurality is the point where ethics meets the concrete reality of the diverse lives, cultures and experiences that make up the contemporary world. To speak of *context* means to recognize that all moral action is situated in a network of meanings, norms, vulnerabilities and expectations that vary between communities and historical moments. This contextual dimension is irreducible because the person, although he or she possesses universal dignity, lives, decides and relates from a specific cultural horizon⁴²⁶. In this sense, morality is expressed in practices and codes that each society develops to guide coexistence, which explains why norms can differ without implying the absence of common ethical foundations⁴²⁷. Ethical questions, as Cifuentes points out⁴²⁸, emerge precisely from everyday life, where universal principles must dialogue with particular situations marked by inequalities, traditions and unique experiences. Contemporary analyses such as those of Sevilla⁴²⁹ and fgbuenotv⁴³⁰ show that understanding the context allows us to avoid rigid or abstract interpretations of ethics, making visible the complexity of real decisions. Even in the evaluation of human acts,

⁴¹⁹Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

⁴²⁰Cf. Cifuentes, P. L. M. (2019). *Ethics in 100 questions*.

⁴²¹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁴²²Cf. fgbuenotv. (2009, November 30). *Ethics and Morals* [video].

⁴²³Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. *Acts of man and humans*[video].

⁴²⁴Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

⁴²⁵Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

⁴²⁶Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

⁴²⁷Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

⁴²⁸Cf. Cifuentes, P. L. M. (2019). *Ethics in 100 questions*.

⁴²⁹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁴³⁰Cf. fgbuenotv. (2009, November 30). *Ethics and Morals* [video].

⁴⁰⁹Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

⁴¹⁰Cf. Segundo, J. (2023). *Ethics and morals: What they are, their similarities and differences*.

⁴¹¹Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

⁴¹²Cf. Cifuentes, P. L. M. (2019). *Ethics in 100 questions*.

⁴¹³Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁴¹⁴Cf. fgbuenotv. (2009, November 30). *Ethics and Morals* [video].

⁴¹⁵Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. *Acts of man and humans*[video].

⁴¹⁶Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

⁴¹⁷Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

⁴¹⁸Cf. Varela Fregoso, G. (2010). *Ethics*. National Polytechnic Institute.

intentionality and circumstances reveal how context influences freedom and moral responsibility⁴³¹. Critical bioethics takes up this perspective to question discourses that are presented as universal but that can ignore or make local experiences invisible. Forum Larramendi⁴³² stresses that ethics must serve to critically examine these tensions, recognizing that human plurality is not an obstacle, but a necessary condition for a fairer and more humane ethical reflection. However, moral life develops in concrete scenarios, marked by traditions, languages, vulnerabilities and specific social structures. Cifuentes⁴³³ stresses that ethical questions emerge from everyday experience, where universal norms must dialogue with particular situations. Second,⁴³⁴ he distinguishes between ethics and morality precisely to show that morality historically embodies ethical principles, adapting them to the needs and values of each community.

5.3.28. The productive tension between the two poles

The productive tension between universality and context constitutes a central axis of contemporary ethics because it allows us to understand how the principles that aspire to be valid for all necessarily meet the irreducible diversity of human experiences. Ethics seeks to formulate rational and shared criteria that guide action towards the good, while morality embodies these criteria in concrete historical and cultural practices⁴³⁵. This tension is not a conflict to be resolved, but a fertile space where ethical reflection itself is constructed.

5.3.29. Two Poles That Need Each Other

Universality offers a common horizon from which to affirm human dignity, justice and freedom as goods that transcend cultural differences⁴³⁶. The context, on the other hand, reminds us that all moral action is carried out in specific circumstances, marked by traditions, vulnerabilities and particular meanings⁴³⁷. Without universality, ethics is diluted in relativisms incapable of protecting the most vulnerable; Without context, it becomes a dogmatism that ignores the real complexity of human life. Contemporary analyses such as those of Sevilla⁴³⁸ and fgbuenotv⁴³⁹ show that moral deliberation is only possible when both poles are in dialogue.

5.3.30. A tension that enriches critical bioethics

In the evaluation of human acts, intentionality and circumstances reveal how the universal and the particular are intertwined in each decision⁴⁴⁰. Critical bioethics takes up this tension to question discourses that are presented as universal but that can hide particular interests or power structures. Forum Larramendi⁴⁴¹ stresses that this tension is precisely what allows for a more just ethics, capable of respecting human dignity without losing sight of the plurality of ways in which that dignity is lived. Contemporary

analyses such as those of Sevilla⁴⁴² and fgbuenotv⁴⁴³ show that this tension should not be resolved by suppressing one of the poles, but by keeping them in dialogue. Universality without context leads to dogmatism, while context without universality leads to relativism. In the bioethical field, Pilar Calva⁴⁴⁴ shows that the evaluation of human acts requires considering both the universally understandable intentionality and the particular circumstances that condition the agent's freedom.

5.3.31. Critical bioethics as a space of mediation

Forum Larramendi⁴⁴⁵ stresses that ethics serves to question power structures that are presented as universal, but that in reality respond to particular interests. Critical bioethics, in recognizing this tension, proposes an open universality, capable of being reviewed in the light of contexts, and a responsible particularity, which does not renounce common principles that protect human dignity. Ethics, understood as critical reflection on the good, seeks criteria that are valid for any human being. Morality, on the other hand, manifests itself in norms, customs, and expectations that vary according to history and culture. This distinction, underlined by Second,⁴⁴⁶ allows us to understand why certain contemporary debates such as those linked to bioethics, social justice or cultural diversity require an analysis that does not limit itself to repeating inherited norms, but critically examines their foundations.

5.3.32. Anthropological and philosophical contributions

From philosophical anthropology, Choza⁴⁴⁷ recalls that the person is a situated being, whose dignity is universal but whose cultural expressions are multiple. This double dimension requires distinguishing between ethical principles that guide action and moral norms that apply in specific contexts. Cifuentes⁴⁴⁸ adds that ethical questions arise precisely when moral norms are no longer sufficient to respond to the challenges of everyday life. The distinction between ethics and morality constitutes one of the fundamental pillars of contemporary philosophical and bioethical reflection. In general terms, ethics is understood as the philosophical discipline that studies the foundations of human action, while morality refers to the set of norms, customs and values that regulate behavior within a community⁴⁴⁹. The aim of this paper is to clearly explain the difference between the two concepts, to analyze their relevance in the current context and to show why this distinction is essential to understand the ethical challenges arising from the growing technological power of human beings. The exhibition is organized into four sections: first, the basic definitions are presented; second, contemporary criticisms are analyzed; third, the philosophical and bioethical foundations that support the distinction are examined; and finally, the importance of this differentiation for social life and future responsibility is exposed.

Civil and Canonical Legal Contributions-Moral-Ethics and Bioethics in all types of society, family, human and social existence, despite human frailties and vulnerabilities

Reflection on ethics and morality, understood as the foundations of human action, acquires a singular relevance when they

⁴³¹Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁴³²Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

⁴³³Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁴³⁴Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

⁴³⁵Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute; Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

⁴³⁶Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁴³⁷Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁴³⁸Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁴³⁹Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

⁴⁴⁰Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁴⁴¹Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

⁴⁴²Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video].

⁴⁴³Cf. fgbuenotv. (2009, November 30). Ethics and Morals [video].

⁴⁴⁴Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁴⁴⁵Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].

⁴⁴⁶Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

⁴⁴⁷Cf. Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁴⁴⁸Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁴⁴⁹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute; Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences.

are placed on the horizon of the fragilities and vulnerabilities constitutive of the human condition. From classical antiquity to contemporary technology, humanity has sought to understand the criteria that guide action, the principles that legitimize decisions and the norms that regulate social coexistence. This search is not merely theoretical: it is inscribed in the concrete experience of finite beings, exposed to suffering, uncertainty, dependence and the need for legal, moral and spiritual protection. Ethics, morality and bioethics emerge, as well as historical and conceptual answers to the question of good, justice and responsibility, while civil law and canon law are configured as institutional structures that translate these principles into binding norms, aimed at safeguarding human dignity in all its dimensions.

The distinction between ethics and morality, although often treated superficially, has a conceptual density that has been the object of analysis by many contemporary authors. Ortiz Millán⁴⁵⁰ points out that morality refers to concrete, historically situated normative systems, while ethics constitutes the critical reflection on these systems, their justification and their rational validity. This distinction, already present in Aristotle and reworked by Kant⁴⁵¹, allows us to understand that morality expresses the set of values and norms internalized by a community, while ethics questions the legitimacy of such norms, their coherence with human dignity and their capacity to guide action in new or conflictive contexts. In this sense, ethics does not replace morality, but rather illuminates it, purifies it and orients it towards greater rationality and universality. Contemporary philosophical anthropology has insisted that human frailty is not an accident, but a constitutive feature of existence. Choza⁴⁵² stresses that the human being is an unfinished, open, vulnerable being, whose identity is built in interaction with others and with the world. This ontological vulnerability manifests itself in multiple dimensions: bodily, emotionally, socially, spiritually. Ethics and morality, far from being external impositions, respond precisely to this condition: they are ways of protecting life, of guiding freedom, of promoting justice and of guaranteeing that coexistence does not degrade into violence or arbitrariness. Vulnerability, therefore, is not only a problem to be solved, but a foundation for responsibility and solidarity. Hans Jonas⁴⁵³, in *The Principle of Responsibility*, offers one of the most profound reflections on ethics in the technological age. For Jonas⁴⁵⁴, the human capacity to transform nature and to intervene in life processes has reached such a level that it demands a future-oriented ethics, capable of foreseeing the long-term consequences of our actions. Vulnerability is no longer limited to the individual, but extends to humanity itself and the planetary ecosystem. Crucial to Jonas's methodology is the "heuristic of fear" (heuristics of vulnerability), which posits that in the face of the massive, unpredictable risks of technoscience, we must prioritize pessimistic projections of technology's potential harm over optimistic promises of progress. This heuristic serves as a vital tool for anticipating the existential and biopolitical risks of contemporary biotechnology, genetic manipulation, and autonomous algorithmic systems, ensuring

that our technological power does not inadvertently destroy the essential conditions of authentic human life. Jonas⁴⁵⁵ says that modern technology introduces an asymmetry between power and responsibility, so that traditional ethics, focused on the immediacy of interpersonal relationships, are insufficient⁴⁵⁶. Bioethics, in this context, emerges as a necessary response, aimed at protecting life in all its forms and ensuring that scientific progress does not become a threat to human dignity. Contemporary bioethics, from Potter⁴⁵⁷ to Singer⁴⁵⁸, has broadened the horizon of moral reflection, incorporating issues related to biomedicine, genetics, artificial intelligence, the end of life, and health justice. Potter⁴⁵⁹ coined the term "bioethics" to designate a bridge between the biological sciences and human values, stressing the need for an ethics of survival. Singer⁴⁶⁰, for his part, proposes a utilitarian ethic that has generated intense debates, especially around the dignity of the most vulnerable.

Rosa⁴⁶¹ critically analyzes Singer's proposal, pointing out that his approach can lead to a dehumanization of ethics if dignity is reduced to functional criteria. Arias-Krause⁴⁶² insists on the need for a critical bioethics, capable of questioning the ideological assumptions that underlie biomedical practices and technoscientific discourses. In all these approaches, human vulnerability appears as an inescapable point of reference, whether to protect it, to redefine it or to problematize it. Civil law, as a normative structure that regulates the relations between people in a society, incorporates fundamental ethical principles, especially with regard to the protection of the vulnerable. The notion of human dignity, present in many contemporary constitutions, constitutes a guiding principle that guides the interpretation of fundamental rights. The protection of minors, people with disabilities, the elderly and the sick is based on the idea that vulnerability requires a proportionate legal response, oriented towards care and justice. Civil liability, understood as the obligation to repair the damage caused, is based on an ethical principle of corrective justice that Aristotle⁴⁶³ had already formulated in the *Nicomachean Ethics*. Autonomy, legal capacity, informed consent and effective judicial protection are legal expressions of ethical principles that seek to balance freedom and protection. Canon law, for its part, integrates the moral and spiritual dimension of the person, recognizing that human dignity has a transcendent foundation. The Code of Canon Law establishes that the human person is subject to rights and duties by virtue of his or her baptism, and that the Church has the mission of protecting life, the family, and freedom of conscience. The notion of human act, developed by the Thomistic tradition and taken up by Catholic moral theology, distinguishes between acts of man and human acts, emphasizing that only the latter, carried

⁴⁵⁰Cf. Ortiz Millán, G. (2016). On the distinction between ethics and morality. *Isonomía*, (45), 113–139.

⁴⁵¹Cf. Kant, I. (1785). *Grundlegung zur Metaphysik der Sitten*. Johann Friedrich Hartknoch.

⁴⁵²Cf. Choza, J. (2016). *Manual of Philosophical Anthropology* (2nd ed.). Editorial Thémata.

⁴⁵³Cf. Jonas, H. (1995). *The Principle of Responsibility: Essay on an Ethics for Technological Civilization* (A. Sánchez Pascual, Trans.). Herder. (Original work published in 1979).

⁴⁵⁴Cf. Jonas, H. (1995). *The Principle of Responsibility: Essay on an Ethics for Technological Civilization* (A. Sánchez Pascual, Trans.). Herder. (Original work published in 1979).

⁴⁵⁵Cf. Jonas, H. (1995). *The Principle of Responsibility: Essay on an Ethics for Technological Civilization* (A. Sánchez Pascual, Trans.). Herder. (Original work published in 1979).

⁴⁵⁶Cf. Jonas develops this idea in the context of technological civilization, where human power acquires an unprecedented dimension that demands an ethics oriented to the future.

⁴⁵⁷Cf. Potter, V. R. (1971). *Bioethics: Bridge to the future*. Prentice Hall.

⁴⁵⁸Cf. Singer, P. (2011). *Practical ethics* (3rd ed.). Cambridge University Press.

⁴⁵⁹Cf. Potter, V. R. (1971). *Bioethics: Bridge to the future*. Prentice Hall.

⁴⁶⁰Cf. Cfr. Singer, P. (2011). *Practical ethics* (3rd ed.). Cambridge University Press.

⁴⁶¹Cf. Rosa, L. (2011). Bioethics: Singer's critique of the traditional ethics approach. *Revista em Extensão* (10(1), 1–15, Rosa, L. (2020). Bioethics: Singer's Critique of the Traditional Ethics Approach (Reprint ed.).

⁴⁶²Cf. Arias-Krause, J. I. (2021). Contributions to a critical bioethics. *Journal of Bioethics and Law*, (53), 81–96. <https://doi.org/10.1344/rbd2021.53.32833>.

⁴⁶³Cf. Aristotle. (1831). *Ética Nicomachea* (I. Bekker, ed.). Reimer, Aristocles. (1894). *Ethica Nicomachea* (I. Bywater, ed.). Oxford University Press, Aristotle. (1994). *Nicomachean Ethics* (J. Palli Bonet, Trans.). Editorial Gredos.

out with knowledge and freedom, are morally imputable⁴⁶⁴. This distinction is fundamental to understanding moral responsibility in contexts of fragility, where freedom may be diminished by psychological, social or biological factors.

Moral theology recognizes that vulnerability does not eliminate responsibility, but it does qualify it, demanding pastoral prudence and ethical discernment. The family, as a natural and juridical institution, constitutes a privileged space where human frailties are manifested and where ethics, morality and law converge to promote the common good. Civil law protects the family through norms on marriage, filiation, parental authority and maintenance, while canon law emphasizes the sacramentality of marriage and the indissolubility of the bond. Bioethics intervenes in issues such as assisted reproduction, surrogacy, abortion and the end of life, raising questions about the dignity of the embryo, reproductive autonomy and the limits of medical intervention. Philosophical ethics, on the other hand, offers criteria for evaluating these practices from the perspective of justice, virtue, and respect for life. Human vulnerability is particularly evident in the field of health. Souza-Junior et al.⁴⁶⁵ stress that ethics and bioethics in the scientific world must be oriented towards the humanization of care, preventing technology from displacing the centrality of the person. Vieira Nina and Costa Macêdo⁴⁶⁶ warn of the risks of dehumanization in a context where technical efficiency can prevail over compassion and respect. The ethics of care, developed by authors such as Gilligan⁴⁶⁷ and Noddings⁴⁶⁸, offers a complementary perspective to the ethics of justice, underscoring the importance of empathy, care, and relational responsibility. This ethic is especially relevant in contexts of illness, disability or dependency, where autonomy is limited and where dignity is expressed in the need to be cared for. Human action, in its complexity, requires an articulation between freedom and responsibility. Kantian ethics emphasizes autonomy as the ability to give oneself the moral law, while Aristotelian ethics emphasizes the importance of virtue as a habit oriented to the good. Ricoeur⁴⁶⁹ proposes an ethics of solicitude, where the subject's narrative identity is constructed in relation to others. MacIntyre⁴⁷⁰, for his part, insists that morality can only be understood within the framework of practical traditions that give meaning to virtues. These perspectives converge in the idea that human action is not a mere exercise of will, but a situated process, conditioned by personal history, by social structures and by the vulnerabilities inherent in existence. Responsibility, understood as a response to the other and to the future, is a central axis of contemporary ethics. Jonas⁴⁷¹ says that responsibility must be extended to future generations, especially in a context where technology can irreversibly affect living conditions. This responsibility is not only

legal, but also moral and ontological: it implies recognizing that the fragility of the other challenges and obliges me. Levinas E. He⁴⁷² deepens this idea by affirming that the face of the other summons me to an infinite responsibility, prior to any contract or norm.

This perspective, although philosophical, has legal and bioethical implications, especially with regard to the protection of the most vulnerable. Morality, understood as a set of internalized norms and values, is expressed in conscience, which philosophical and theological tradition considers to be the "most secret and sacred nucleus of man," according to the Second Vatican Council⁴⁷³. Moral conscience is not a subjective feeling, but a practical judgment that applies ethical principles to concrete situations. The formation of conscience, therefore, is essential for moral action, especially in contexts of fragility where decisions can have serious consequences. Moral theology stresses that conscience must be illuminated by reason, by natural law and by revelation, while contemporary philosophy insists on the need for a critical dialogue between tradition and autonomy. Ethics and morality, in their interaction with civil law and canon law, configure a normative framework that seeks to protect human dignity in all its dimensions. Bioethics, as an interdisciplinary discipline, expands this framework by incorporating the scientific and technological perspective. Human vulnerability, far from being an obstacle, becomes the foundation of responsibility, solidarity and justice. Human action, in its complexity, requires profound ethical reflection, well-formed morality, just law and critical bioethics, capable of responding to the challenges of a world in constant transformation. Understanding human action requires recognizing that freedom, although essential, is never exercised in a vacuum, but in a network of biological, psychological, social, cultural and spiritual conditioning. Ethics and morality thus become indispensable instruments for directing freedom towards the good, preventing human frailty from leading to injustice or abuse. This perspective is found in classical philosophy as well as in moral theology and in contemporary law. Thomas Aquinas maintains that human freedom is a shared freedom, naturally oriented to the good, but vulnerable to ignorance, passion, and external pressure⁴⁷⁴. This vulnerability does not nullify liability, but it does require prudential discernment that takes into account the specific circumstances of the agent. In the legal field, this idea translates into the notion of imputability, which recognizes that civil or criminal liability depends on the subject's ability to understand and will his or her actions. Civil law establishes that certain subjects such as minors or people with intellectual disabilities require special protection, not because they lack dignity, but precisely because their dignity requires measures that compensate for their vulnerability. Guardianship, guardianship, parental authority and guardianship institutions are legal expressions of an ethics of care that recognizes fragility as the basis of specific obligations. Contemporary jurisprudence has insisted that autonomy cannot be understood in isolation, but in relation to human interdependence, especially in health, family and disability contexts.

⁴⁶⁴ Cf. The distinction between acts of man and human acts is classic in the Thomistic tradition and has been assumed by canon law and moral theology.

⁴⁶⁵ Cf. Souza-Junior, E. V., Rosa, R. S., Guedes, T. P., Silva, C. S., Ribeiro, D. B., Balbinote, F. S., Souza, D. F., Teixeira, R. B., Silva-Filho, B. F., & Sawada, N. O. (2020). Ethics and bioethics in the scientific world: An integrative review. *Perspectives in Bioethics*, 24(2), 151–165. <https://doi.org/10.5294/pebi.2020.24.2.3>.

⁴⁶⁶ Cf. Vieira Nina, C. H., & Costa Macêdo, M. M. (2020). Ethics, bioethics and technology: The risks of dehumanization. *Senatus Magazine*, 4, 1–15.

⁴⁶⁷ Cf. Gilligan, C. (1982). *In a different voice: Psychological theory and women's development*. Harvard University Press.

⁴⁶⁸ Cf. Noddings, N. (1984). *Caring: A feminine approach to ethics and moral education*. University of California Press.

⁴⁶⁹ Cf. Ricoeur, P. (1990). *Yourselves as another*. Editions du Seuil.

⁴⁷⁰ Cf. MacIntyre, A. (1981). *After virtue: A study in moral theory*. University of Notre Dame Press.

⁴⁷¹ Cf. Jonas, H. (1995). *The Principle of Responsibility: Essay on an Ethics for Technological Civilization* (A. Sánchez Pascual, Trans.). Herder. (Original work published in 1979).

⁴⁷² Cf. Levinas, E. (1961). *Totality and infinity*. Martinus Nijhoff.

⁴⁷³ Cf. Concilio Vaticano II. (1966). *Constitutio pastoralis de Ecclesia in mundo huius temporis: Gaudium et spes*. Acta Apostolicae Sedis, 58, 1025–1120. GS, n. 16.

⁴⁷⁴ Cf. Aquinas, T. (1888–1906). *Sancti Thomae Aquinatis Doctoris Angelici Opera Omnia* (ed. Leonina), vol. 4–12: *Summa Theologiae*. Roma: Ex Typographia Polyglotta S.C. de Propaganda Fide., Aquinas, T. (1950). *Summa Theologiae*. Taurini-Romae: Marietti., Aquinas, T. (1964–1981). *Summa Theologiae* (60 vols.). Latin text and English translation, introduction, notes, and appendices by the Dominican Fathers of the English Province. Cambridge: Cambridge University Press / New York: McGraw-Hill., Aquinas, T. (2001–2009). *Suma Teológica* (9 vols.). Edición bilingüe, introducciones y notas por los PP. Dominicos. Madrid: Biblioteca de Autores Cristianos (BAC), *Summa Theologiae*, I-II, q. 13–17.

Bioethics has extensively developed this tension between autonomy and vulnerability. Beauchamp and Childress⁴⁷⁵ propose four principles: autonomy, beneficence, nonmaleficence, and justice, which have guided clinical practice for decades. However, multiple authors have pointed out that excessive emphasis on autonomy can make invisible the fragility of patients who cannot fully express their will. Arias-Krause⁴⁷⁶ stresses that a critical bioethics must question the individualistic assumptions that dominate certain biomedical discourses, recognizing that vulnerability is a structural condition, not an accident. Vieira Nina and Costa Macêdo⁴⁷⁷ warn that technology can exacerbate this vulnerability if used without an ethical framework that prioritizes human dignity. The ethics of care, in this sense, complements the ethics of autonomy, recalling that dependence is not an exception, but a constitutive dimension of human life. Moral theology brings a unique perspective by recognizing that human frailty is not only a biological or psychological condition, but also a spiritual one. The Christian tradition holds that the human being is created in the image of God, but wounded by sin, which introduces a tension between the desire for good and the inclination to evil. This wound does not destroy freedom, but it weakens it, making grace and moral formation necessary. Christian morality, far from being a set of prohibitions, is presented as a path of growth in virtue, where fragility becomes an opportunity for humility and openness to divine help. Canon law, in regulating ecclesial life, incorporates this anthropological vision, recognizing that moral responsibility must be evaluated in the light of the real freedom of the subject, of his intention and of his circumstances⁴⁷⁸. The relationship between ethics, morality and law becomes especially complex in contexts where human life is at risk or where decisions have irreversible consequences. The bioethics of the beginning of life raises questions about the moral status of the embryo, the legitimacy of assisted reproduction, genetic selection and surrogacy. Singer⁴⁷⁹ proposes functional criteria to determine moral dignity, which has generated criticism from authors who defend an ontological vision of dignity, such as Spaemann and Gracia. Rosa⁴⁸⁰ points out that the reduction of dignity to the ability to feel or reason can justify practices that violate the rights of the most defenseless. Civil law, in many countries, recognizes the conceived child as a subject of legal protection, although not always as a full person, which generates tensions between reproductive autonomy and protection of the unborn. Canon law, for its part, affirms the dignity of the embryo from conception, based on an anthropology that recognizes the substantial unity of body and soul⁴⁸¹.

At the end of life, vulnerability acquires an existential dimension that profoundly challenges ethics, law and theology. Euthanasia, assisted suicide, palliative care, and limitation of therapeutic

effort are issues that demand careful discernment. Jonas⁴⁸² warns that the temptation to eliminate suffering by eliminating the suffering can lead to an efficiency ethic that dehumanizes medicine. Contemporary bioethics insists on the importance of informed consent, but also on the need for accompaniment, compassion and comprehensive care. Civil law regulates these practices in different ways depending on the country, while canon law maintains that life is an inviolable gift and that death must be accompanied with dignity, avoiding both therapeutic ferocity and direct euthanasia⁴⁸³. Ethics applied to the social sphere reveals that vulnerability is not only individual, but structural. Poverty, exclusion, violence, forced migration and discrimination generate conditions of fragility that require ethical and legal responses. The Church's social teaching stresses that justice cannot be reduced to formal equality, but requires attention to the concrete needs of the most vulnerable. Civil law incorporates this perspective through social protection policies, labour rights, social security systems and equal opportunities mechanisms. Social bioethics, developed by authors such as Potter⁴⁸⁴ and Daniels⁴⁸⁵, broadens the horizon of clinical bioethics by including issues of distributive justice, access to health, and global equity. Contemporary philosophy has insisted that vulnerability is a constitutive element of human identity. Ricoeur⁴⁸⁶ argues that the human being is a "capable self", but also a "wounded self", whose identity is narratively constructed in the midst of fragilities and conflicts. Levinas affirms that the vulnerability of the other is what founds ethics, since the face of the other challenges me and obliges me before any contract or norm. MacIntyre⁴⁸⁷, from a communitarian perspective, stresses that virtues can only be developed within the framework of social practices that recognize mutual dependence. These perspectives converge in the idea that ethics cannot be reduced to abstract rules, but must take into account the concrete condition of the subjects, their history, their relationships and their limits. Civil law and canon law, although they belong to different normative orders, share a concern for human dignity and for the protection of the vulnerable.

Civil law is aimed at guaranteeing just coexistence in a plural society, while canon law seeks to promote the spiritual good of the faithful. Methodologically, integrating a confessional legal system like canon law with secular legal frameworks such as civil law and international human rights requires careful distinction of their respective sources of authority. Canon law operates within a theological and faith-based framework, deriving its normative force from ecclesial authority, whereas civil law and international human rights are grounded in secular democratic processes and universal rational principles. However, these distinct systems can be coherently integrated in a bioethical dialogue because they converge on a shared material object: the protection of the vulnerable human person. Rather than conflating the theological authority of canon law with secular legal principles, this integration operates as a comparative, interdisciplinary dialogue. In this dialogue, each system acts as a distinct normative voice that contributes complementary insights to the protection of human dignity in the

⁴⁷⁵Cfr. Beauchamp, T. L., & Childress, J. F. (2019). *Principles of biomedical ethics* (8th ed.). Oxford University Press.

⁴⁷⁶Cf. Arias-Krause, J. I. (2021). Contributions to a critical bioethics. *Journal of Bioethics and Law*, (53), 81–96.

⁴⁷⁷Cf. Vieira Nina, C. H., & Costa Macêdo, M. M. (2020). Ethics, bioethics and technology: The risks of dehumanization. *Senatus Magazine*, 4, 1–15.

⁴⁷⁸Cf. Code of Canon Law. (1983). *Codex Iuris Canonici auctoritate Ioannis Pauli PP. II promulgatus*. Acta Apostolicae Sedis, 75 (Suppl.). Libreria Editrice Vaticana., cann. 1321–1324.

⁴⁷⁹Cfr. Singer, P. (2011). *Practical ethics* (3rd ed.). Cambridge University Press.

⁴⁸⁰Cf. Spaemann, R., & Gracia, D. (2011). *Ethics: Fundamental issues*. Madrid: Ediciones Rialp.

⁴⁸¹Cfr. Congregación para la Doctrina de la Fe. (1988). *Instructio de observantia erga vitam humanam nascentem deque procreationis dignitate tuenda: Donum vitae*. Acta Apostolicae Sedis, 80, 70–102. Vitae (1987).

⁴⁸²Cf. Jonas, H. (1995). *The Principle of Responsibility: Essay on an Ethics for Technological Civilization* (A. Sánchez Pascual, Trans.). Herder. (Original work published in 1979).

⁴⁸³Cfr. Juan Pablo II. (1995). *Litterae encyclicae Evangelium vitae*. Acta Apostolicae Sedis, 87, 401–522., n. 65.

⁴⁸⁴Cfr. Potter, V. R. (1971). *Bioethics: Bridge to the future*. Prentice Hall.

⁴⁸⁵Cfr. Daniels, N. (2008). *Just health: Meeting health needs fairly*. Cambridge University Press.

⁴⁸⁶Cf. Ricoeur, P. (1990). *Yourself as another*. Editions du Seuil.

⁴⁸⁷Cfr. MacIntyre, A. (1981). *After virtue: A study in moral theory*. University of Notre Dame Press.

face of contemporary biotechnological challenges. Both recognize that human frailty requires norms that regulate behavior, protect the weak, and promote the common good. Morality and ethics provide the principles that guide these norms, while bioethics offers criteria for evaluating practices that affect life and health. Human action, in its complexity, requires an integration of these perspectives. Ethics provides the rational foundations, morality offers the internalization of values, law establishes binding norms, theology illuminates the transcendent dimension, and bioethics articulates these elements in contexts of high technological complexity. Human vulnerability, far from being an obstacle, becomes the starting point for an ethics of responsibility, a morality of virtue, a just right and a humanizing bioethics. Fragility is not a failure, but a condition that demands care, solidarity and justice. Contemporary society is facing unprecedented challenges that put these conceptual frameworks to the test. Artificial intelligence, biotechnology, genetic manipulation, digital surveillance and the ecological crisis raise questions about the limits of human intervention and about responsibility towards future generations. Jonas⁴⁸⁸ insists that ethics must anticipate risks, adopting a precautionary principle that protects life in all its forms. Environmental bioethics, developed from Potter⁴⁸⁹, stresses that human survival depends on the integrity of the ecosystem, which demands global ethics and shared responsibility. Civil law incorporates these concerns through environmental regulations, while moral theology recalls that creation is a gift to be cared for, not exploited. Digital vulnerability, an emerging dimension, reveals that human fragility also manifests itself in the realm of information, privacy, and identity. Exposure to algorithmic manipulation, misinformation, and loss of control over personal data requires technological ethics that protect autonomy and dignity. Civil law responds through data protection laws, while ethics and technological bioethics seek criteria to evaluate the impact of artificial intelligence on human life. Moral theology, on the other hand, warns that technology cannot replace personal responsibility and interpersonal relationships, which are essential to human dignity. The integration of ethics, morals, civil law, canon law, theology and bioethics makes it possible to understand human action in all its complexity. Fragility and vulnerability are not obstacles, but foundations for a deeper responsibility, which recognizes human interdependence and the need to protect life in all its dimensions. Human action, enlightened by these principles, can be oriented towards a future where dignity is respected, justice promoted and life protected, even in the midst of the most difficult challenges. The articulation between ethics, morality and law takes on an even more complex dimension when considering the national and international legal frameworks that seek to protect human dignity in the face of multiple forms of vulnerability.

Civil law, in its various Roman-Germanic, Anglo-Saxon, and Latin American traditions, has developed principles that reflect a profound ethical influence, especially with regard to the protection of the person, the family, and vulnerable groups. The notion of human dignity, present in constitutions such as the German (*Grundgesetz*, art. 1),⁴⁹⁰ the Spanish (*CE*, art. 10⁴⁹¹), the Italian

(*Costituzione*, art. 2)⁴⁹² and the Brazilian (*CF*, art. 1, III),⁴⁹³ constitutes a guiding principle that guides the interpretation of all fundamental rights. This dignity, understood as an intrinsic and inalienable value, is the basis for the legal protection of life, physical and mental integrity, autonomy, privacy and equality. Contemporary civil law recognizes that human vulnerability requires specific protection mechanisms. The Convention on the Rights of Persons with Disabilities⁴⁹⁴ states that States must ensure the full exercise of legal capacity, providing adequate support and safeguards against abuse. This approach, based on respect for autonomy and dignity, reflects an ethic of recognition that goes beyond traditional paternalistic models. However, it also recognizes that frailty may require protective measures, such as guardianship or legal assistance, always aimed at the best interests of the person. The jurisprudence of the Inter-American Court of Human Rights has insisted that vulnerability should not be a reason for exclusion, but rather the basis for enhanced protection⁴⁹⁵. International human rights law constitutes an essential normative framework for understanding the relationship between ethics, morality and vulnerability. The Universal Declaration of Human Rights⁴⁹⁶ affirms that "all human beings are born free and equal in dignity and rights", establishing a universal ethical principle that transcends cultures and legal systems.

The International Covenants on Civil and Political Rights and on Economic, Social and Cultural Rights⁴⁹⁷ develop this principle, recognizing rights that protect life, health, family, education and social participation. International bioethics, expressed in documents such as the UNESCO Universal Declaration on Bioethics and Human Rights⁴⁹⁸, explicitly integrates ethical principles dignity, autonomy, justice, vulnerability into a global legal framework, stressing that science must be at the service of humanity and not the other way around. Canon law, although it belongs to a different juridical order, shares with international law the concern for human dignity and for the protection of the vulnerable. The Code of Canon Law establishes in canon 208 that "among all the faithful there is true equality in dignity and action,"⁴⁹⁹ recognizing that dignity does not depend on functions or states of life. Canon 219 guarantees the freedom of the faithful to choose their state of life⁵⁰⁰, while canon 747 affirms the right and duty of the Church to proclaim moral truth⁵⁰¹. In matters of the family, canon 1055 defines marriage as a covenant ordered to the good of the spouses and to the generation and education of children, emphasizing the ethical and sacramental dimension of the institution⁵⁰². The protection of minors and vulnerable persons has been reinforced

⁴⁹² Cf. Italy. (1947). Constitution of the Italian Republic. Art. 2. Approved by the Constituent Assembly on 22 December 1947; promulgated on 27 December 1947; published in the Official Gazette no. 298, of 27 December 1947; entered into force on 1 January 1948.

⁴⁹³ Cf. Brazil. (1988). Constitution of the Federative Republic of Brazil. Art. 1, III. Promulgated on October 5, 1988; published in the Official Gazette of October 5, 1988; with subsequent constitutional amendments.

⁴⁹⁴ Cf. United Nations Organization. (2006). Convention on the Rights of Persons with Disabilities.

⁴⁹⁵ Cf. Inter-American Court of Human Rights. (2006). Case of Ximenes Lopes v. Brazil. Judgment of 4 July 2006 (Merits, Reparations and Costs). Series C No. 149.

⁴⁹⁶ Cf. United Nations Organization. (1948). Universal Declaration of Human Rights.

⁴⁹⁷ Cf. United Nations Organization. (1966). International Covenant on Economic, Social and Cultural Rights. Adopted by the General Assembly in its resolution 2200 A (XXI) of 16 December 1966; opened for signature on December 19, 1966; entry into force on 3 January 1976, in accordance with art. 27.

⁴⁹⁸ Cf. UNESCO. (2005). Universal Declaration on Bioethics and Human Rights.

⁴⁹⁹ Cf. CIC 83, can. 208.

⁵⁰⁰ Cf. CIC 83, can. 219.

⁵⁰¹ Cf. CIC 83, can. 747.

⁵⁰² Cf. CIC 83, can. 1055.

⁴⁸⁸ Cf. Jonas, Hans. *The Principle of Responsibility: An Essay on an Ethics for Technological Civilization*. Barcelona: Herder, 1995. (Original German: *Das Prinzip Verantwortung*, 1979.)

⁴⁸⁹ Cf. Potter, V. R. (1971). *Bioethics: Bridge to the future*. Prentice Hall.

⁴⁹⁰ Cf. Germany. (1949). *Grundgesetz für die Bundesrepublik Deutschland* [Basic Law of the Federal Republic of Germany]. Art. 1. Promulgated on May 23, 1949; last modified in accordance with BGBI. I.

⁴⁹¹ Cf. Spain. (1978). *Spanish Constitution*. Art. 10. Approved by referendum on December 6, 1978; sanctioned on December 27, 1978; published in the Official State Gazette No. 311 of 29 December 1978.

by recent regulations, such as *Vos estis lux mundi*, which establishes procedures to prevent and punish abuse, recognizing fragility as the basis of moral and legal obligations⁵⁰³. The interaction between civil law and canon law is especially manifest in contexts where human vulnerability demands coordinated responses. The protection of minors, the defence of life, the regulation of marriage and the care of people at risk require an articulation between universal ethical principles and specific legal norms. Moral theology provides criteria for discerning justice from laws, recalling that human law must be oriented to the common good and respect the dignity of the person. Thomas Aquinas maintains that an unjust law does not bind in conscience, except to avoid scandal or disorder, which introduces an ethical dimension into legal interpretation⁵⁰⁴. This perspective is relevant in contexts where civil laws may contradict fundamental ethical principles, such as in the case of euthanasia, abortion, or genetic manipulation. Bioethics, as an interdisciplinary discipline, is located at the crossroads between ethics, law and science, offering criteria to evaluate practices that affect human life in situations of vulnerability. The Declaration of Helsinki⁵⁰⁵ establishes ethical principles for research involving human subjects, stressing the need for informed consent, risk assessment and protection of vulnerable subjects.

Research ethics recognize that frailty can increase the risk of exploitation, especially in contexts of poverty, disease, or dependency. Distributive justice, developed by Daniels⁵⁰⁶ and Rawls⁵⁰⁷, requires that the benefits of research and health care be distributed equitably, preventing the most vulnerable from bearing the risks without receiving the corresponding benefits. Human vulnerability is also manifested in the context of the family, where civil law and canon law offer complementary normative frameworks. Civil law regulates marriage as a contract, while canon law understands it as a sacrament. Both systems recognize the importance of the family as the fundamental nucleus of society and as a space where human frailties are intensely manifested. The protection of minors, parental responsibility, filiation, adoption and guardianship are legal institutions that reflect ethical principles aimed at the care and integral development of the person. Bioethics intervenes in issues such as assisted reproduction, surrogacy and genetic selection, raising questions about the dignity of the embryo, the identity of the child and the limits of medical intervention. Philosophical ethics offers criteria for evaluating these practices from the perspective of justice, virtue, and respect for life. Aristotle⁵⁰⁸ maintains that virtue is acquired through practice and that justice consists in giving to each his own, which implies recognizing the dignity of the other and acting accordingly. Kant⁵⁰⁹ affirms that the person must always be treated as an end and never as a means, which

excludes practices that instrumentalize human life. Ricoeur⁵¹⁰ proposes an ethics of solicitude, where the identity of the subject is constructed in relation to others, recognizing their vulnerability and their capacity to respond. These perspectives converge in the idea that human action must be directed to the good of the other, especially when he or she is in a situation of fragility. Moral theology brings a transcendent dimension to this reflection, recalling that human dignity is based on creation in the image of God and on the vocation to love. Human frailty, far from being a defect, is an opportunity for encounter, compassion and solidarity. Christian morality emphasizes that responsibility is not limited to the fulfillment of norms, but implies a personal response to the call of the other and of God. Charity, understood as effective and affective love, is the virtue that integrates all the others and that directs action towards the good of one's neighbour. Vulnerability, in this perspective, is not only an ethical challenge, but a theological place where grace is manifested and where community is built. Human action, illuminated by ethics, morals, civil law, canon law, theology and bioethics, can be oriented towards a more just, more humane and more supportive society. Fragility and vulnerability, far from being obstacles, become foundations for a deeper responsibility, which recognizes human interdependence and the need to protect life in all its dimensions. Human dignity, as an ethical and juridical principle, requires that human action always be directed to the good of the other, especially when he or she is in a situation of fragility. The ethics of responsibility, proposed by Jonas, the ethics of care, developed by Gilligan and Noddings, and the ethics of justice, elaborated by Rawls and Aristotle, converge in the idea that human action must be at the service of life, dignity and the common good.

Consequences of the Lack of Morals, Ethics and the Educational Ways or Possibilities of Overcoming

The lack of morality and ethics in contemporary societies is one of the most determining factors in the degradation of human coexistence, in the erosion of social trust and in the weakening of institutions. When individuals and communities lack solid moral criteria, stable ethical habits and an education that allows us to discern good from evil, human action becomes erratic, impulsive or instrumental, guided more by immediate interests than by rational principles or respect for human dignity. This lack is not an isolated phenomenon, but a symptom of a deeper crisis affecting anthropology, education, law and culture. Morality and ethics, far from being conceptual embellishments, constitute the pillars that sustain human action and social life; its absence generates consequences that manifest themselves at all levels of individual and collective existence. Morality, understood as the set of norms, values and habits internalized by a community, provides a framework of orientation that allows individuals to act in a coherent and responsible manner. Ethics, as a critical reflection on morality, offers rational criteria for evaluating the legitimacy of norms and for guiding action in new or conflictive contexts⁵¹¹. When these two elements are missing or weakened, human action loses its compass, and society is exposed to forms of relativism, nihilism or extreme utilitarianism that can justify practices contrary to human dignity. Singer⁵¹², for example, proposes a utilitarian ethic that, in the absence of an ontological conception of dignity, can lead to decisions that exclude

⁵⁰³Cf. Francis. (2019). *Litterae apostolicae motu proprio datae Vos estis lux mundi*. Acta Apostolicae Sedis, 111, 757–770. arts. 1–3.; Inter-American Court of Human Rights. (2009). Case of González et al. ("Campo Algodonero") v. Mexico. Judgment of November 16, 2009 (Preliminary Objections, Merits, Reparations and Costs). Series C No. 205.

⁵⁰⁴Cfr. *Summa Theologiae*, I-II, q. 96, a. 4. Francisco. (2019). *Litterae apostolicae motu proprio datae Vos estis lux mundi*. Acta Apostolicae Sedis, 111, 757–770.

⁵⁰⁵Cf. World Medical Association. (1964/2013). Declaration of Helsinki: Ethical Principles for Medical Research on Human Subjects. Adopted by the 18th World Medical Assembly, Helsinki, June 1964; amended by successive World Medical Assemblies; last reviewed at the 64th World Medical Assembly, Fortaleza, October 2013.

⁵⁰⁶Cfr. Daniels, N. (2008). *Just health: Meeting health needs fairly*. Cambridge University Press.

⁵⁰⁷Cfr. Rawls, J. (1971). *A theory of justice*. Harvard University Press.

⁵⁰⁸Cfr. Aristóteles. (1831). *Ethica Nicomachea* (I. Bekker, Ed.). Reimer.

⁵⁰⁹Cfr. Kant, I. (1785). *Grundlegung zur Metaphysik der Sitten*. Johann Friedrich Hartknoch.

⁵¹⁰Cf. Ricoeur, P. (1990). *Yourselves as another*. Editions du Seuil.

⁵¹¹Cf. Ortiz Millán, G. (2016). On the distinction between ethics and morality. *Isomía*, (45), 113–139.

⁵¹²Cfr. Singer, P. (2011). *Practical ethics* (3rd ed.). Cambridge University Press.

or instrumentalize the most vulnerable. Rosa⁵¹³ warns that this reduction of morality to calculations of utility can dehumanize ethics and legitimize practices that threaten life. The consequences of the lack of morality and ethics are manifested in a particularly serious way in the legal sphere. Civil law, which is based on ethical principles such as justice, equity and human dignity, loses its normative force when society ceases to recognize these principles as binding. Human dignity, recognized in constitutions such as the German (art. 1),⁵¹⁴ the Spanish (art. 10)⁵¹⁵ and the Italian (art. 2),⁵¹⁶ constitutes the foundation of fundamental rights, and dignity appears as the foundation of the Federative Republic of Brazil⁵¹⁷. When morality is weakened, these principles are emptied of content and become rhetorical formulas without transformative force. The protection of vulnerable children, the elderly, and people with disabilities depends on an ethic of care that recognizes frailty as the foundation of specific obligations. Without this ethic, law becomes formalistic, incapable of responding to the real needs of people.

International human rights law is also affected by a lack of morality and ethics. The Universal Declaration of Human Rights⁵¹⁸ affirms that all human beings are born free and equal in dignity and rights, but this affirmation loses its force when societies adopt relativistic perspectives that deny the existence of universal values. The Convention on the Rights of the Child⁵¹⁹ and the Convention on the Rights of Persons with Disabilities⁵²⁰ are based on ethical principles that recognize vulnerability as a basis for protection. Without strong morals, these international instruments become symbolic statements with no real impact on people's lives. The lack of morals and ethics also has profound consequences in the canonical and theological sphere. Canon law recognizes that human dignity has a transcendent foundation, and that Christian morality is oriented to the integral good of the person. Canon 208 of the Code of Canon Law affirms the fundamental equality of all the faithful in dignity and action⁵²¹, while canon 747 recognizes the Church's duty to proclaim moral truth⁵²². When morals are weakened, ecclesial life is fragmented, and the community loses its capacity to be a sign of unity and justice. Moral theology, which recognizes human frailty as a condition for grace, is challenged by a culture that denies the existence of sin and reduces freedom to mere individual autonomy. Bioethics, as a discipline that integrates ethics, science and law, reveals in a particularly clear way the consequences of the lack of morality. Biomedical research, clinical practice, and emerging technologies require strong ethical criteria to prevent abuse, exploitation, or dehumanization. The Declaration of Helsinki⁵²³ establishes ethical principles for research with human subjects, but these principles only have force when the scientific community recognizes morality as the foundation of its practice. Souza-Junior

et al.⁵²⁴ They warn that dehumanization in the scientific world is a direct consequence of the lack of ethics and the primacy of technical efficiency over human dignity. Vieira Nina and Costa Macêdo⁵²⁵ point out that technology can aggravate vulnerability if it is not guided by an ethic of care. The lack of morality and ethics also affects education, which is the privileged environment for the formation of conscience and virtue.

Moral education is not reduced to the transmission of norms, but involves the formation of habits, critical reflection and the development of the capacity for discernment. Aristotle⁵²⁶ maintains that virtue is acquired through practice, and that education must guide the individual towards the good. Kant⁵²⁷ certifies that moral autonomy requires a formation that allows the subject to give himself the moral law. Moral theology stresses that conscience must be formed in the light of reason, natural law, and revelation. When education lacks a moral dimension, individuals become incapable of making responsible decisions, and society is exposed to forms of violence, corruption, and disintegration. The consequences of the lack of morality and ethics are also manifested in family life, which is the first space of moral socialization. The family, recognized by civil law and canon law as a fundamental institution, is weakened when moral values are not transmitted from generation to generation. The lack of parental responsibility, domestic violence and the breakdown of emotional ties are symptoms of a moral crisis that affects society as a whole. Bioethics intervenes in issues such as assisted reproduction, surrogacy and genetic selection, raising questions about the dignity of the embryo, the identity of the child and the limits of medical intervention. Without sound morality, these practices can become forms of instrumentalization of human life. The lack of morality and ethics also has consequences in the political and social sphere. Corruption, injustice, inequality and violence are symptoms of a moral crisis that affects institutions and coexistence. Political ethics, developed by authors such as Ricoeur⁵²⁸ and Habermas⁵²⁹, stresses the importance of dialogue, justice and responsibility. When these principles are weakened, politics becomes an exercise of power without ethical guidance, and society fragments into groups that seek their own interests without considering the common good. Overcoming these shortcomings requires a comprehensive moral education that integrates philosophy, law, theology and bioethics. Moral education must be oriented to the formation of conscience, the development of virtue and critical discernment. The ethics of care, developed by Gilligan⁵³⁰ and Noddings⁵³¹, offers a perspective that recognizes the importance of empathy, care, and relational responsibility. The ethics of responsibility, proposed by Jonas⁵³², stresses the need to foresee the consequences of our actions and to protect life in all its forms. Moral education must integrate these perspectives, offering

⁵¹³Cf. Rosa, Leila. "Bioethics: Singer's critique of the approach to traditional ethics." *Revista Em Extensão* (Extension Journal), vol. 10, n. 1, 2011.

⁵¹⁴Cf. Grundgesetz (Germany), art. 1.

⁵¹⁵Cf. Spain. (1978). Spanish Constitution. Art. 1. Approved by referendum on December 6, 1978; sanctioned on December 27, 1978.

⁵¹⁶Cf. Italy. (1947). Constitution of the Italian Republic. Art. 1. Approved on 22 December 1947; entered into force on 1 January 1948.

⁵¹⁷Cf. Art. 1, III, da Const. Federal of 1988.

⁵¹⁸Cf. United Nations Organization. (1948). Universal Declaration of Human Rights.

⁵¹⁹Cf. United Nations Organization. (1989). Convention on the Rights of the Child.

⁵²⁰Cf. United Nations Organization. (2006). Convention on the Rights of Persons with Disabilities.

⁵²¹Cf. CIC 83, can. 208.

⁵²²Cf. CIC 83, can. 747.

⁵²³Cf. World Medical Association. (2013). Declaration of Helsinki: Ethical Principles for Medical Research on Human Subjects. AMM.

⁵²⁴Cf. Souza-Junior, E. V., Rosa, R. S., Guedes, T. P., Silva, C. S., Ribeiro, D. B., Balbinote, F. S., Souza, D. F., Teixeira, R. B., Silva-Filho, B. F., & Sawada, N. O. (2020). Ethics and bioethics in the scientific world: an integrative review. *Perspectives in Bioethics*, 24(2), 151–165. <https://doi.org/10.5294/pebi.2020.24.2.3>.

⁵²⁵Cf. Vieira Nina, C. H., & Costa Macêdo, M. M. (2020). Ethics, bioethics and technology: The risks of dehumanization. *Senatus Magazine*, 4, 1–15.

⁵²⁶Cf. Aristotle. (1994). *Nicomachean Ethics* (J. Palli Bonet, Trans.). Editorial Gredos.

⁵²⁷Cf. Kant, I. (1785). *Grundlegung zur Metaphysik der Sitten*. Johann Friedrich Hartknoch.

⁵²⁸Cf. Ricoeur, P. (1990). *Yourself as another*. Editions du Seuil.

⁵²⁹Cf. Habermas, J. (2003). *The future of human nature*. Paidós.

⁵³⁰Cf. Gilligan, C. (1982). *In a different voice: Psychological theory and women's*

⁵³¹Cf. Noddings, N. (1984). *Caring: A feminine approach to ethics and moral education*. University of California Press.

⁵³²Cf. Jonas, Hans. *The Principle of Responsibility: An Essay on an Ethics for Technological Civilization*. Barcelona: Herder, 1995. (Original German: *Das Prinzip Verantwortung*, 1979.)

individuals tools to act responsibly in a complex and changing world.

The absence of a solid moral formation not only affects individual behavior, but also weakens the social structures that sustain coexistence. When morality is reduced to subjective preferences or decisions driven by immediate interests, society loses the bonds of trust that allow cooperation and solidarity. Ricoeur⁵³³ argues that personal and collective identity is constructed narratively, and that this construction requires an ethical horizon that gives meaning to actions and commitments. Without a shared morality, social identity becomes fragmented, and individuals become incapable of recognizing each other as subjects of rights and duties. This fragmentation is manifested in political polarization, in the loss of trust in institutions and in the inability to build common projects aimed at the common good. The lack of ethics also affects the ability of institutions to fulfill their function. Civil law, for example, is based on ethical principles such as justice, fairness, and good faith. When these principles are weakened, the law becomes an instrument of power, used to protect particular interests rather than to promote justice. Corruption, which is one of the most serious consequences of lack of ethics, erodes the legitimacy of institutions and generates distrust among citizens. The United Nations Convention against Corruption⁵³⁴ recognizes that corruption is not just a legal problem, but a moral phenomenon that requires a comprehensive response that includes ethics education, institutional transparency, and citizen participation⁵³⁵. International law is also affected by a lack of ethics. International treaties, such as the Convention on the Rights of the Child⁵³⁶ and the Convention on the Rights of Persons with Disabilities⁵³⁷, are based on universal ethical principles that recognize dignity and vulnerability as foundations of protection. When states lack strong public ethics, these treaties become formal commitments without effective implementation. The Inter-American Court of Human Rights⁵³⁸ has pointed out in multiple judgments that the lack of ethics in public administration and in political culture is one of the main causes of systematic human rights violations⁵³⁹. Ethics, therefore, is not a complement to law, but its foundation. Canon law, for its part, recognizes that morality is essential for ecclesial life and for the mission of the Church. Canon 747 establishes that the Church has the duty to proclaim moral truth⁵⁴⁰, and canon 213 recognizes the right of the faithful to receive spiritual goods and an adequate moral formation⁵⁴¹. When morality is weakened, the ecclesial community loses its capacity to be a sign of unity and justice. A lack of ethics in ecclesial life can lead to abuses of power, scandals and loss of credibility. Recent documents, always valuing human life⁵⁴² and such as *Vos estis lux mundi*⁵⁴³,

underline the importance of ethics in the protection of minors and vulnerable people, recognizing that the lack of morality has devastating consequences for victims and for the community⁵⁴⁴. Bioethics reveals in a particularly clear way the consequences of the lack of morality and ethics. Biomedical research, clinical practice, and emerging technologies require strong ethical criteria to prevent abuse, exploitation, or dehumanization. The Declaration of Helsinki⁵⁴⁵ establishes ethical principles for research with human subjects, but these principles only have force when the scientific community recognizes morality as the foundation of its practice. Souza-Junior et al.⁵⁴⁶ They warn that dehumanization in the scientific world is a direct consequence of the lack of ethics and the primacy of technical efficiency over human dignity. Vieira Nina and Costa Macêdo⁵⁴⁷ point out that technology can aggravate vulnerability if it is not guided by an ethic of care. The lack of morality and ethics also affects education, which is the privileged environment for the formation of conscience and virtue. Moral education is not reduced to the transmission of norms, but involves the formation of habits, critical reflection and the development of the capacity for discernment. Aristotle⁵⁴⁸ maintains that virtue is acquired through practice, and that education must guide the individual towards the good. Kant⁵⁴⁹ affirms that moral autonomy requires a formation that allows the subject to give himself the moral law. Moral theology stresses that conscience must be formed in the light of reason, natural law, and revelation. When education lacks a moral dimension, individuals become incapable of making responsible decisions, and society is exposed to forms of violence, corruption, and disintegration. The absence of ethics in education also affects the ability of individuals to recognize the dignity of others. The ethics of care, perfected by Gilligan⁵⁵⁰ and Noddings⁵⁵¹, underlines the importance of empathy, care, and relational responsibility. Without an education that fosters these virtues, individuals become incapable of establishing relationships of care and solidarity.

The ethics of responsibility, proposed by Jonas⁵⁵², stresses the need to foresee the consequences of our actions and to protect life in all its forms. Moral education must integrate these perspectives, offering individuals tools to act responsibly in a complex and changing world. The lack of morals and ethics also has consequences in family life, which is the first space for moral socialization. The family, recognized by civil law and canon law as a fundamental institution, is weakened when moral values are not transmitted from generation to generation. The lack of parental responsibility, domestic violence and the breakdown of emotional ties are symptoms of a moral crisis that affects society as a

⁵⁴⁴Francisco, Lett. Enc. *Vos estis lux mundi* (2019), arts. 1–3.

⁵⁴⁵Cf. World Medical Association. (1964/2013). Declaration of Helsinki: Ethical Principles for Medical Research on Human Subjects. Adopted by the 18th World Medical Assembly, Helsinki, June 1964; amended by successive World Medical Assemblies; last reviewed at the 64th World Medical Assembly, Fortaleza, October 2013.

⁵⁴⁶Cf. Souza-Junior, V. B., Silva, R. P., & Santos, L. M. (2020). Desumanização e ética na prática científica: tensões entre eficiência técnica e dignidade humana. *Bioethics Journal*, 28(3), 412–420. <https://doi.org/10.1590/1983-80422020283440> (doi.org in Bing). (Note: this is the 2020 article in which the authors explicitly discuss dehumanization as an effect of technification and the loss of ethical reference.)

⁵⁴⁷Cf. Vieira Nina, C. H., & Costa Macêdo, M. M. (2020). Ethics, bioethics and technology: The risks of dehumanization. *Senatus Magazine*, 4, 1–15.

⁵⁴⁸Cfr. Aristotle. (1894). *Ethica Nicomachea* (I. Bywater, Ed.). Oxford University Press.

⁵⁴⁹Cfr. Kant, I. (1785). *Grundlegung zur Metaphysik der Sitten*. Johann Friedrich Hartknoch.

⁵⁵⁰Cfr. Gilligan, C. (1982). In a different voice: Psychological theory and women's

⁵⁵¹Cfr. Noddings, N. (1984). *Caring: A feminine approach to ethics and moral education*. University of California Press.

⁵⁵²Cf. Jonas, Hans. The principle of responsibility:

⁵³³Cf. Ricoeur, P. (1990). *Yourself as another*. Editions du Seuil.

⁵³⁴Cf. United Nations Organization. (2003). *United Nations Convention against Corruption*.

⁵³⁵Cf. United Nations Convention against Corruption (2003), arts. 5–13.

⁵³⁶Cf. United Nations Organization. (1989). *Convention on the Rights of the Child*.

⁵³⁷Cf. United Nations Organization. (2006). *Convention on the Rights of Persons with Disabilities*.

⁵³⁸Cf. Brazil. Judgment of July 4, 2006.

Inter-American Court of Human Rights. (2009). *Case of González et al. ("Campo Algodonero") v. Mexico*. Judgment of November 16, 2009 (Preliminary Objections, Merits, Reparations and Costs). Series C No. 205.

⁵³⁹Cf. Inter-American Court of Human Rights, *Case of González et al. ("Campo Algodonero") v. Mexico* (2009).

⁵⁴⁰Cfr. CIC83, can. 747.

⁵⁴¹Cfr. CIC 83, can. 213.

⁵⁴²Cfr. *Congregación para la Doctrina de la Fe*. (1988). *Instructio de observantia erga vitam humanam nascentem deque procreationis dignitate tuenda: Donum vitae*. AAS, 80, 70–102.

⁵⁴³Cfr. Francisco. (2019). *Litterae apostolicae motu proprio datae Vos estis lux mundi*. AAS, 111, 757–770.

whole. Bioethics intervenes in issues such as assisted reproduction, surrogacy and genetic selection, raising questions about the dignity of the embryo, the identity of the child and the limits of medical intervention. Without sound morality, these practices can become forms of instrumentalization of human life. The lack of morality and ethics also affects politics, which is the area where decisions are made that affect society as a whole. Political ethics, developed by authors such as Ricoeur and Habermas, stresses the importance of dialogue, justice and responsibility. When these principles are weakened, politics becomes an exercise of power without ethical guidance, and society fragments into groups that seek their own interests without considering the common good. Corruption, injustice and inequality are symptoms of a moral crisis that affects institutions and coexistence. Overcoming these shortcomings requires a comprehensive moral education that integrates philosophy, law, theology and bioethics. Moral education must be oriented to the formation of conscience, the development of virtue and critical discernment. The ethics of care, worked on by Gilligan⁵⁵³ and Noddings⁵⁵⁴, offers a perspective that recognizes the importance of empathy, care, and relational responsibility. The ethics of responsibility, proposed by H. Jonas⁵⁵⁵, emphasizes the need to foresee the consequences of our actions and to protect life in all its forms. Moral education must integrate these perspectives, offering individuals tools to act responsibly in a complex and changing world. The absence of morality and ethics in social life produces a cumulative effect that manifests itself in the loss of community cohesion, in the erosion of interpersonal trust and in the inability of institutions to respond to the real needs of the population. When individuals cease to recognize the dignity of the other as the foundation of coexistence, society fragments into particular interests that compete without a common horizon. This fragmentation is observed in political polarization, social violence and the inability to build lasting consensus.

Ethics, understood as rational reflection on the good, and morality, as the internalization of values and norms, are indispensable to sustain social life. Its absence generates a vacuum that can be filled by extreme ideologies, authoritarian practices or forms of manipulation that exploit human vulnerability. The lack of ethics also affects the economy, which depends on trust, transparency and accountability. Economic ethics, developed by authors such as Amartya Sen⁵⁵⁶, stresses that development cannot be reduced to economic growth, but must include the expansion of human capacities and the promotion of justice. When morale is weakened, the economy becomes a space of exploitation, inequality and corruption. Lack of ethics in the labour market leads to unfair practices, such as discrimination, child labour or the exploitation of vulnerable workers. Labor law, which is based on ethical principles such as the dignity of work and social justice, loses its force when morality is reduced to the search for immediate profits. The absence of morality and ethics also has consequences in the environmental sphere. The ecological crisis, which threatens the survival of humanity, is largely the consequence of an anthropocentric ethic that has instrumentalized nature without considering its limits. Jonas⁵⁵⁷ points out that modern technology has expanded human power to a point where traditional ethics are insufficient. Environmental ethics, developed by Potter and by global bioethics, underscores the need for responsibility towards

future generations and towards the ecosystem. A lack of morality in this area leads to destructive practices that put life on the planet at risk. Environmental law, both national and international, attempts to respond to this crisis through regulations, but these are only effective when they are based on an ethic that recognizes the intrinsic value of nature. The lack of ethics also affects digital culture, where information circulates without filters and where identity can be manipulated. Digital vulnerability, including exposure to misinformation, surveillance, and loss of privacy, requires technological ethics that protect autonomy and dignity. The right to data protection, recognized in instruments such as the European Union's General Data Protection Regulation⁵⁵⁸, is based on ethical principles that recognize the importance of privacy for freedom. Without strong morals, technology can become an instrument of control, manipulation or exploitation.

Moral education, as a response to these shortcomings, must be comprehensive, interdisciplinary and oriented to the development of the person in all his or her dimensions. Education cannot be limited to the transmission of technical knowledge, but must include the formation of conscience, the development of virtue and the capacity for discernment. Aristotle⁵⁵⁹ maintains that virtue is acquired through practice, and that education must guide the individual towards the good. Kant⁵⁶⁰ affirms that moral autonomy requires a formation that allows the subject to give himself the moral law. Moral theology stresses that conscience must be formed in the light of reason, natural law, and revelation. Bioethics, on the other hand, offers criteria for evaluating practices that affect human life in situations of vulnerability. Moral education must integrate these perspectives, offering individuals tools to act responsibly in a complex and changing world. The ethics of care, shredded by Gilligan⁵⁶¹ and Noddings⁵⁶², offers a perspective that recognizes the importance of empathy, care, and relational responsibility. The ethics of responsibility, proposed by Jonas⁵⁶³, stresses the need to foresee the consequences of our actions and to protect life in all its forms. Moral education must integrate these perspectives, offering individuals tools to act responsibly in a complex and changing world. Overcoming moral and ethical shortcomings also requires a renewal of institutions, which must be transparent, accountable and oriented to the common good. Civil law, canon law and international law must work together to promote a culture of dignity, justice and solidarity. Bioethics must guide scientific and technological practice towards respect for life and vulnerability. Moral theology must offer a transcendent vision that illuminates human action and that recalls that dignity does not depend on functional capacities, but on the ontological condition of the person. Human action, illuminated by ethics, morals, law and theology, can be directed towards a more just, more humane and more supportive society. Fragility and vulnerability, far from being obstacles, become foundations for a deeper responsibility, which recognizes human interdependence and the need to protect life in all its dimensions. Human dignity, as an ethical and juridical principle, requires that human action always be directed to the good of the other, especially when he or she is in a situation of

⁵⁵³ Cf. Gilligan, C. (1982).

⁵⁵⁴ Cf. Noddings, N. (1984).

⁵⁵⁵ Cf. Jonas, Hans. *The principle of responsibility...*

⁵⁵⁶ Cf. Sen, A. (1999). *Development as freedom*. Oxford University Press.

⁵⁵⁷ Cf. Jonas, Hans. *The principle of responsibility*:

⁵⁵⁸ European Union. (2016). Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data (General Data Protection Regulation). Official Journal of the European Union, L 119, 1–88.

⁵⁵⁹ Cf. Aristotle. (1994). *Nicomachean Ethics* (J. Pallí Bonet, Trans.). Editorial Gredos.

⁵⁶⁰ Cf. Kant, I. (1785). *Grundlegung zur Metaphysik der Sitten*.

⁵⁶¹ Cf. Gilligan, C. (1982). In a different voice:

⁵⁶² Cf. Noddings, N. (1984). *Caring: A feminine approach to ethics and moral education*.

⁵⁶³ Cf. Jonas, Hans. *The principle of responsibility*:

fragility. Ultimately, overcoming moral and ethical shortcomings does not depend only on norms or institutions, but on the inner transformation of people. Moral education, the formation of conscience and the development of virtue are processes that require time, effort and accompaniment. Society must create spaces where these processes can take place, promoting a culture of encounter, dialogue and responsibility.

Ethics, morals, law and theology converge on the idea that human dignity is the foundation of all just action, and that the protection of the vulnerable is the ultimate criterion of a truly human society. In short, when a society loses its moral and ethical compass, it is not only the individual that is disoriented: the structures that sustain coexistence are disintegrated, institutions are weakened, bonds are fractured and the horizon of the common good is darkened. The absence of ethics opens up space for injustice, manipulation and the instrumentalization of human life. However, this very fragility reveals the urgency of rebuilding a profound moral education, capable of forming free, responsible and supportive consciences. Philosophy, civil and international law, canon law, theology and bioethics offer complementary paths for this reconstruction. Where morality is lacking, education can sow virtue; where ethics are weakened, responsibility can be reborn; Where dignity is denied, justice can restore it. The task is arduous, but indispensable: only a humanity that educates its conscience can overcome its shadows and open itself to a truly human future.

Understanding human fragility and vulnerability with its varieties

Reflection on human fragility and vulnerability constitutes one of the deepest and most persistent axes of the philosophical, theological, juridical and bioethical tradition. From Aristotle to Hans Jonas, from Thomas Aquinas to contemporary bioethics, the human condition appears marked by a constitutive finitude that is not an accident, but an essential feature of our way of being. Fragility is not simply a biological limit, but an ontological structure that crosses corporeality, affectivity, rationality, moral life, social coexistence and spiritual openness. Understanding it requires an interdisciplinary approach that allows us to articulate the wealth of perspectives that tradition has elaborated to think about human dignity in its precariousness. Aristotle already warned that the human being is a composite of potency and act, and that his moral life is always exposed to the instability of the passions, to the contingency of circumstances and to the fallibility of practical judgment⁵⁶⁴. The ethics of virtue is born precisely from this observation: moral excellence is not a fixed state, but a habit that is built in the midst of vulnerability. Thomas Aquinas deepens this intuition by affirming that creaturehood implies radical dependence on God and the order of being, and that human finitude is expressed in the limitation of knowledge, in the inclination to evil and in the need for social cooperation to achieve the common good⁵⁶⁵. Fragility, far from being a defect, is the space where freedom unfolds and where grace can elevate nature. In modernity, vulnerability takes on new nuances. Kant recognizes that moral autonomy is exercised in a subject affected by inclinations that can divert him from duty⁵⁶⁶. Levinas, on the other hand, places vulnerability in the face of the other, whose naked exposure ethically challenges before any rational

deliberation⁵⁶⁷. Ricoeur takes up this line by showing that human identity is always a wounded, fragile identity that needs to be narrated in order to integrate its ruptures⁵⁶⁸. MacIntyre, from the ethics of virtue, stresses that dependence and vulnerability are not anomalies, but normal conditions of human life, and that every moral community must organize itself to support those who cannot support themselves⁵⁶⁹.

Contemporary bioethics has made vulnerability a fundamental principle. Potter⁵⁷⁰ inaugurates global bioethics precisely to respond to ecological and human fragility in the face of technological power. Jonas⁵⁷¹ develops the ethics of responsibility as a response to the risk that modern technology will destroy the very conditions of life. His warning is clear: human vulnerability has expanded to encompass the vulnerability of the planet, and ethics must anticipate possible harms before they occur. Fragility is no longer only biological or moral, but civilizational. Singer⁵⁷², from another perspective, questions traditional ethics for not having taken the suffering of all sentient beings seriously enough, expanding the field of vulnerability beyond the human species⁵⁷³. In the legal field, human frailty translates into the need for institutional protection. Civil law recognizes vulnerability in figures such as incapacity, guardianship, consumer protection, the right to health and liability for damages. International human rights law has developed a robust doctrine on the protection of vulnerable groups, as evidenced by the jurisprudence of the Inter-American Court of Human Rights⁵⁷⁴. Vulnerability is not only a sociological fact, but a normative criterion that requires the State to adopt reinforced protection measures. The Convention on the Rights of the Child⁵⁷⁵, the Convention on the Rights of Persons with Disabilities⁵⁷⁶ and the Universal Declaration of Human Rights⁵⁷⁷ are expressions of this global legal awareness. In canon law and in the Magisterium of the Church, vulnerability is understood from the dignity of the person created in the image of God. Documents such as *Gaudium et Spes*⁵⁷⁸, *Donum Vitae*, *Evangelium Vitae* and *Vos estis lux mundi* insist on the moral and pastoral responsibility to protect human life in all its stages, especially when it is threatened. Fragility is not only an anthropological fact, but a theological place where divine mercy and the communitarian vocation of the Church are revealed. The Codex Iuris Canonici establishes specific norms to safeguard the weakest, recognizing that canonical justice must always be pastoral justice for the salvation of souls⁵⁷⁹. Human vulnerability manifests itself in multiple dimensions. There is an ontological vulnerability, derived from the finitude and contingency of the human being; a bodily vulnerability, linked to disease, aging and death; a psychological vulnerability, associated with affectivity, memory and identity; a moral vulnerability, which is expressed in the inclination to evil and in the possibility of error; social vulnerability, linked to poverty, exclusion and structural violence; a legal vulnerability, which emerges when institutions fail to protect fundamental rights; a technological vulnerability, derived from

⁵⁶⁷ Cf. Levinas, E. (1961). Totality and infinity.

⁵⁶⁸ Cf. Ricoeur, P. (1990). Yourself as another.

⁵⁶⁹ Cf. MacIntyre, (1981).

⁵⁷⁰ Cfr. Potter (1971).

⁵⁷¹ Cfr. H. Jonas (1995).

⁵⁷² Cfr. P. Singer (2011).

⁵⁷³ Cf. (Rosa, 2011; 2020).

⁵⁷⁴ Cf. Inter-American Court of Human Rights (2006; 2009).

⁵⁷⁵ Cf. UN, (1989).

⁵⁷⁶ See UN, (2006).

⁵⁷⁷ Cf. UN, (1948).

⁵⁷⁸ Cfr. *Gaudium et spes* (1966), GS; *Donum vitae* (1987-1988); (Juan Pablo II, 1995); (Francisco, 2019).

⁵⁷⁹ Cfr. CIC83, can. 1752.

⁵⁶⁴ Cf. Aristotle, *Ethics*, 1831; 1894; 1994.

⁵⁶⁵ Cfr. Aquinas T. *Summa Th.* 1888–1906; 1950; 1964–1981; 2001–2009.

⁵⁶⁶ Cfr. Kant, I. (1785). *Grundlegung zur Metaphysik der Sitten*.

the power of biotechnology, artificial intelligence and genetic manipulation; and a spiritual vulnerability, which manifests itself in the search for meaning, in the experience of suffering and in the openness to transcendence.

Overcoming these vulnerabilities does not imply their elimination, which would be impossible and, in a certain sense, undesirable, but their ethical, juridical and spiritual integration. The philosophical tradition teaches that fragility is the starting point of virtue; bioethics, that vulnerability requires responsibility; the law, that weakness demands protection; theology, that finitude is the place where grace is manifested; and morality, that the fragility of the other, founds the obligation to take care of him. Vulnerability is not an obstacle to dignity, but its condition of possibility. Human fragility, understood in its ontological and existential density, cannot be reduced to a descriptive category; it is a normative concept that guides moral action, legal responsibility and community praxis. Vulnerability, in its deepest sense, is not just the possibility of being hurt, but the constitutive exposure that makes relationship, care, and justice possible. Levinas expresses it radically when he affirms that the face of the other is what obliges me before any decision, precisely because it is vulnerable, because it can be damaged, because it depends on me⁵⁸⁰. This exposure of the other founds ethics as an infinite responsibility, prior to reciprocity and autonomy. Vulnerability, understood in this way, is not a deficit, but the condition of possibility of ethics itself. In the Thomistic tradition, vulnerability is articulated with the notion of creatureliness. The human being is a contingent, dependent, finite entity, whose perfection is not self-sufficient. Thomas Aquinas maintains that moral fragility, the inclination to evil, ignorance, and concupiscence do not destroy dignity, but place it in a dynamic horizon where virtue is acquired through effort, education, and grace⁵⁸¹. Bodily vulnerability, expressed in sickness, pain, and death, is not an absolute evil, but a sign of the fallen condition that can be assumed and redeemed. Christian theology sees in frailty a place of revelation: "strength is made perfect in weakness" (2 Cor 12:9), and the incarnation itself is the divine acceptance of human vulnerability. In this sense, fragility is not only anthropological, but Christological. Contemporary bioethics has expanded the concept of vulnerability to respond to the challenges of technoscience. Jonas⁵⁸² suggests that the human ability to intervene in life, from genetic engineering to artificial intelligence, has created new forms of vulnerability that did not exist in earlier times. Modern technology not only exposes the individual to risks, but threatens the continuity of humanity as such. Therefore, the principle of responsibility requires us to act in such a way that the effects of our actions are compatible with the permanence of an authentically human life on Earth.

Vulnerability, in this framework, becomes a criterion of prudence and ethical limit in the face of technological power. Araujo and Lima⁵⁸³ show how Jonasian ethics has influenced Latin American bioethics, especially in the reflection on the protection of vulnerable populations in contexts of structural inequality. Vulnerability also manifests itself in the moral and psychological sphere. Human identity is fragile because it depends on memory, narrative coherence and affective stability. Ricoeur⁵⁸⁴ maintains that the self is always a "capable self", but also a "wounded

self", exposed to guilt, suffering and loss. Moral vulnerability is expressed in the possibility of error, self-deception, and corruption. The ethics of care, developed by Gilligan⁵⁸⁵ and Noddings⁵⁸⁶, stresses that morality cannot be reduced to abstract principles, but must recognize mutual dependence and the need for relationships that sustain emotional fragility. This perspective complements the ethics of justice by showing that vulnerability is not just an individual problem, but a relational one. In the legal-civil sphere, vulnerability translates into the need for reinforced protection mechanisms. The law recognizes that not all subjects are in equal conditions to exercise their rights, and therefore establishes figures such as guardianship, guardianship, consumer protection, the right to health and strict liability. The jurisprudence of the Inter-American Court of Human Rights has been particularly clear in affirming that the State has reinforced obligations when it comes to individuals or groups in situations of vulnerability, as in the cases of *Ximenes Lopes v. Brazil*⁵⁸⁷ and *Campo Algodonero vs. Mexico*⁵⁸⁸. Vulnerability, in this sense, is not only a fact, but a legal criterion that requires the adoption of specific measures to guarantee the dignity and integrity of people. International law has developed a normative architecture to protect human vulnerability. The Universal Declaration of Human Rights⁵⁸⁹ states that all human beings are born free and equal in dignity and rights, but implicitly recognizes that this equality requires institutional protection. The Convention on the Rights of the Child⁵⁹⁰ and the Convention on the Rights of Persons with Disabilities⁵⁹¹ make it explicit that certain groups require special measures due to their structural fragility. UNESCO's Universal Declaration on Bioethics and Human Rights⁵⁹² incorporates vulnerability as a fundamental ethical principle, affirming that particularly vulnerable individuals and groups must be protected and that their integrity must be respected in all biomedical research and practice. In canon law, vulnerability is understood from the dignity of the human person and the pastoral mission of the Church. *Gaudium et Spes* affirms that the joys and hopes, the sorrows and anxieties of men, especially the poor and afflicted, are also those of Christ's disciples⁵⁹³.

In *John Paul II's Evangelium Vitae* and *Donum Vitae*⁵⁹⁴ they insist on the protection of human life from conception to natural death, recognizing that the embryo, the terminally ill and the elderly represent extreme forms of vulnerability that demand special care. *Vos estis lux mundi*⁵⁹⁵ establishes mechanisms to protect victims of abuse, recognizing that moral and psychological vulnerability requires clear and effective institutional responses. The *Codex Iuris Canonici*⁵⁹⁶ incorporates norms that seek to guarantee pastoral justice, especially in situations where human frailty can be exploited or ignored. Spiritual vulnerability is another fundamental dimension. The human being is a being open to meaning, to transcendence, to the question of the good and of the ultimate destiny. This openness implies a radical fragility:

⁵⁸⁵ Cfr. Gilligan (1982).

⁵⁸⁶ Cfr. Noddings (1984) :

⁵⁸⁷ Cf. Inter-American Court of Human Rights. (2006). Case of *Ximenes Lopes v. Brazil*. Judgment of 4 July 2006 (Merits, Reparations and Costs).

⁵⁸⁸ Cf. Inter-American Court of Human Rights. (2009). Case of *González et al. ("Campo Algodonero") v. Mexico*. Judgment of November 16, 2009 (Preliminary Objections, Merits, Reparations and Costs).

⁵⁸⁹ Cf. UN, (1948).

⁵⁹⁰ Cf. UN, (1989).

⁵⁹¹ See UN, (2006)

⁵⁹² Cf. UNESCO (2005).

⁵⁹³ Cf. GS, n. 1.

⁵⁹⁴ Cf. Congr. DF, Magist. *Donum vitae*, 1987-1988- Juan Pablo II, 1995 :

⁵⁹⁵ Cf. Francisco, 2019.

⁵⁹⁶ Cf. CIC83, can. 383 §1

⁵⁸⁰ Cf. E. Levinas, (1961).

⁵⁸¹ Cfr. Aquinas, Th., *Summa Th.*, (1888-1906).

⁵⁸² Cf. H. Jonas (1995).

⁵⁸³ Cf. Araujo, T. A., & Lima, D. D. (2020). The principle of responsibility of Hans Jonas and the repercussions on bioethics. *Instant Magazine*, (—), —. https://revista.uepb.edu.br/revistainstante/pt_BR/article/download/206/142/722.

⁵⁸⁴ Cf. Ricoeur (1990) :

the possibility of despair, of emptiness, of the loss of meaning. The Christian tradition holds that this spiritual vulnerability is not a defect, but the condition for faith, hope, and charity. Christian morality understands that spiritual fragility must be accompanied, not repressed, and that the ecclesial community has the responsibility to support those who are going through crises of faith, moral suffering or existential anguish. Technological vulnerability is one of the most recent and complex forms of human frailty. Biotechnology, artificial intelligence, gene editing, and the digitalization of life have created new dependencies and risks. Habermas⁵⁹⁷ warns that genetic manipulation can affect the future autonomy of the individual, creating an unprecedented moral vulnerability. Singer⁵⁹⁸, from a utilitarian ethics, proposes criteria to evaluate the suffering and protection of sentient beings, which opens debates on animal vulnerability and the expansion of the moral circle. Vieira Nina and Costa Macêdo⁵⁹⁹ point out that technology can dehumanize if it is not guided by solid ethical principles, generating new forms of exclusion and social fragility. Overcoming vulnerability does not imply its denial, but rather its integration into an ethical, juridical and spiritual horizon that allows fragility to be transformed into an opportunity for growth, solidarity and justice. The philosophical tradition teaches that virtue is born from the struggle against fragility; bioethics, that responsibility arises from the recognition of risk; the law, that legal protection is based on the weakness of the other; theology, that grace acts precisely where human strength is exhausted; and morality, that the care of the vulnerable is the ultimate criterion of all authentic ethics. Human frailty, far from being an obstacle, is the place where the greatness of human dignity is revealed.

A comprehensive understanding of human fragility and vulnerability also requires recognizing that these are not mere passive conditions, but dynamic realities that are transformed over time and that depend on biological, social, cultural, spiritual and technological factors. Vulnerability is not homogeneous: there are structural, conjunctural, relational, self-induced vulnerabilities and vulnerabilities produced by systems of power. Arias-Krause⁶⁰⁰ stresses that Latin American critical bioethics has insisted that vulnerability cannot be understood without considering the historical, economic, and political inequalities that affect entire peoples. Human frailty, in this sense, is not only an ontological condition, but also a social construction that can be aggravated or mitigated by institutions. Structural vulnerability manifests itself in poverty, exclusion, discrimination and violence. These forms of fragility do not derive from human nature, but from social injustice. Rawls⁶⁰¹ argues that a just society is one that organizes its institutions in such a way that inequalities are only acceptable if they benefit the most disadvantaged. Sen⁶⁰² complements this view by stating that justice should be measured by people's actual capacities to live the life they value. Structural vulnerability, therefore, requires public policies aimed at guaranteeing social, economic and cultural rights, as well as mechanisms of redistribution and recognition. Civil and constitutional law, in this framework, has the responsibility to ensure that social fragility does not become destiny. Short-term vulnerability appears in crisis situations: diseases, accidents, natural disasters, armed conflicts, pandemics. These circumstances reveal the precariousness of human existence and the need for health

systems, civil protection and community solidarity. Beauchamp and Childress⁶⁰³ point out that the principle of justice in bioethics requires that health resources be distributed equitably, especially in contexts where vulnerability is intensified. The recent pandemic showed that human frailty is not only individual, but collective, and that global interdependence requires coordinated ethical and legal responses. Relational vulnerability manifests itself in affective, family and community dependence. The ethics of care has shown that human fragility is sustained by support networks that allow the integral development of the person⁶⁰⁴. Childhood, old age, illness and disability are moments where relational vulnerability becomes more evident. The Convention on the Rights of the Child⁶⁰⁵ and the Convention on the Rights of Persons with Disabilities⁶⁰⁶ explicitly recognize that legal protection must consider dependency and the need for support.

Canon law also recognizes this relational dimension by insisting on the pastoral responsibility to accompany those who find themselves in situations of moral, spiritual or psychological fragility⁶⁰⁷. Self-induced vulnerability appears when the person, by their own decisions, is exposed to unnecessary or destructive risks. Classical morality recognizes that human freedom can be directed towards apparent goods that end up damaging personal integrity. Thomas Aquinas distinguishes between human acts and acts of man, emphasizing that moral responsibility depends on knowledge and voluntariness⁶⁰⁸. Self-induced vulnerability does not eliminate dignity, but it requires processes of moral education, spiritual accompaniment and, in some cases, legal intervention to protect the person from himself. Contemporary bioethics addresses this issue in debates about addictions, informed consent, autonomy, and paternalism. The vulnerability produced by systems of power is perhaps the most complex and dangerous form of human fragility. It manifests itself when political, economic, technological or religious structures generate conditions of domination, exploitation or abuse. The Inter-American Court of Human Rights has documented how institutional violence can turn entire populations into vulnerable subjects, as in the Ximenes Lopes⁶⁰⁹ and Campo Algodonero⁶¹⁰ cases. The Magisterium of the Church, especially in *Vos estis lux mundi*⁶¹¹, recognizes that even within religious institutions power dynamics can arise that violate human dignity, and establishes mechanisms to prevent and punish these abuses. Institutionalized vulnerability requires structural reforms, transparency, and accountability mechanisms. Overcoming human vulnerability does not consist in eliminating fragility, which would be impossible and contrary to the human condition, but in transforming it into an opportunity for growth, solidarity and justice. Aristotle already stated that virtue is forged in the fight against fragility, and that prudence consists of deliberating well in situations of uncertainty⁶¹². Thomas Aquinas maintains that grace does not destroy nature, but perfects it, raising human frailty to

⁶⁰³ Cf. Beauchamp and Childress (2019).

⁶⁰⁴ Cf. Gilligan, 1982; Noddings, 1984.

⁶⁰⁵ Cf. ONU, 1989.

⁶⁰⁶ Cf. ONU, 2006.

⁶⁰⁷ Cf. CIC83, Can. 529 §1.

⁶⁰⁸ Cf. Aquinas, Th., *Summa Th.*, 2001–2009

⁶⁰⁹ Cf. Inter-American Court of Human Rights. (2006). Case of Ximenes Lopes v. Brazil. Judgment of July 4, 2006.

⁶¹⁰ Cf. Inter-American Court of Human Rights. (2009). Case of González et al. ("Campo Algodonero") v. Mexico. Judgment of November 16, 2009 (Preliminary Objections, Merits, Reparations and Costs).

⁶¹¹ Cf. Francisco, 2019.

⁶¹² Cf. Aristotle. (1994). *Nicomachean Ethics* (J. Palli Bonet, Trans.).

⁵⁹⁷ Cf. J. Habermas (2003)

⁵⁹⁸ Cf. P. Singer (2011).

⁵⁹⁹ Cf. Vieira Nina y Costa Macêdo (2020)

⁶⁰⁰ See Arias-Krause (2021).

⁶⁰¹ Cf. J. Rawls (1971).

⁶⁰² Cf. Sen, A. (1999)

its fullness⁶¹³. Jonas⁶¹⁴ proposes that ethical responsibility arises precisely from the recognition of the vulnerability of the other and of the world. Levinas⁶¹⁵ affirms that the vulnerability of the face of the other is the source of moral obligation. MacIntyre⁶¹⁶ insists that virtuous communities are those that organize their practices to sustain the most fragile. Singer⁶¹⁷ broadens the moral circle to include all beings capable of suffering, showing that vulnerability is a universal criterion of ethical consideration. The legal overcoming of vulnerability implies building normative systems that protect the weak, guarantee fundamental rights and promote social justice. Civil, constitutional and international law must recognize that formal equality is not enough, and that enhanced protection is necessary for those in fragile situations.

International jurisprudence and human rights treaties are fundamental tools for transforming vulnerability into protected dignity. The theological and spiritual overcoming of vulnerability is expressed in hope, charity and community. Human frailty, illuminated by faith, becomes a place of encounter with God and with others. Christian morality teaches that vulnerability is not an obstacle to holiness, but its condition. The Church, as a community of care, is called to accompany, protect and heal, recognizing that we are all fragile and that mercy is the deepest response to human vulnerability. Finally, the ethical overcoming of vulnerability consists in assuming it as a constituent part of the human condition and in responding to it with responsibility, justice and love. Fragility is not a defect to be hidden, but an anthropological truth that reveals our need for others and our openness to transcendence. Vulnerability, when recognized and embraced, becomes a source of solidarity, compassion and moral creativity. Humanity is built precisely on mutual care, on the protection of the weak, on the search for the common good and on the affirmation of the dignity of each person, especially those whose fragility is most visible. A deep understanding of human fragility and vulnerability reveals that these are not peripheral accidents, but constitutive dimensions of existence. The human person is fragile because he is finite, contingent, relational, historical and open to transcendence. This fragility is manifested in multiple typologies that, far from fragmenting the unity of the person, show the richness and complexity of his or her being. Ontological vulnerability expresses the radical dependence of the human being on the order of being, as pointed out by Aristotle and Thomas Aquinas, who saw in finitude not a defect, but the space where freedom and virtue unfold. Bodily vulnerability, visible in illness, pain and death, reminds us that human life is a fragile good that demands care, responsibility and limits in the face of technological power, as Jonas warned⁶¹⁸. Psychological and moral vulnerability shows that human identity is wounded, exposed to error, suffering and temptation, but also capable of reconstruction, as Ricoeur, Levinas and the ethics of care teach. Social and structural vulnerability shows that human fragility is not distributed equitably, but is aggravated by conditions of injustice, poverty, discrimination and violence. International jurisprudence and human rights treaties have recognized that certain groups require enhanced protection, because vulnerability can be produced or intensified by systems of power. Legal

vulnerability, on the other hand, requires that civil, constitutional and international law establish effective mechanisms to guarantee dignity and fundamental rights, especially when formal equality is not sufficient to ensure real equality.

Technological vulnerability, emerging in the era of biotechnology and artificial intelligence, poses unprecedented challenges to autonomy, privacy and human integrity, forcing us to rethink the ethical limits of intervention on life. Spiritual vulnerability, finally, reminds us that the human being is a being open to meaning, truth and God. This openness implies a radical fragility: the possibility of despair, emptiness and loss of meaning. The Christian theological tradition teaches that this vulnerability is not an obstacle, but the place where grace acts and where the community becomes a space of accompaniment, mercy, and healing. Canon law and the Magisterium of the Church have insisted that the protection of human life, especially in its most fragile stages, is an indispensable moral and pastoral requirement. Overcoming these vulnerabilities does not mean eliminating them, which would be impossible and contrary to the human condition, but integrating them into an ethical, juridical and spiritual horizon that allows us to transform fragility into an opportunity for growth, justice and communion. Ontological overcoming consists in recognizing finitude as a condition of possibility for freedom and virtue. Body improvement is achieved through care, medicine, solidarity and respect for the limits of technique. Psychological and moral improvement requires education, accompaniment, narration of one's own life and cultivation of virtues. Social improvement requires public policies aimed at justice, redistribution and inclusion. Legal improvement implies building normative systems that protect the weak and guarantee effective rights. Technological improvement demands prudence, responsibility and an ethics that puts human dignity above efficiency. Spiritual overcoming is achieved in faith, hope and charity, which make it possible to transform fragility into a path of fullness. In short, human fragility and vulnerability are not realities to be hidden or denied, but anthropological truths that reveal the depth of the human being and his vocation to care for each other. Humanity is built precisely on the ethical, juridical and spiritual response to the vulnerability of the other. Where fragility is recognized and welcomed, the possibility of a truly human life arises, founded on dignity, justice and love. Overcoming vulnerability does not consist in eliminating it, but in turning it into a source of solidarity, responsibility and transcendence. In this sense, human frailty, far from being a limit, is the place where the greatness of the person is manifested and where the possibility of authentic ethics, of just law and of a truly human community is founded.

5.3.33. Relevance in contemporary culture

In today's society, marked by globalization and diversity, confusing ethics and morality can lead to two opposing risks: Moral relativism, which dissolves any common criteria. Normative imposition, which aims to universalize particular codes. The informative analyses of Sevilla⁶¹⁹ and fgbuenotv⁶²⁰ show that understanding this distinction allows dialogue without falling into dogmatism or moral indifferentism. Likewise, reflection on human acts, as Pilar Calva explains,⁶²¹ shows that ethical assessment requires considering intentionality and freedom, elements that transcend social norms.

⁶¹³Cfr. Aquinas, T. (1964–1981). *Summa Theologiae* (60 vols.). Latin text and English translation, introduction, notes, and appendices by the Dominican Fathers of the English Province.

⁶¹⁴Cf. Jonas, Hans. *The principle of responsibility*.

⁶¹⁵Cf. Levinas, E. (1961). *Totality and infinity*.

⁶¹⁶Cfr. Sen, A. (1999). *Development as freedom*.

⁶¹⁷Cfr. Singer, P. (2011). *Practical ethics* (3rd ed.).

⁶¹⁸Cf. Jonas, Hans. *The principle of responsibility*.

⁶¹⁹Cf. Héctor Sevilla. (2020, December 6). *What is ethics and morals?* [video].

⁶²⁰Cf. fgbuenotv. (2009, November 30). *Ethics and Morals* [video].

⁶²¹Cf. Universidad Vasco de Quiroga. (2014, July 31). *Pilar Calva. Acts of man and humans*[video].

5.3.34. A tool for critical deliberation

Forum Larramendi⁶²² stresses that ethics serves to question power structures and critically review current moral norms. In contemporary life, distinguishing ethics and morality allows: Critically evaluate social and technological practices. Recognize plurality without renouncing universal principles. To promote coexistence based on human dignity and not only on inherited customs. Distinguishing ethics and morality allows: Avoiding uncritical moral relativism. Base complex decisions on rational principles. Understanding cultural diversity without renouncing universal values. Exercising personal autonomy in the face of social pressures. Critically evaluate unfair norms or harmful practices. As Ortiz Millán points out⁶²³, the distinction is not merely terminological, but allows us to analyze how norms are constructed and justified in pluralistic societies.

6. Infographics



Figure 1. Infographic: Ethics and Morals - Fundamentals, Differences, and Contemporary Relevance

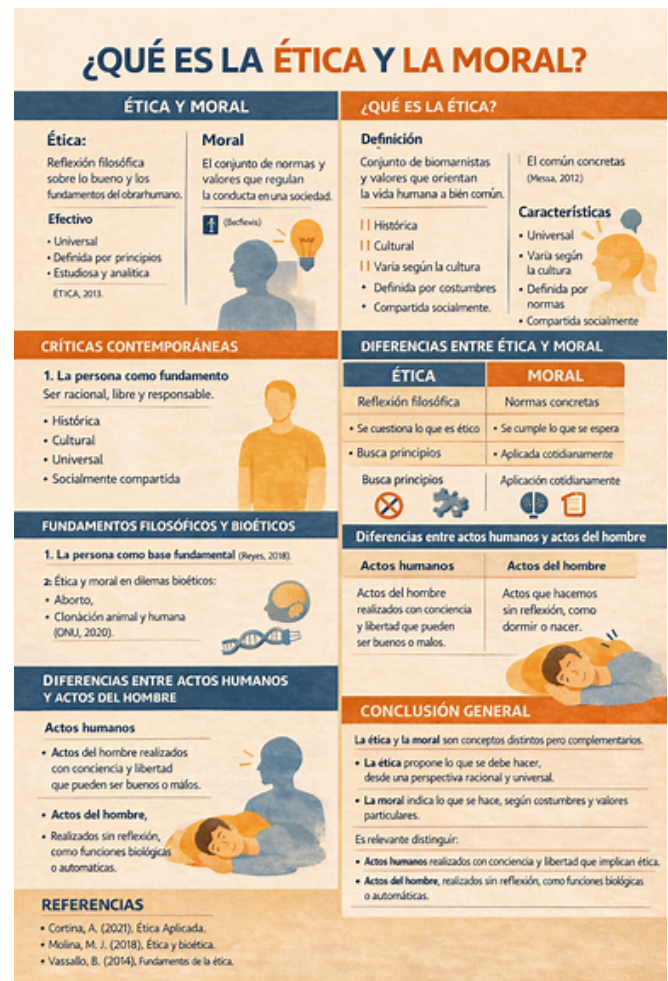


Figure 2. Infographic: What are ethics and morals?

⁶²²Cf. Forum Larramendi. (2014, July 14). What is ethics really for? 1st Part[video].
⁶²³Cf. Ortiz Millán, G. (2016). On the distinction between ethics and morality. Isonomía, (45), 113–139.



Figure 3. Infographic: Ethics and Morals - Foundations, Differences and Contemporary Relevance



Figure 4. Infographic: Complete Synthesis of Ethics and Morals

Table 1. Comparison between Ethics and Morals

Appearance	Concept	Features	Rationale	Application
Ethics	Philosophical reflection on the principles of duty and human action.	Reflective, critical, universalizable, it recognizes dignity.	Person as a rational, free and dignified being (Choro, 2016).	It guides human action from universal principles and the common good.
Morale	A set of norms, values and customs that govern conduct in a community.	Historical, cultural, variable.	Customs and social norms (Varela & Presno, 2010).	It regulates specific behaviors according to what is socially expected.

Table 2. Thematic structure of the content

Section	Main content	Author/Reference
Introduction	Ethics: philosophical reflection on human duty. Moral: principles that guide action.	Varela & Presno, 2010; Segundo, 2023
What about ethics? And what is morality?	Norms, values and customs that govern conduct. Example: "It's okay to help others."	Varela and Presno, 2010
Contemporary criticism	Confusion between ethics and morality. Person as a foundation. Moral value of human acts.	Moro, 2016
Philosophical and bioethical foundations	Person as a rational, free and dignified being. Human acts as free and conscious.	Choro, 2016; Vásquez, 2014
Key Differences	Ethics: philosophical reflection, universal norms. Morals: concrete norms, customs.	Varela and Segundo, 2014
Technological power and responsibility	Ethics and morality as foundations for action in the digital age. Ethical responsibility for the common good.	—
Conclusion	Ethics and morality are distinct but complementary. Ethics is the foundation of morality and orients towards human dignity.	—
Bibliography	Varela, A. (2010); Segundo, G. (2023); Choro, M. (2016); Vásquez, J. (2014)	—

7. Conclusions

Ethics and morality are complementary but distinct concepts. Morality is the set of norms and values that guide behavior in a specific social context, while ethics is the critical reflection that examines, substantiates, and evaluates these norms. This distinction makes it possible to better understand human action, promote autonomy and direct life towards the good. In a world characterized by cultural diversity and complex dilemmas, ethics becomes indispensable to discern between what is simply done and what must truly be done. The distinction between ethics and morality is fundamental to understanding human action in the contemporary context. Morality offers concrete norms that regulate coexistence, while ethics provides the critical reflection that grounds and orients these norms towards the good and human dignity. Contemporary criticisms show that traditional ethics is insufficient in the face of the challenges of technological power, which requires a critical, forward-looking ethics oriented towards future responsibility. Bioethics, especially based on Hans Jonas' principle of responsibility, offers an adequate framework to face these challenges, underlining the need to preserve the possibility of authentic life for future generations. In a world where technology redefines the limits of human action, ethics cannot be applied as an external technique, but rather as a profound reflection on the meaning, ends and consequences of our decisions. The conceptual journey made shows that mature ethical life is based on a fundamental axis: the level of reflection that human beings are capable of exercising on their own actions. Morality provides the basic normative framework, norms, customs, and habits that

make social coexistence possible⁶²⁴. However, this immediate level, although necessary, is insufficient to guarantee a fully human moral life. Ethics appears as the critical instance that makes it possible to evaluate the validity of these norms, to discern between justified and unjustified customs and to direct action towards truly human ends⁶²⁵. The distinction between acts of man and human acts reveals that morality does not reside in any action, but only in those that involve freedom, deliberation, and intention⁶²⁶. Ethics is precisely concerned with illuminating these deliberate acts, showing that moral responsibility arises where the subject can rationally justify his decisions. This process of deepening the moral examination, passing from spontaneous action to the fully human act, constitutes the anthropological nucleus of ethical life. In technified contexts, ethical reflection becomes even more urgent. By automating behaviors and mediating decisions, technology can reduce deliberation and shift human values in favor of efficiency criteria. In the face of this, ethics must guarantee that human action retains its free and responsible character, preventing morality from being subordinated to uncritical technical or social dynamics⁶²⁷. In reality, ethics does not replace morality, but perfects it, allowing the human being to move from mere habit to conscious action, from thoughtless obedience to deliberate responsibility,

⁶²⁴Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute; Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁶²⁵Cf. Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁶²⁶Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans[video].

⁶²⁷Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video]; Forum Larremendi. (2014, July 14). What is ethics really for? Part 1 [video].

and from lived morality to thought morality. The ethical life is also constituted as a continuous process of reflection, discernment and orientation towards the good, through which the person affirms his dignity and freedom in the midst of contemporary cultural and technological challenges. Distinguishing between ethics and morality is not a merely theoretical exercise, but a practical necessity to understand the challenges of contemporary life. Ethics, as a rational and universal reflection, allows us to base principles that guide human action; Morality, as a historical and cultural expression, embodies these principles in concrete norms. Contemporary criticism shows that ethics cannot be applied as an external technique, but must be integrated into responsible deliberation, especially in the face of the growing technological power of human beings. Understanding this distinction is essential to build a more just, aware and responsible society with the future. The conceptual journey made shows that ethical life is based on a fundamental axis: the level of reflection that human beings are capable of exercising on their own actions. Morality provides the basic normative framework, norms, customs, and habits that make social coexistence possible⁶²⁸. But it is ethics that makes it possible to critically evaluate this framework, to discern between valid customs and unjustified practices, and to orient action towards truly human ends⁶²⁹. The distinction between acts of man and human acts reveals that morality does not reside in any action, but in those that involve freedom, deliberation, and intention⁶³⁰. Ethics, therefore, is not an external addition, but the deepest expression of practical rationality: the moment in which the subject understands, justifies and perfects his decisions. In technified contexts, this requirement is intensified, since technology can automate behaviors and reduce deliberation, making ethical reflection even more necessary to preserve dignity and responsibility⁶³¹. In short, mature ethical life arises when the human being passes from spontaneous action to fully human act, and from lived morality to thought morality. Ethics thus becomes the critical and guiding nucleus of moral existence, allowing the person to act not only according to norms, but also according to rationally grounded and good-oriented principles. This integration between morality and ethics constitutes the basis of a truly conscious, free and responsible life. Reflection on morality, ethics, bioethics, and civil, canonical, and international juridical frameworks reveals that humanity, in all ages, has oscillated between luminous greatness and profound frailties. Where morality is weakened, ethics is obscured and responsibility is diluted, forms of poverty inevitably emerge that are not only material, but also spiritual, affective, cultural and relational. History shows that societies that lose their moral compass end up generating new miseries: structural injustices, normalized violence, indifference to suffering, instrumentalization of human life, environmental degradation and ruptures in the bonds that sustain coexistence. However, this same critical observation opens a horizon of hope. Human vulnerability, far from being a sign of defeat, is also the point where reconstruction becomes possible. Where morality is lacking, virtue can be born; where ethics are weakened, responsibility can arise; where the law becomes insufficient, justice can be reborn;

where bioethics faces unprecedented dilemmas, wisdom can grow; Where theology recognizes the wound, grace can break in. Human fragility is not only a limit: it is also a place of encounter, solidarity and transformation. The various forms of economic, educational, affective, spiritual, cultural, technological, and ecological poverty are not only lacks: they are called. Calls to compassion, justice, moral creativity, intergenerational responsibility. Jonas's ethics of responsibility, Gilligan's ethics of care, Aristotle and Rawls' ethics of justice, Ricoeur's ethics of solicitude, and the ethics of dignity of the canonical tradition converge on the same point: humanity is only saved when it recognizes that no one is saved alone. Interdependence, which is sometimes experienced as fragility, is also the condition for the possibility of all hope. Moral education, when it is authentic, does not aim to manufacture perfect beings, but to accompany real people on their path to maturity, freedom and responsibility. Educating in morality is not imposing norms, but awakening the conscience; it is not to domesticate, but to liberate; it is not to standardize, but to humanize. A society that educates ethically is a society that sows the future, that recognizes that every person, even the most wounded, the poorest, the most forgotten, possesses a dignity that no circumstance can erase. Civil law, international law and canon law, when founded on human dignity, can become instruments of protection for those who suffer most. Bioethics, when guided by compassion and justice, can humanize science and technology. Moral theology, when it recognizes the greatness and fragility of the person, can offer a horizon of meaning that sustains hope even in the midst of darkness. That is why, although the lack of morality and ethics produces deep wounds, history shows that humanity has always been capable of regenerating itself. Each era has known its miseries, but also its rebirths. Each society has faced its shadows, but it has also discovered new lights. Hope is not born of denying fragility, but of looking at it head-on and discovering in it a possibility of growth. Human poverty in all its forms can become a place of encounter, solidarity and transformation. In short, humanity is not condemned to repeat its mistakes. Morality can be reborn, ethics can illuminate, law can protect, bioethics can humanize, theology can console, and education can transform. Where misery seems to prevail, a community can emerge that accompanies; where fragility becomes evident, a holding hand may appear; Where dignity is denied, a voice can be raised to defend it. Hope is not naivety: it is the certainty that human dignity, however wounded, is never lost. And as long as there is a single human being capable of recognizing the value of the other, history will remain open to the possibility of a more just, more humane and more fraternal future. As we travel through the vast territory where morality, ethics, law, bioethics and theology intersect, it becomes clear that humanity has always lived under the sign of fragility. Ethical shortcomings are not isolated episodes: they are cracks that cross eras, cultures and systems, exposing the precariousness of our structures and the vulnerability of our decisions. Where solid criteria are lacking, where conscience is numbed or where responsibility is diluted, new forms of human destitution arise: injustices that are perpetuated, bonds that are broken, institutions that are emptied, lives that are disfigured. However, this observation does not lead to discouragement. Precisely because human history is marked by ruptures, it is also full of restarts. Each generation has had to face its own shadows, and yet, in the midst of deep crises, movements have emerged capable of regenerating coexistence, restoring justice and reviving hope. Poverty in its many faces: material, affective, spiritual, cultural, educational, ecological is not only a sign of decadence; It is also a call to moral creativity,

⁶²⁸Cf. Segundo, J. (2023). Ethics and morals: What they are, their similarities and differences; Choza, J. (2016). Manual of Philosophical Anthropology (2nd ed.). Editorial Thémata.

⁶²⁹Cf. Varela Fregoso, G. (2010). Ethics. National Polytechnic Institute; Cifuentes, P. L. M. (2019). Ethics in 100 questions.

⁶³⁰Cf. Universidad Vasco de Quiroga. (2014, July 31). Pilar Calva. Acts of man and humans [video].

⁶³¹Cf. Héctor Sevilla. (2020, December 6). What is ethics and morals? [video]; Forum Larramendi. (2014, July 14). What is ethics really for? Part 1 [video].

active compassion and shared responsibility. The societies that have managed to overcome their darkest moments did not do so only through legal reforms or technical advances, but thanks to people and communities that dared to rebuild from within: educators who awakened consciences, families who transmitted values, institutions that recovered their integrity, believers who offered meaning, scientists who put their knowledge at the service of life, jurists who defended dignity, citizens who chose solidarity over selfishness. Ethical renewal has never been the result of chance: it has always arisen from the decision to look at the other not as a threat, but as a brother. The various forms of poverty that run through the world, from extreme misery to silent loneliness, from social exclusion to the loss of meaning, reveal that humanity needs more than just technical solutions: it needs an inner transformation that restores depth to freedom, truth to justice and humanity to coexistence. Where morality is rebuilt, life recovers its dignity; where ethics is strengthened, the community is reborn; Where education is oriented towards the good, history changes course. That is why, although the contemporary panorama is marked by tensions, inequalities and open wounds, we are not condemned to repeat the mistakes of the past. Human frailty, when humbly recognized, can become a source of renewal. Vulnerability, when welcomed with respect, can open paths of encounter. Poverty, when viewed with compassion, can awaken justice. And history, when read with lucidity, can teach us that it is always possible to start over. Hope is not born of ignoring suffering, but of discovering that even in the most adverse scenarios, human dignity retains an unshakable force. As long as there is a single human being capable of choosing the good, of defending the weak, of caring for life, of seeking the truth or of reaching out to those who fall, humanity will continue to have a future. And that more just, more fraternal, more luminous future always begins in the hearts of those who decide to live ethically, to act morally and to educate for responsibility.

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Sanga Ilakkiyam (Tamil), Rig Veda, Mahabharata (Sanskrit), Old Testament (Hebrew) Egyptian hieroglyphs and Greek ἄρχων (Achilles, Osiris, Bhishma and Karikalan)

Article Record

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Abstract

The classical languages of Greek, Tamil, Sanskrit, and Hebrew consist of extensive ancient literature. Words exhibiting phonological and morphological similarities to the term 'ἄρχων' is observed across these classical literatures. In Greek this term has the meaning of antiquity, ancestry, age, and bygone eras, all pertaining to temporal scales. Conversely, the same word signifies a distinct set of meanings, including leadership, command, governance, and royalty, which are related to administrative functions. Other languages primarily associate the term with administrative roles. The semantic evolution of this word, encompassing two distinct sets of related meanings, is uniquely evident in the Greek language. The word has acquired its higher meaning, that of king, in these languages. Similarities are also found between these languages in its reference to the kings related to the meaning of the word. In this vein, the events associated with the Greek king Achilles have been juxtaposed with King Karikalan in the Sanga Ilakkiyam (Tamil), Egyptian Osiris as well as Bhishma and his family members in the Mahabharata (Sanskrit). Some of these literary figures with similar characteristics also lived as historical figures. So the research of the Greek term 'ἄρχων' has the potential to develop into not only a comprehensive linguistic analysis but also a literary study, and even more so, a historical one.

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Tamil

Sanskrit

Hebrew

ἄρχων

Arason

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Sanga Ilakkiyam (Tamil), Rig Veda, Mahabharata (Sanskrit), Old Testament (Hebrew) Egyptian hieroglyphs and Greek ἄρχων (Achilles, Osiris, Bhishma and Karikalan)

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Abstract

The classical languages of Greek, Tamil, Sanskrit, and Hebrew consist of extensive ancient literature. Words exhibiting phonological and morphological similarities to the term 'ἄρχων' is observed across these classical literatures. In Greek this term has the meaning of antiquity, ancestry, age, and bygone eras, all pertaining to temporal scales. Conversely, the same word signifies a distinct set of meanings, including leadership, command, governance, and royalty, which are related to administrative functions. Other languages primarily associate the term with administrative roles. The semantic evolution of this word, encompassing two distinct sets of related meanings, is uniquely evident in the Greek language. The word has acquired its higher meaning, that of king, in these languages. Similarities are also found between these languages in its reference to the kings related to the meaning of the word. In this vein, the events associated with the Greek king Achilles have been juxtaposed with King Karikalan in the Sanga Ilakkiyam (Tamil), Egyptian Osiris as well as Bhishma and his family members in the Mahabharata (Sanskrit). Some of these literary figures with similar characteristics also lived as historical figures. So the research of the Greek term 'ἄρχων' has the potential to develop into not only a comprehensive linguistic analysis but also a literary study, and even more so, a historical one.

Keywords: *Greek, Tamil, Sanskrit, Hebrew, ἄρχων, Arason, Raja*

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1. Introduction

Every language possesses a unique vocabulary specific to its locality, serving as a primary means of communication within that region. Occasionally, a particular word may appear across multiple languages. In such instances, each language may assert its claim to the word's origin. It can also occur that certain languages vigorously contend that borrowed words belong to them, thereby asserting ownership. To address this issue scientifically, it is necessary to examine the semantic evolution of such words within the respective languages' literature. Therefore, analogical study of word has been carried out here. The exchange of words does not happen in isolation. Words can be exchanged along with their meaning and events related to that meaning. These may have been recorded in literature. In this way, a literary comparison is also carried out here. Consequently, this study seeks to examine the semantic components through which a word is transmitted across different languages. Thus the research analyzes the linguistic features of selected languages, as well as the corresponding literary elements, employing a comparative methodology.

1.1. Research Objective

The objective of this study is to conduct a comparative examination of the classical literatures of Tamil, Greek, Hebrew, and Sanskrit.

1.2. Research Question

This research investigates whether observed similarities across various literatures stem from parallelism or influence. Furthermore, the study examines the potential modes of influence, specifically whether transmission occurred primarily via sea or land routes. Additionally, the research explores the possibility of developing historical concepts from literary sources.

1.3. Research Approach

This research approach utilizes a comparative methodology to explore linguistic features, literary ideas, and associated visual arts, specifically sculptures and paintings. The comparative analysis allows for a detailed examination of how these different art forms intersect and influence one another.

1.4. Classical Literatures

The development of language finds its expression in literature. Literature serves as a repository of the ancient histories and societal values. Integrating language and literary studies uncovers a wealth of concepts. Therefore, it is essential to explore the classical languages and their Literatures globally.

Greek, Hebrew, Sanskrit, and Tamil, being classical languages, possess extensive ancient literatures. This study focuses on the most prominent ancient literature of these classical languages. Consequently, the Old Testament in Hebrew, the Rig Veda and Mahabharata in Sanskrit and the Sangam Ilakkiyam in Tamil are selected for comparative analysis. Similarly, a symbol emblematic of the king can be found within Egyptian hieroglyphs; this, too, is examined within this study.

1.4.1. Egyptian Hieroglyphs

The symbol  functions as a representation of authority in ancient Egypt, as evidenced in its documentation within Egyptian written records as in Figure 1 (Chassinat 1934).



Figure 1. Egyptian hieroglyphs (Temple of Hathor at Deir el-Medina, Luxor, Egypt).

The pronunciation of the word  (king) and the royal symbol  within Ancient Egypt remains undetermined. However, considering the Egyptian origin of this code, additional commentary pertaining to this matter will be offered later in this article. Let us proceed to the study of Greek. The keyword found in this is ἄρχον.

1.4.2. ἄρχον

The term "ἄρχον" appears in ancient Greek literature and inscriptions (Kirchner 1931).

θεοί.
 ἐπὶ Μυστιχίδο ἄρχοντ-
 ος· ἔδοξεν τῇ Πανδίων-
 ἰδι φυλῇ· ἐν τῇ ἀγορᾷ[ι] (19)
 5 τῇ μετὰ Πάνδῖα· Δημό[σ]-
τρατος εἶπε· ἐπαινέσ[α]-
 [ι] Δήμωνα Δημομέλος Π[α]-
[ια]νιᾶ τὸν ἱερέα τὸ Παν-
[δί]ωνος καὶ στεφανῶσα-
 10 [ι χρ]υσῶι στεφάνωι δικ-
[αιος]ύνης ἐνεκα τῆς ἐς
[τὴν φυ]λῆν καὶ δόνα[ι ἀν]-
 [τῶι ἀτέ]λειαν τῶν ἐκ [τῶ]-
 [ν νόμων λ]ητοργιῶν [ἀπ]-
 15 [ασῶν ἐφ' ὃ ἄ]ν ζῆι· ἐνγρά[ψ]-
 [αι δὲ τόδε τ]ὸ ψήφισμ[α τ]-
 [ὸς ἐπιμελητ]ᾶς τὸς με[τὰ]
 [...8.... ἐς τ]ὸ ἱερὸ[ν τ]-
 [οῦ Πανδίωνος].
 IG II² 1140, Attica, c. 386/5

"Gods. In the **archonship** of Mystikhides. It being resolved by the Pandionis. In the agora **after the Pandia**. **Demostratos** said: Demomelos son of **Paianias** commends Demon, **the priest of Pandion**, and crowns him with a golden crown because of his **righteousness toward** the tribe, and grants him an exemption from the all liturgies so long as he lives. The managers record this decree [...]." - Inscriptiones Graecae, II2 1140, line 5, c. 386 BC.,

This Greek inscription contains the word "ἄρχοντος", which pertains to the concept of a kingdom. The term 'ἀρχή' appears frequently within numerous Greek epic literary works. The phonetic characteristics of this word are significant in the realm of comparative studies. Specifically, the phonetic representation of the letter 'χ' within this word undergoes subtle alterations across different languages (Evangelos Vlachos 2015)¹. Furthermore, extensive research endeavors are underway to elucidate the meaning of this word. Certain research (Maciej Roszkowski 2014)² focus on its occurrences in Greek literature, while others explore its presence in Biblical contexts³, which holds considerable research potential.

1.4.3. 'Ἀρχ' and Authority

The term 'ἀρχ' appears in Greek epics and plays (Smyth. 1926), (Jebb. 1887), (Murray1919) which marginally differ in meanings.

κατ' ἀρχῆς γὰρ φιλαίτιος λεῶς. Aesch. Supp. 485	for the people could complain against authority
σχεδὸν τι πρόσθεν ἢ σὺ τῆσδ' ἔχων χθονὸς ἀρχῇ ν ἐφάινου, τοῦτ' ἐκηρύχθη πόλει. Soph. O. T. 737	The news was announced to the town shortly before you first attained power over this land.
470ῇγείσθην δ' Ὀδυσσεύς τε καὶ Ἀτρεΐδης Μενέλαος, τοῖσι δ' ἅμα τρίτος ἄρχων ἐγών: αὐτοὶ γὰρ ἄνωγον. Od. 14. 471	[470] The leaders were Odysseus and Menelaus, son of Atreus, and with them I was third in command;

In these contexts, the root word 'ἀρχ' is associated with concepts of leadership, authority, and dominion. Synonymous terms may be located in other languages.

The correlation between the Greek and Hebrew languages, along with the reasons for their interactions, are common areas of academic inquiry⁴. According to the Hebrew Old Testament, one of the classical literatures of that language, numerous comparative studies have been conducted between Greek and Hebrew languages and their respective literatures, such as the Greek Septuagint and the Hebrew Bible. In this context, the term 'ἄρχον' can also be examined. At times, the same word (Asher Shafir1 2014, Tania Notarius 2017)⁵ is also observed in Hebrew usage. Regarding the Testament, there are no direct equivalents to the Greek word 'ἄρχω'⁶ in Hebrew that share the same meaning. However, a word with similar connotations to the Greek word 'ἄρχω' can be found in ancient Hebrew literature.

¹X is transliterated as ch. This combination is among the most important ones in chelonian nomenclature because it concerns the Greek name for turtle, 'xelone, xelwna'. The actual phonetic interpretation of the letter X is akin to the letter 'h' as pronounced in the word 'hero'. However, transforming the letter x into h would lead to numerous unpredictable phonetic interpretations, as this letter is often 'mute' in various languages. Transforming it into 'ch', however, did not resolve the issue, as this consonant combination also presents a range of phonetic interpretations; it could be rendered as 'k' [chaos], 'ts' [chimney], or 'sh' [share], etc. Therefore, one of the most successful words in chelonian nomenclature is possibly pronounced in many different ways all the time."

²The significance of the semantic range of the term ἀρχή in the thought of sixth-century Greek philosophers, analyzed based on the meanings of certain words containing the ἀρχ- root in early Greek poetry

³Kyriakoula Papademetriou

⁴The victorious campaign of Alexander the Great in the fourth-century BC connected the East with the West. The victory was not merely a political event; its spiritual influence was far more significant. The Greek language became a common tongue for Nearer Asia, and with it came culture, art, and thought. The influence exerted did not entirely supplant the local languages or civilizations. The Jewish community in this period was clearly bilingual and possibly trilingual. Texts from this period indicate the existence of communities where Greek was dominant and others where Aramaic and Hebrew were more prominent. Numerous Greek words entered the Hebrew language. Both the Aramaic and Hebrew of this period underwent transformations not only in the lexicon – over 3,000 Greco-Roman loanwords – but also in phonology, syntax, etc. – Asher Shafir1 (2014)

⁵Tania Notarius (2017)

⁶ἄρχω - Hebrew Equivalent Words: #: 1254 אָרַךְ (baw raw'); 1404 גָּרַחַ (gheb eh' reth); 2490 לָחַץ (khaw lal'); 2974 יָאָחַץ (yaw al'); 3245 יָאָחַץ (yaw sad'); 4911 מָשַׁח (maw shal'); 5081 בִּידָךְ (naw deeb'); 5128 עֹנֵה (noo' ah); 5251 נָעַם (nace); 5257 נֶעֱמַרְךָ (nes eek'); 5493 שֹׁרֵם (soor, soor); 6030 אָנַחַ (aw naw'); 6113 צָרַעַ (aw tsar'); 6260 דִּוְתָעַ (at tood', at tood'); 6544 עָרַף (paw rah'); 7218 רֹשֶׁה (roshe); 7287 דָּאָחַ (raw daw'); 7891 שֹׁרֵה (sheer, shoor); 7981 שֶׁלֵּא (shel ate'); 8199 שֶׁפֶּחַ (shaw fat'); 8271 שֶׁרֵץ (sher ay')

- Old / New Testament Greek Lexical Dictionary

1.4.4. Razan in Hebrew

The Biblical Hebrew language features numerous terms that can be translated as ‘chief’ or ‘prince’ (UCLA Library 1903)

Strong's Hebrew: 8269. שַׂר (sar) – chieftain, chief, ruler

Strong's Hebrew: 5387a. נָסִי (nasi) – one lifted up, a chief, prince

Strong's Hebrew: 4427a. מַלַּךְ (malak) – to be or become king or queen

Strong's Hebrew: 4428. מֶלֶךְ (melek) -- king

There is also a Hebrew word ‘razan’ which occurred three times in the Hebrew Bible. The original word is רָזַן and the transliteration is razan and the Hebrew Biblical word number is 7336. (UCLA Library 1903). Consequently, the Hebrew term “razan” appears in classical Hebrew literature with the meanings of “prince” and “ruler.”

‘Hear O ye kings give ear O ye princes (razan) I even I will sing unto the LORD I will sing praise to the LORD God of Israel’

Judges 5:3

‘The kings of the earth set themselves and the rulers (raza) take counsel together against the LORD and against his anointed saying’

Psalms 2:2

This usage mirrors that of the Greek word “ῥαζον.” While there are phonological distinctions between the words, linguistic theories, such as metathesis, vowel shift, and the softening of consonant pronunciation, suggest potential connections between their differing pronunciations illustrated in Figure 2.

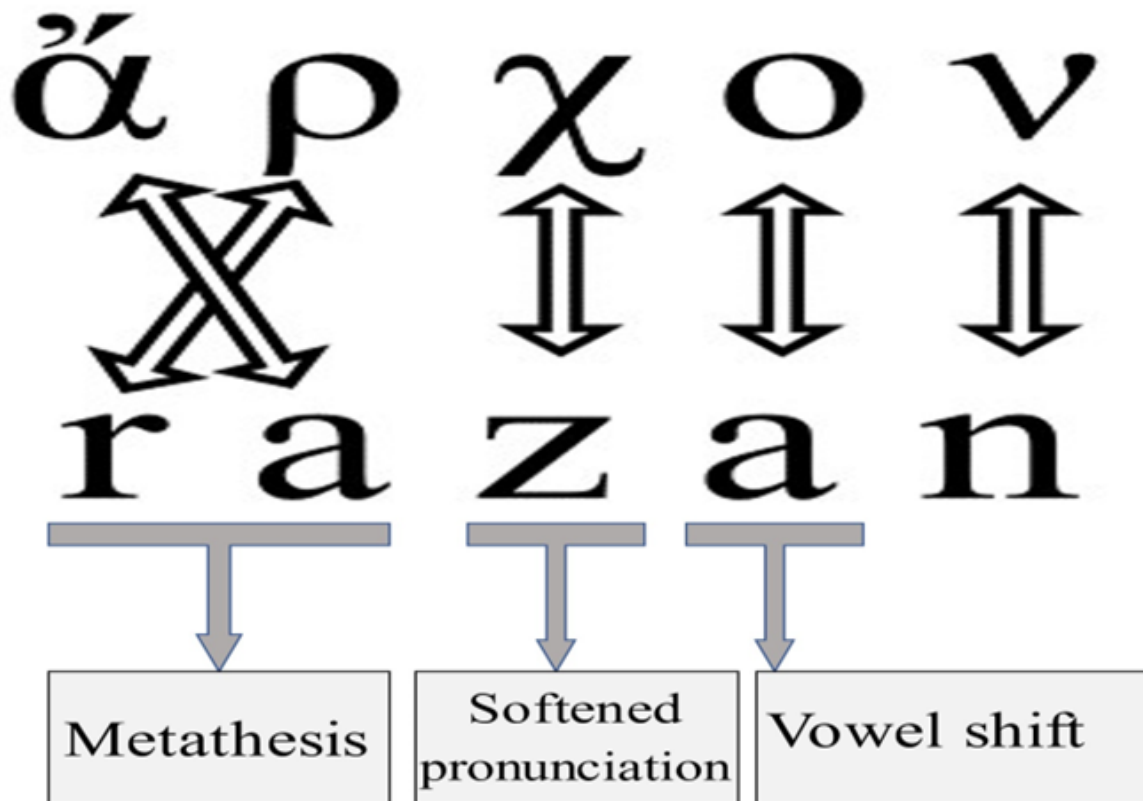


Figure 2. Relationship between the differing pronunciations.

Here, various theories suggest that the Greek letter ‘χ’ transforms into ‘z’ in a foreign language, mirroring phonetical shifts between ‘o’ and ‘a’ that are commonly observed across the languages. Furthermore, the Greek letter ‘α’ demonstrates positional changes⁷. Consequently, words sharing the same meaning but differing in structure within the languages exhibit linguistic resemblances. However, the Hebrew lexicon proposes that this word likely originated from the root meaning of ‘to be heavy.’⁸

Additionally, the concept of “king” is intrinsically linked to land and country; without these, the term becomes devoid of meaning. In Hebrew, there are also terms that signify ‘nation’ (UCLA Library 1903).

⁷Metathesis refers to the transposition of sounds or syllables within a word, or words within a sentence, such as “foliage” > “foilage,” “anemone” > “anenome,” and “cavalry” > “calvary.” Vowel shift denotes a modification in the pronunciation of vowel sounds. The softening of consonant pronunciation is also relevant.

⁸Brown-Driver-Briggs Hebrew Lexicon, The KJV Old Testament Hebrew Lexicon: Transliteration – Razan, Root Word (Etymology) – A primitive root

1.5. 'gō-w-yim' and 'ar-ṣə-kā'

'gō-w-yim' and 'ar-ṣə-kā' are the Hebrew words for nation and land (UCLA Library 1903).

'For I will cast out the nations (gō-w-yim) before thee and enlarge thy borders neither shall any man desire thy land ('ar-ṣə-kā) when thou shalt go up to appear before the LORD thy God thrice in the year'

Exodus 34:24

'The LORD shall open unto thee his good treasure the heaven to give the rain unto thy land ('ar-ṣə-kā) in his season and to bless all the work of thine hand and thou shalt lend unto many nations (gō-w-yim) and thou shalt not borrow'

Deuteronomy 28:12

Here the word 'ar-ṣə-kā only denotes land and the other word represents nation. It is also related with earth (UCLA Library 1903).

'Thou stretchedst out thy right hand, the **earth** ('ā-reṣ) swallowed them.'

Exodus 15:12

'ar-ṣi ארץ (Strong Hebrew No. #0776)

There are many words in Hebrew to denote the word country. The word occurs in many forms like 'ā-rə-ṣāh, 'ar-ṣāh, 'ar-ṣām, ארצות 'ar-ṣêḵ, 'ar-ṣe-kā, 'ar-ṣə-kem, 'ar-ṣê-nū, 'ar-ṣi ארץ, and 'ar-ṣōw with some related meanings.

A little way ('ā-reṣ)

The word 'way' is used in different situations such as the way of life, way on sea, way on land are all words that are related with way. Here the Hebrew word 'ā-reṣ' denotes a type of way (UCLA Library 1903).

'And he said unto him, Go in peace. So he departed from him a little way ('ā-reṣ).'

2 Kings 5:19

Here the Hebrew word 'ā-reṣ' denotes the meaning of a 'little way' which is found on ground. Thus this word also is used to denote ground (UCLA Library 1903).

Ground

'And when Abigail saw David, she hasted, and lighted off the ass, and fell before David on her face, and bowed herself to the **ground** ('ā-reṣ),'

1 Samuel 25:23

Here the Hebrew word 'ā-reṣ' denotes ground. Also related with this word 'ar-ṣe-kā' it denotes land (UCLA Library 1903).

'And six years thou shalt sow thy land ['ar-ṣe-kā] and shalt gather in the fruits thereof'

Exodus 23:10

Here the word 'ar-ṣe-kā' which denotes the land is also used to represent country (UCLA Library 1903).

'Then Pharaoh said to him, "But what have you lacked with me, that behold, you are seeking to go to your own country ('ar-ṣe-kā) ?" And he answered, "Nothing; nevertheless you must surely let me go."

1 Kings 11:22

'But thou shalt go unto my country ('ar-ṣi), and to my kindred, and take a wife unto my son Isaac.'

Genesis 24:4

Here the Hebrew words 'ar-ṣe-kā', 'ar-ṣi' are used to represent the word synonym to the word country.

Consequently, the Hebrew term 'ā-reṣ' functions polysemously, encompassing meanings such as 'way', 'ground', 'land', 'country', and 'earth'. Conversely, the term 'raza' signifies 'ruler', a concept intrinsically linked to the governance of a country. Concurrently, the Hebrew expressions 'ar-ṣe-kā' and 'ar-ṣi' exhibit phonetic similarities with the Greek term 'ἄρχ'. It is pertinent to note that the Greek word 'ἄρχ' lacks semantic connection to concepts such as 'country' or 'land'. While direct historical evidence of bilingual contact remains limited, it has been hypothesized that this observation might suggest a semantic expansion semantic expansion⁹ of the Greek term, evolving from connotations of 'leader', 'authority', and 'power over the land' to encompass the broader Hebrew meanings of 'way', 'ground', 'land', 'country', and 'earth'. Furthermore, the Hebrew term 'ar-ṣe-kā' displays a closer resemblance to the Greek word 'ἄρχον' than to the Hebrew term 'raza'. The following Figure 3 illustrates the sequence.

⁹This refers to a linguistic phenomenon wherein a word's meaning becomes more general or inclusive compared to its historical usage. This process is also recognized as generalization, widening, or extension, reflecting the temporal expansion of a word's semantic range. For example, in English, the word "horn" originally denoted "a protrusion on the heads of certain animals," but its meaning subsequently broadened to encompass "a musical instrument" and then "a drinking vessel shaped like a horn." Semantic broadening can also manifest during the linguistic process of borrowing words from a source language (L1) into a target language (L2), wherein certain L2 loanwords acquire additional meanings absent in the original L1 term.

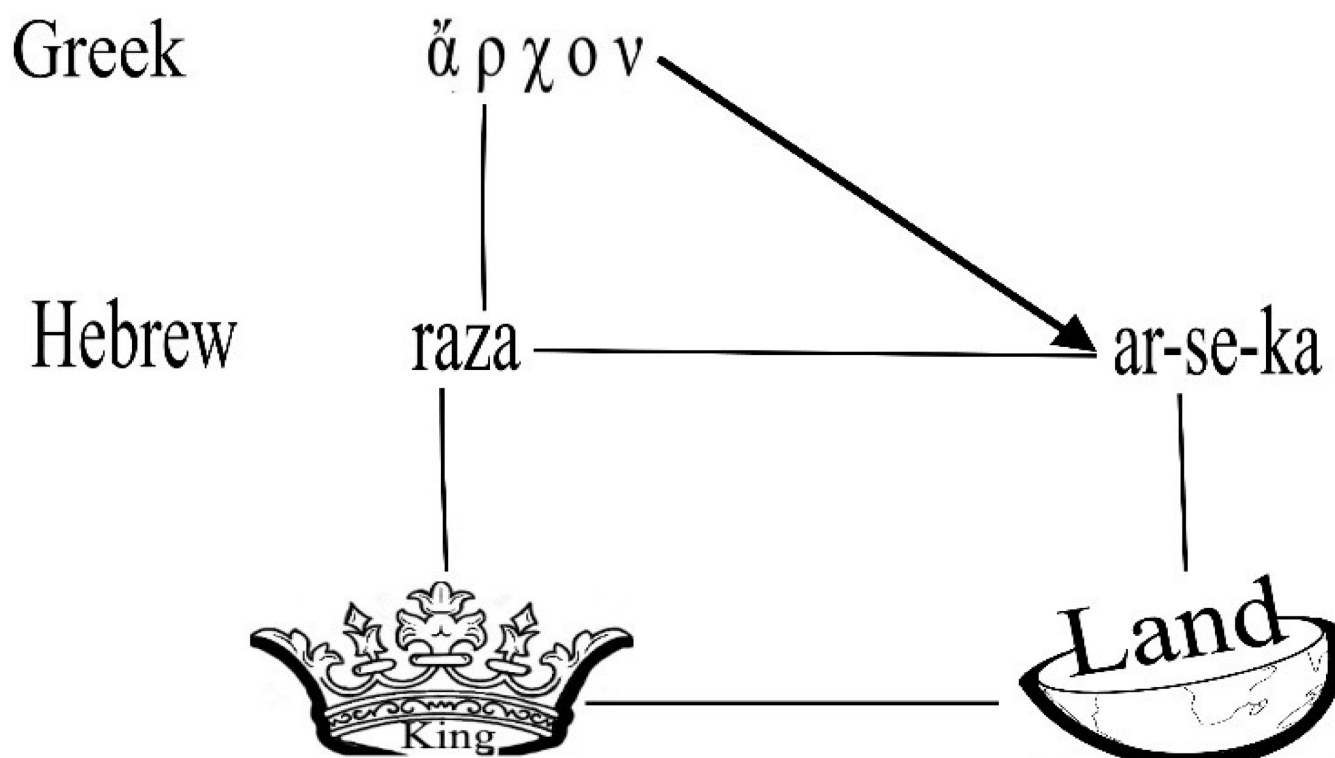


Figure 3. King and Land.

Furthermore, certain scholars have proposed the presence of the term "Arisches" in the Hebrew Old Testament, thereby suggesting a potential linguistic relationship with the German language. It has been observed that this term may derive from the Avestan, an ancient Persian language, specifically from the compound "xsayarsan," which comprises "xsaya" and "arsan."

'arsan' - 'man, male, hero.'

The term 'xsaya' signifies 'ruler, prince, king' (Henry S Gehman 1924). It is observed that 'arsan' does not denote a king, whereas 'xsaya' exclusively pertains to the monarch. The Avestan dictionary indicates several meanings associated with the root 'ras'. These meanings are primarily linked to justice and the military¹⁰

These Avestan and Arabic are related through the words 'Khorasan or Khurasan (Mohammad Ali Chelongar2009)¹¹ The Hebrew tradition is also related to the word (Shaul Shaked 2013)¹² There are differing interpretations regarding its meanings¹³. Historical figures have been given names such as 'Razi or Ray' and 'Kho or Qom' to their subordinates who were related to royal power (Mohammad Ali Chelongar 2009)¹⁴. The names of taxes levied during those times included the word with the suffix 'raj' (Shivan Mahendrarajah 2018)¹⁵, and the name Khorasan itself is derived from the root meaning of authority (Alan V Murray 2018)¹⁶. Khorasan has connections with Arabians (Tayebeh Sadat Hosseini 2017)¹⁷. Therefore, research into the Arabic language is needed. There are related words such as arasan or rajan seen in

¹⁰ rasāstātō [rasāstāt], 8 (G) f. truthfulness, righteousness, justice, equity; Rasastat, a Yazad presiding over (k443)

rasmanō [rasman], 12 (plA) m. the lines or files of the army (k443), rasmaoyō rashnaosh [rashnu], 16 (G) m. Rashnu, a Yazad presiding over truthfulness and justice (k444)

Dictionary of most common AVESTA words, Joseph H. Peterson

<http://www.avesta.org/avdict/avdict.htm>

¹¹ Khorasan and Neishabur, the origins of Taherian, Marve and Samarghand or Samanid' capital, Bokhara were considered Hanafi centers (Seddighi). In the middle of the 3rd century, by fascinating Ray, Neishabur, Samarghand, Tashkand, Esfahan, and Gorgan Shafei's influence replaced the Hanbali and Hanafi dominance.

¹² the intellectual and religious profile of these Khorasani Jews Jews in Khorasan would not normally be using Arabic.

¹³ Khurasan. This was the name of the administrative division of the Sasanian Empire known as xwarāsān (literally "the East") that was created as one of the four military divisions of the Sasanians

- Khodadad Rezakhani

¹⁴ It seems, however, in Khorassan, Ray and Qom, minor power even Sunnite Hadith were seeking dynasties, led to disintegration of Abbasids society and converting it to an archipelago. Outcomes of continuation of the political and military conflicts, however, was not ineffective on Shiite inclinations (Barghi, Rejal, p47). Najishi and Toussi provide a list of the 7th Imam's companions with Razi and Qomi titles. Among them, Abolhassan Mohammad Ibn Jafar Assadi Razi (Toussi, 426), as the agent of Imam Zaman, had an effective role in religious thought of Ray and Qom and in fact he was the person who nurtured the personality of Mohammad Ibn Yaghub Koleini.

¹⁵ Kharāj wazīfa: variable land tax paid by the landholder. This was presumably waived by the patron as it directly impacted the client.

Kharāj muqāsama: tax on the crop (usually levied at 20%) and 'ushr (10%) on the crop. Landlords shifted taxes to peasants, who paid rents and taxes from their share of the harvest.

¹⁶ By contrast, the four chroniclers discussed here use different forms of the name Khurasan in Latin: Corrozana (with a feminine grammatical ending), Corosanum (neuter ending) and forms such as Corruzan without any inflectional ending. Forms used by other writers include Corathania and Corotamia.³² This diversity suggests that the name Khurasan was written in such different ways by the crusade writers because it was unfamiliar to them, and that it came to prominence because they or their informants heard it from Turks or Arabs themselves. I would argue that the use of this name derives from the importance of the traditional Turkish homelands as a source of military recruitment In the crusade chronicles, Corrozana is the nerve-centre of the Seljuk world and the primary source of its power, both military and political. It is the Turkish homeland par excellence, and central in terms of political power.

¹⁷ Khorasan has long been part of Iran and its borders were not the same during history. It was very wide in the 4th century; in addition to the current Khorasan, it included three republics of Turkmenistan, Tajikistan, part of Pakistan and an important part of Afghanistan. Shortly after the conquest of Khorasan by the Arab people, this land became popular as one of the important bases of Arabic poetry alongside the main centers of the Arabic poetry (Daif, 2007, Vol. 2, p. 161). After the establishment of the Arab governors in Khorasan, many Arab poets came into this area and it led to the emergence of the Arabic poetry in that land. Also, the choice of Arabic as the official language of the Muslim world caused Khorasani people to become familiar with the Arabic language and literature and use it in their poetry.

the Arabic vocabulary (Anthony Salmoné 1889). Some suggest it may have originated from China¹⁸. It is evident that the Hebrew terms ‘ar-še-kā, ‘ar-šī, and raza do not belong to the same language and are also not found in Avesta and Arabic. Thus, Avesta and Persian languages have close contact with the Sanskrit language (Prods Oktor Skjaervo 1999)¹⁹ Therefore, research into Sanskrit literature is needed.

1.5.1. Sanskrit

Sanskrit, a classical language of India, boasts a rich literary heritage. Its most esteemed work is the 'Veda'. There are four Vedas, with the Rig Veda being the most influential (Michael Witzel 1999)²⁰. Three primary periods have been identified²¹, and numerous instances of borrowed vocabulary have been noted within this corpus (Michael Witzel 1999)²². Additionally, the literature features various terms employed to denote royalty, including the term 'rājān' (Griffith 1896).

śūrā ived yuyudhaya na jaghmayah
śravasyavo na prtanāsu yetire
bhayante viśvā bhuvanā marudbhyo **rājān**
iva tveṣasandrśo narah
Rig Veda 1.85.8

In sooth like heroes fain for fight they rush about, like combatants
fame-seeking have they striven in war? Before the Maruts every creature is
afraid: the men are like to **Kings**, terrible to behold.

Here, the monarch is designated as "rājān." The letter "j" is employed in place of "z" in Hebrew, although other letters remain consistent. The letters "j" and "z," however, exhibit minimal phonetic distinctions. Consequently, the Greek term "ῥαζον," the Hebrew "razan," and the Sanskrit "rājān" are thought to originate from a shared root. From this term, "rajan," Sanskrit has subsequently developed various other expressions (Griffith 1896).

ghobhiṣ ṭarematim durevām yavena
kṣudham puruhūtaviśvām |
vayam **rājabhiḥ** prathamā
dhanānyasmākenavṛjanenā jayema
Rig Veda 10.42.10

O Much-invoked, may we subdue all famine and evil want with store of grain
and cattle. May we allied, as first in rank; with **princes** obtain possessions by
our own exertion.

na sa jiyate maruto na hanyate na sredhati
na vyathate na riṣyati
nāsyā rāya upa dasyanti notaya ṛṣim vā yaṁ
rājānam vā suśūdatā
Rig Veda 5.54.7

Never is he, O Maruts, slain or overcome, never doth he decay ne'er is
distressed or harmed; His treasures, his resources, never waste away, whom.
Whether he be **prince** or Ṛṣi, ye direct.

In this context, the prince is designated as "rājabhiḥ" and "rājānam." Similarly, the same terminology is used in relation to "ruler" (Griffith 1896).

kuvin mā ghopām karase janasya kuvid
rājānam maghavanṛjīṣin
kuvin ma ṛṣim papivāmsam sutasya kuvin
me vasvo amṛtasya śikṣāḥ
Rig Veda 3.43.5

Wilt thou not make me guardian of the people, make me, impetuous
Maghavan, their **ruler**? Make me a Ṛṣi having drunk of Soma? Wilt thou not
give me wealth that lasts for ever?

Subsequently, another term was derived (Griffith 1896).

ā tvāhārṣamantaredhi dhruvastiṣṭhāvicācaliḥ
|
viśastvā sarvā vāñchantu mā tvad
rāṣṭramadhi bhraśat ||
ihaivaidhi māpa cyoṣṭhāḥ parvata
ivāvicācaliḥ |
indraiveha dhruvastiṣṭheha **rāṣṭramu**
dhārāya ||
Rig Veda 10.173. 1, 2

Be with us; I have chosen thee: stand steadfast and immovable. Let all the
people wish for thee let not thy **kingship** fall away. Be even here; fall not
away be like a mountain unremoved. Stand steadfast here like Indra's self, and
hold the **kingship** in the grasp.

Here, the terms 'rāṣṭramadhi' and 'rāṣṭramu' signify kingship (Griffith 1896).

rājā rāṣṭrānām peśo nadināmanuttamasmai
kṣatram viśvāyu
Rig Veda 7. 34. 11

He, **King of kings**, the glory of the floods, o'er all that liveth hath resistless
sway.

¹⁸the royal family of the Old Turks called 'A-si-na' 'a-si-na (LMC) from Old Chinese chronicles, such as Zhoushu-50 and Suishu-84, there is no term Asina in the Old Turkic and other sources on the Old Turkic peoples. Tang dynasty appointed a nominal ruler titled Ilteber from members of the Asina's family and strategically governed the regional peoples of the steppe and oasis regions, and central Asia from Mongolia, north Tianshan and Sogdiana to Tocharistan. Thus the political system known as Ce-fe can be confirmed during the reign of the Türgish Kaghane from at least AD 750 years.

- Takashi Osawa

¹⁹Old Avestan is grammatically very close to the language of the Rig Veda, the oldest religious texts of the Indo - Aryans.

²⁰The early Vedic period: c. 1700-1500 BC, particularly the hymns in books 4, 5, 6 (and possibly book 2); II. The important middle Vedic period, c. 1500-1350 BC: RV 3, 7, parts of 8.1-66 and 1.51-191; III. The late Vedic period, c. 1350-1200 BC: RV 8.67-103; 1.1-50; 10, 8.49-59.

²¹The books of the Rigveda can be categorized into three groups: the earlier family books (2:4, 6-7), the later family books (5), and the even later non-family books (1, 8-10). {The Recorded History of the Indo-European Migrations - Part 2 of 4 The Chronology and Geography of the Rigveda, }

²²F.B.J. Kuiper (1991) has compiled a valuable collection of approximately 380 'foreign' words found in the RV.

rtena rājannanṛtaṃ viviñcan mama
rāṣṭrasyādhipatyamehi||
Rig Veda 10.124.5

O King, discerning truth and right from falsehood, come and be Lord and Ruler of my **kingdom**.

Here, the terms 'rājā rāṣṭrānām' and 'rāṣṭra' signify "king of kings" and "kingdom," respectively (Griffith 1896).

yā oṣadhīḥ somarājñīrbahviḥ
śatavicaḥṣaṇāḥ |
tāsām tvamasyuttamāraṃ kāmāya śaṃ hṛde
||
yā oṣadhīḥ somarājñīrviṣṭhitāḥ pṛthivīmanu
|
bṛhaspatiprasūtā asyai śaṃ datta vīryam ||
Rig Veda 10.97. 18-9

Of all the many Plants whose **King** is, Soma, Plants of hundred forms, Thou art the Plant most excellent, prompt to the wish, sweet to the heart. O all ye various Herbs whose **King** is Soma, that o'erspread the earth, Urged onward by Bṛhaspati, combine your virtue in this Plant.

Here, the finest plants are designated as 'rājñīr' (Griffith 1896).

yan mā somāso mamadan yad ukthobhe
bhayete **rajasī** apāre ||
Rig Veda 4. 42. 6

When lauds and Soma juice have made me joyful, both the unbounded **regions** are affrighted.

te hi dyāvāpṛthivī viśvaśambhuva
ṛtāvāri
rajaso dhārayatkavī
Rig Veda 1.160. 1

These, Heaven and Earth, bestow prosperity on all, sustainers of the **region**, Holy Ones and wise,

Here the word 'rajasī' denotes the meaning of 'region'.

1.6. Relatives of Rajan

The names have evolved to denote the relatives of "rājān" from the same root word(Griffith 1896).

prātārjarethe jaraṇeva kāpayā vastor-
vastoryajatā ghachathoghṛham
kasya dhvasrā bhavathaḥ kasya vā narā
rājaputrevasavanāva ghachathah ||
Rig Veda 10. 40. 3

Early ye sing forth praise as with a herald's voice, and, meet for worship, go each morning to the house. Whom do ye ever bring to ruin? Unto whose libations come ye, Heroes, like two **Sons of Kings**?

Here, the son of the king is referred to as 'Rājaputre'(Griffith 1896).

yuvām ha ghoṣā paryaśvinā yatī **rājñāuce**
duhitāpṛche vām narā
bhūtaṃ me ahna uta bhūtamaktaveśvāvate
rathine śaktamarvate ||
Rig Veda 10. 40. 5

To you, O Aśvins, came the **daughter of a King**, Ghoṣā, and said, O Heroes, this I beg of you: Be near me in the day, he near me in the night: help me to gain a car-borne chieftain rich in steeds.

Within this context, the daughter of a king is mentioned as "rājñāuce".

Consequently, the ancient Sanskrit literature, specifically the Veda, incorporates the terms "rājān" (Kings), "rājaputre" (Sons of Kings), "rājñāuce" (daughter of a King), "rājabhiḥ" (princes), "rājānam" (princes or ruler), "rāṣṭramadhi" (kingship), "rāṣṭramu" (kingship), "rājā rāṣṭrānām" (King of kings), "rāṣṭra" (kingdom), "rajasī" (regions), and "rajaso" (region) (Nick Allen 2016)²³. The planet's apex is also designated as "rājñīr" (King). The relationship of these terms to "rājān," which denotes "king," is apparent, as they are derived from it. The semantic development of these words shares similarities with that of Hebrew. Simultaneously, there is no reference to the semantic evolution of the word "raza" from Hebrew and "rājān" from Sanskrit. The Sanskrit language is related to another classical language, Tamil. This semantic evolution can also be investigated in Tamil literature.

1.6.1. Tamil Literature

Tamil, recognized as one of the world's ancient classical languages, features numerous classical works that resonate with the general populace. As a classical language of India, Tamil literature, specifically Sanga Ilakkiyam, contains numerous references alluding to the historical relationship between the Tamil people and the Greeks. These interactions are linked to trade (Pugazhendhi 2020a) (Pugazhendhi 2020c) (Pugazhendhi 2021d) (Pugazhendhi 2022a), the exchange of literary forms (Pugazhendhi 2020b), literary themes (Pugazhendhi 2021b) (Pugazhendhi 2024), literary myths (Pugazhendhi 2021a) (Pugazhendhi 2021c) (Pugazhendhi 2022b) (Pugazhendhi 2023), and other areas of connection. Greek literature also attests to these contacts, as do the Hebrews (Pugazhendhi2020).

²³Furthermore, the adjective "virāj" (from "rāj," meaning 'reign') signifies "ruling far and wide, sovereign"

1.6.2. Tamil and Egypt

Egypt's geographical location is along the sea route connecting Tamil Nadu and Greece, it is natural that interaction has occurred between Tamil and Egyptian cultures since antiquity. An ancient agreement, detailing transactions between Tamil and Greek traders residing in the Musiri region, and referenced within Tamil Sangam and Greek literary works, has been discovered in Egypt. A partially obscured section is displayed below in Figure 4.



Figure 4. The Muziris Papyrus (Chen Siwei 2022).

Similarly, Tamil inscriptions have also been discovered there (Figure 5) (Mahadevan 2014).

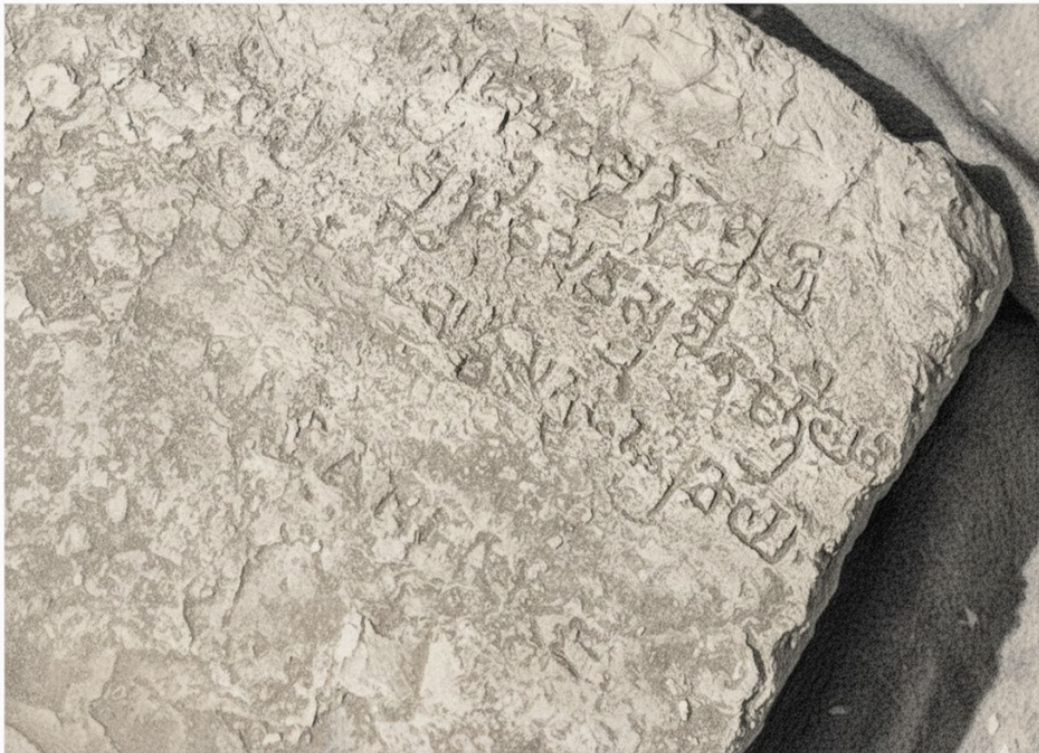


Figure 5. Temple of Isis, Berenike, Egypt.

In the same way, vestiges of ancient Tamil script forms have also been discovered within the Valley of the Kings in Egypt. These are presented below from Figures 6 to 11 (Ingo Strauch and Charlotte Schmid 2026). Although these epigraphical findings date to the late Hellenistic and early Roman periods (1st century B.C. to 2nd century A.D.), they point to an ongoing, continuous connection between these societies rather than an interaction isolated to a particular historical era.

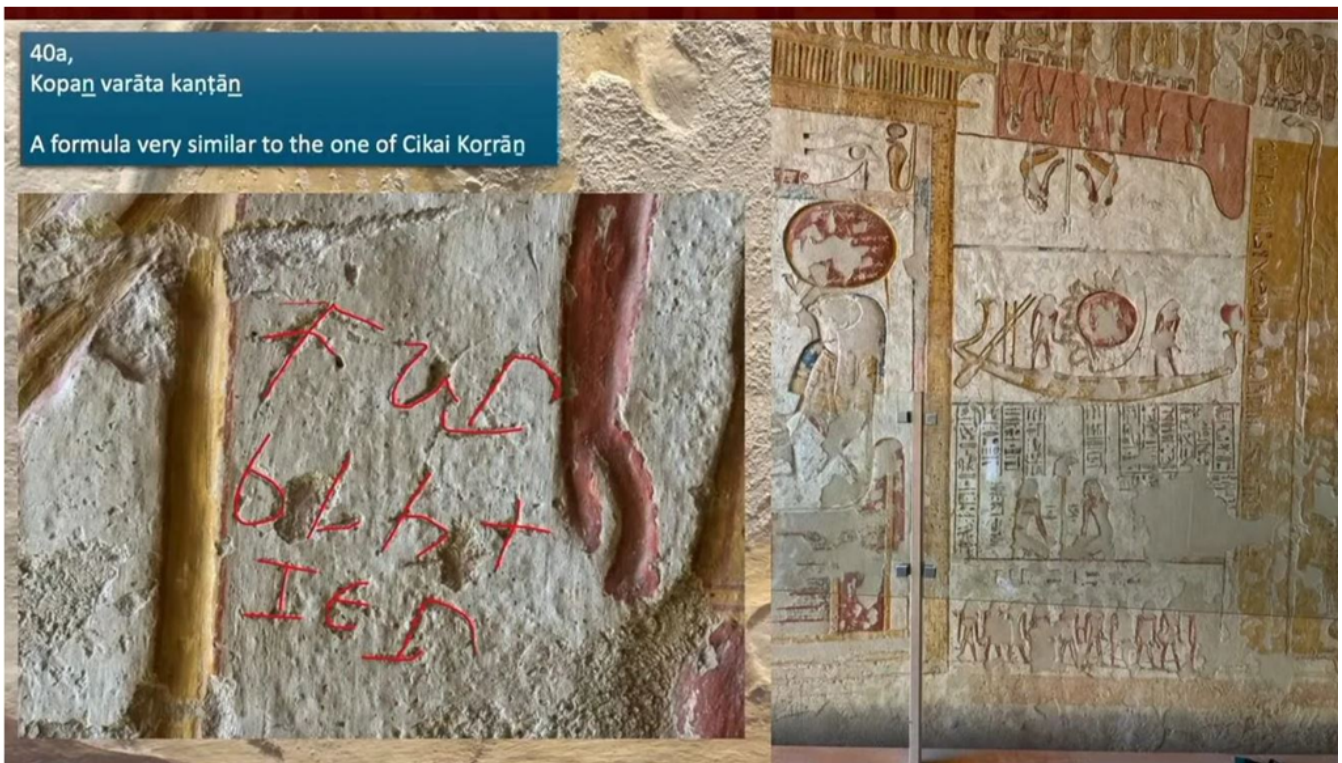


Figure 6. Valley of the Kings, Egypt- Script 1 (Ingo Strauch and Charlotte Schmid 20260)

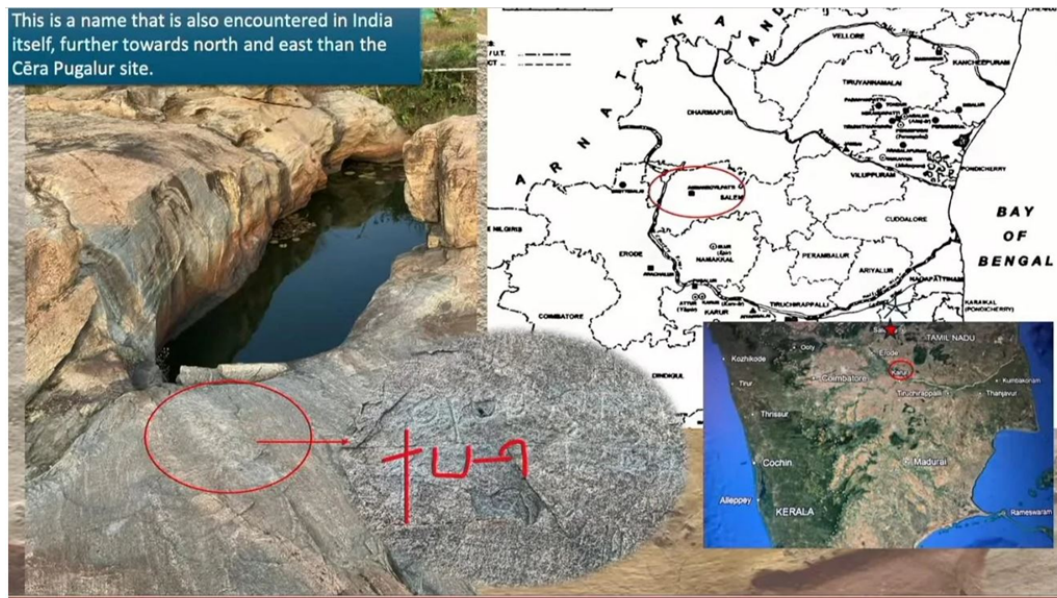


Figure 7. Valley of the Kings, Egypt- Script 2 (Ingo Strauch and Charlotte Schmid 2026).

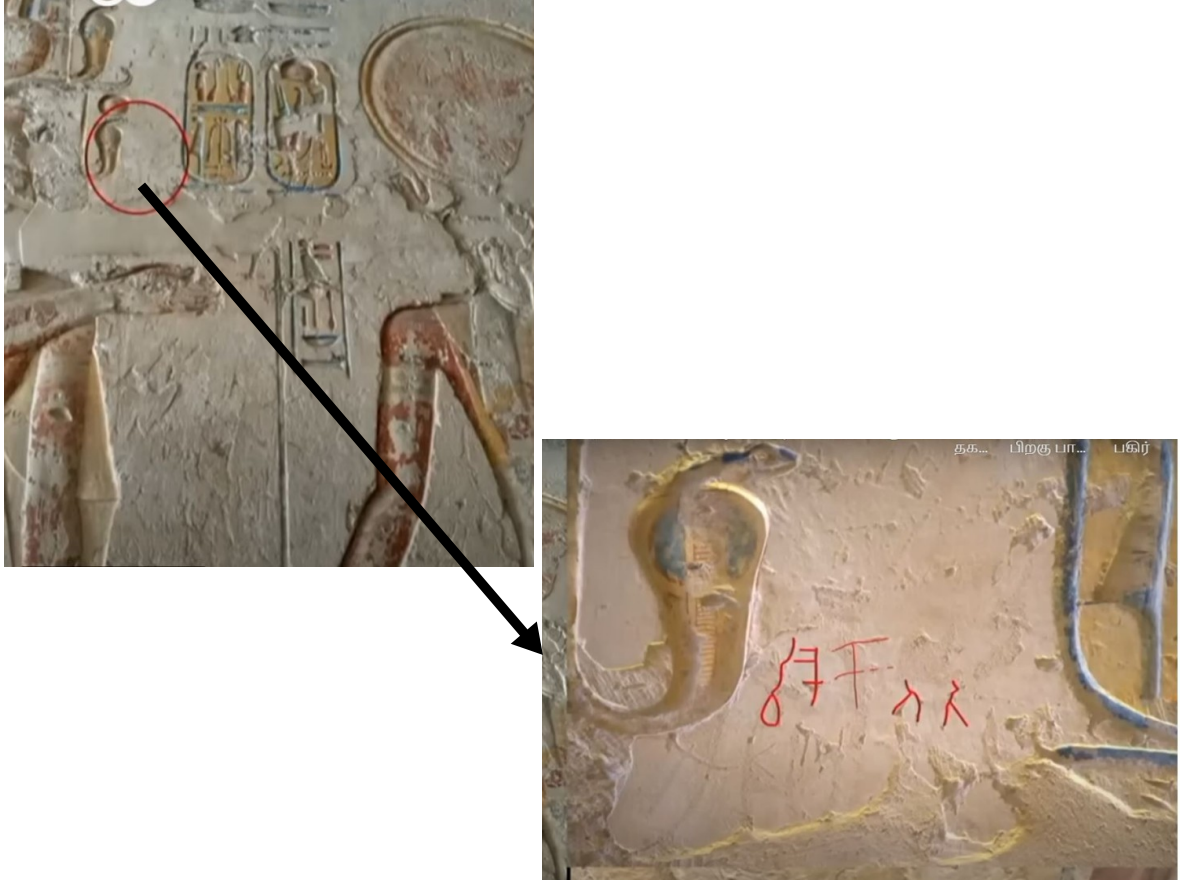


Figure 8. Valley of the Kings, Egypt – Script 3 (Ingo Strauch and Charlotte Schmid 2026).

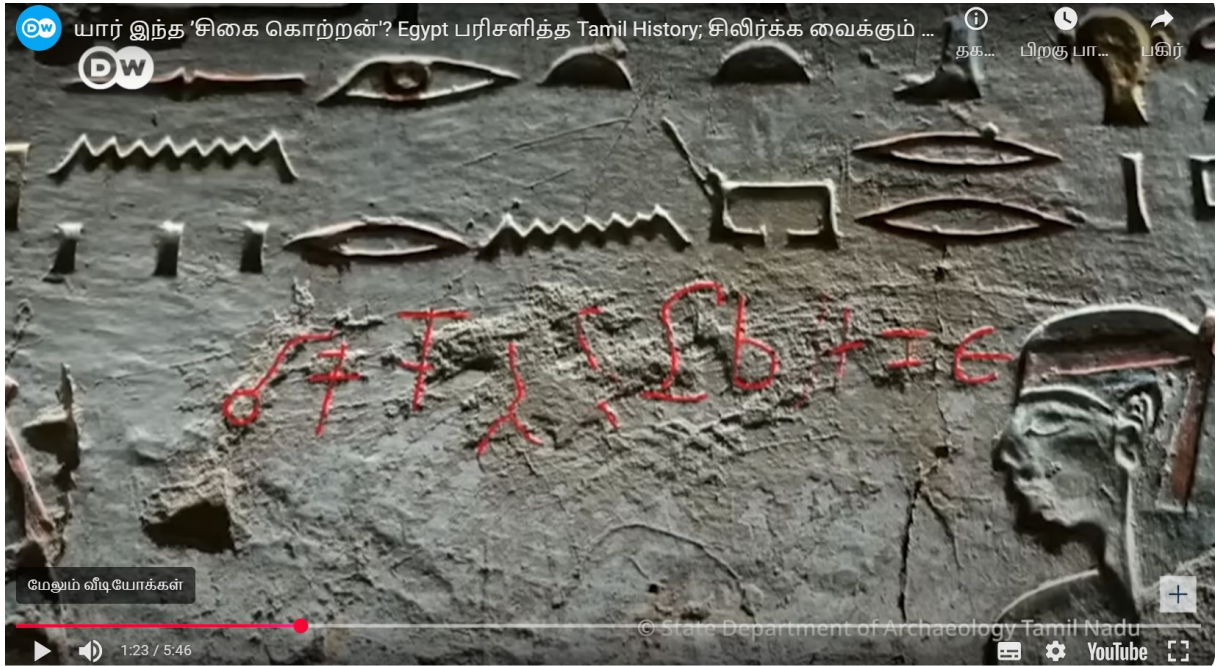


Figure 9. Valley of the Kings, Egypt – Script 4 (Ingo Strauch and Charlotte Schmid 2026).



Figure 10. Valley of the Kings, Egypt – Script 5 (Ingo Strauch and Charlotte Schmid 2026).

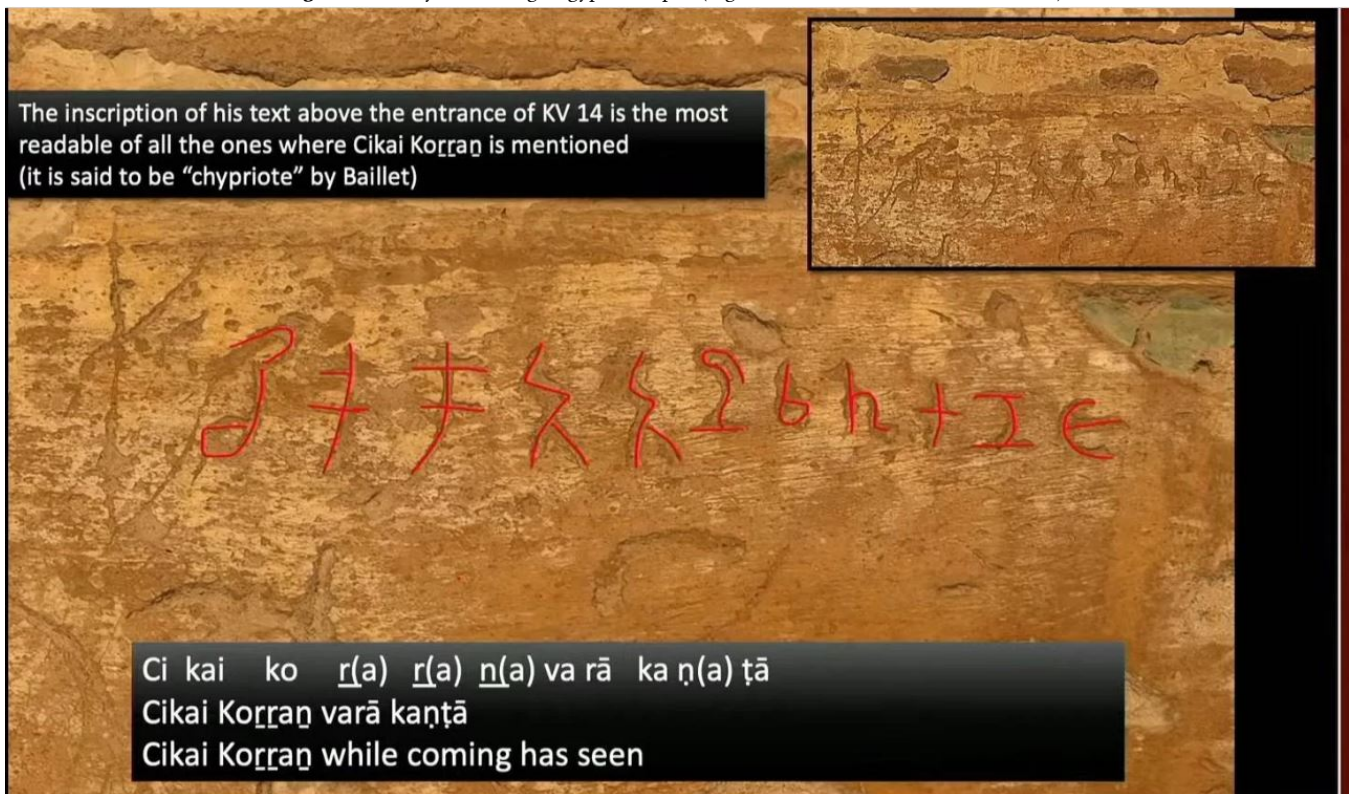


Figure 11. Valley of the Kings, Egypt – Script 6 (Ingo Strauch and Charlotte Schmid 2026).

Valley of the Kings, Theban Necropolis, Egypt²⁴ appears alongside a **larger body of Greek graffiti**.

²⁴Ingo Strauch from the University of Lausanne in Switzerland along with Charlotte Schmid from École Française d'Extrême-Orient (EFEO), or the French School of Asian Studies, deciphered the inscriptions.

1.6.3. Tamil and Hebrew

The Hebrew Old Testament alludes to the arrival of goods from distant lands via sea during the reign of Solomon in the tenth century B.C. These items encompass sandalwood (Almuggim - אֲלֻמְגִּים) and peacock feathers (tukkiyyim - תֻּכִּיִּים), both of which are sourced from Tamil Nadu. They are rendered in Hebrew using their Tamil nomenclature (Pugazhendhi 2020c). Furthermore, Kudal, an alternative name for Madurai in Tamil Nadu, is referenced in Sangam and Greek literature and is rendered as Hoddu - הֹדּוּ in the Hebrew Old Testament. The Hebrew Old Testament designates the India of that period as Hoddu (UCLA Library 1903).

Then were the king's scribes called at that time in the third month that is the month Sivan on the three and twentieth day thereof and it was written according to all that Mordecai commanded unto the Jews and to the lieutenants and the deputies and rulers of the provinces which are from India (Hoddu - הֹדּוּ) unto Ethiopia an hundred twenty and seven provinces unto every province according to the writing thereof and unto every people after their language and to the Jews according to their writing and according to their language

Esther 8:9

Consequently, numerous Tamil words, as they appear in Tamil Sangam literature, can also be found within the Hebrew Old Testament. Such words are provided in Table 1.

Table 1. Tamil and Hebrew words

S.No.	Meaning	Hebrew	Tamil	Meaning
1.	Love, Love of the God	Ahab - אֶהָב	Agam	Love related with family [ie., not directly related with body sex]
2.	Evening, Night	Ereb - עֶרֶב	Eravu	Night
3.	Youth	Elem - עֶלֶם	Elam	Youth
4.	Foot Path	Nathiyb - נַתְיָב	Nadai Pathai	Foot Path
5.	Bitter thing, Bitter herb	Maror - מָרֹר	Marunthu	Medicinal Herb
6.	Abundance	Athereth - אֶתֶרֶת	Athigam	Abundance
7.	Array	â-rak' - אֶרֶק	Aran	Array
8.	Heat	Aza - אֶזָּא	Azhal	Fire
9.	Thief	Gannab - גַּנָּב	Kalvan	Thief
10.	Knowledge	Madda - מַדָּה	Madhi	Knowledge
11.	Rain	Mowreh - מוֹרֵה	Maree	Rain
12.	Country	Ar-ṣî	Arasu	Country, Government
13.	Desire	Avah - אָוָה	Ava	Desire
14.	Vessel	Keli - כֵּלִי	Kalan	Vessel
15.	Distracted	Pun - פֶּן	Pun	Injury
16.	Hidden treasure	Matspon - מַטְסָּוֶן	Marai pom	Hidden treasure
17.	Net, Prey, Stronghold	Matsuwd - מַטְסוּוֹד	Mathil	Stronghold

This evidence establishes the antiquity of the connection between Tamil and Hebrew. Similarly, an exploration of the ancient connection between Tamil and Sanskrit should also be undertaken.

1.6.4. Tamil and Sanskrit

Tamil and Sanskrit have maintained connections since antiquity. Numerous Tamil words are present in the Rigveda, which represents the earliest Sanskrit literature. Furthermore, the Sanskrit Rigveda alludes to a Tamil-speaking group known as the Tamils (Griffith 1896).

3 Praise him, ye तमीळ (Tamil) folk, as chief performer of sacrifice adored and ever toiling,
Well-tended, Son of Strength, the Constant Giver. The Gods possessed the wealth bestowing Agni.

Book 1 Hymn 96.3.
Rig Veda

Consequently, the Sangam literature of Tamil, in conjunction with records of these languages, confirms the connection between Tamil and other classical languages, such as Greek, Hebrew, Sanskrit, and Egyptian language. With the exception of Tamil, none of the aforementioned languages possess such an enduring connection to the five languages and society. Given the amalgamation of languages within the Tamil language, an examination is underway to determine the presence of the term "Greek ἄρχον" in Tamil language.

King

The Sanga Ilakkiam represents the ancient literature of the Tamil language (Pugazhendhi2020)²⁵. It contains numerous terms associated with the concept of kingship. Mannan, Ko, Arasan, Venthana, and Kurisil are examples of terms used to denote kings in historical Tamil literature. Among these terms, Arasan exhibits a phonetic similarity to a Greek word (Tamil Virtual University 1995).

kaTavuL n'ilaiya kal Ogku n'eTu varai,
vaTa ticai ellai imayam Aka,
ten am kumariyoTu AyiTai **arasar**
muracuTaip peruj camam tataiya, Arppu
eza,
col pala n'ATtait tol kavin azitta

'In the land between northern Himalayas and southern Kumari you have crushed many **kings(Arasar)** with roaring drums in massive battles and attained fame in many lands' Pathitruppathu 43, Poet: Paranan, King: Kadal Piraköttiya Chenguttuvan, Tamil Sanga Ilakkiam.

²⁵According to research on ancient Greek literature related to Atti and Cybilie, the era of Tamil Sangam literature extends to 1200 BC."

tirai poru mun'n'Irk karai n'aNic celinum,
aRiyun'ark kANin, vETkai n'Ikkum
cil n'Ir vinavuvur, mAn'tar; atu pOl,
arasar uzaiyarAkavum, purai tapu
vaLLiyOrp paTarkuvar, pulavar:

'People who go to the seashore with pounding waves, ask those who know where they can find water to quench their thirst. In the same manner, wise men, even though they are in the company of **kings (Arasar)**, seek those who are Generous and without flaws.' Puranānūru 154, Poet Mōsi Keeranār sang to Konkānam Kilān, ruler of Konkānam Mountain, Tamil Sanga Ilakkiyam.

Within these references, the term "Arasar" signifies the king. The related terms in the Tamil language were derived from this word, with "Arasu" being one such term, which denotes 'kingdom' (Tamil Virtual University 1995).

tonRu mozin'tu, tozil kETpa
kAl ennak kaTitu urAay,
125
n'ATu keTa eri parappi,
AlagkAnattu ajcuvara iRuttu,
arasu paTa amar uzakki,
muracu koNTu kaLam vETTa
aTu tiRal uyar pukaz vEn'tE!

'O king with great fame and skill in battles! You went swift like the wind, spread flames, Caused fear in enemy's **kingdom (arasu)** and ruined them at Ālankānam battlefield where drums roared!' Lines 126-8, Mathuraikkānji, Tamil Sanga Ilakkiyam.

n'aTTavar kuTi uyarkkuvai;
ceRRavar **arasu** peyarkkuvai;
pEr ulakattu mEen' tOnRic
clruTaiya vizuc ciRappin,
viLain'tu mutirn'ta vizu muttin,

'O warrior king! You uplift your friendly Citizens! You seize **kingships (arasu)** of enemies! Lines 130-2, Mathuraikkānji, Tamil Sanga Ilakkiyam

vaLi iTai vazagkA vANam cUTiya
maN tiNi kiTakait taN tamizk kizavar,
muracu muzagku tAnai mUvaruLLum,
arasu enappaTuvatu n'inatE, peruma!
alagkukatirk kanali n'Alvayin tOnRinum,
ilagkukatir veLLi ten pulam paTarinum,
am taN kAviri van'tu kavarpU UTta,
tOTu koL vElin toRRam pOla,

'In this dense world where winds cannot penetrate, decorated with the sky, with huge ocean as its limits, among the three who rule over the cool Tamil land with roaring drums and armies, your **kingship (arasu)** alone is true royalty! Puranānūru 35, Poet Vellaikudi Nākanār sang to Chōlan Kulamutrathu Thunjiya Killivalavan, Tamil Sanga Ilakkiyam.

kaTuj cinatta kol kaLiRum; kataz pariya
kali mAvum,
n'eTug koTiya n'imir tErum,
n'ejcu uTaiya
pukal maRavarum, ena
n'AnkuTan mANTatuAyinum, mANTa
aRa n'eRi mutarRE, **arasin** koRRam;

Eventhough you own an army with these four divisions – murderous elephants with fierce rage, proud swift horses, tall chariots with rising flags, and foot soldiers with strength in their hearts and desire for battles, esteemed righteousness is the foremost cause for real victory of the **kingship (arasu)**. Puranānūru 55, Poet Mathurai Maruthan Ilanākanār sang to Pāndiyān Ilavanthikaipalli Thunjiya Nanmāran, Tamil Sanga Ilakkiyam

aNagkuTai avuNar kaNam koNTu oLittena,
cEN viLagku ciRappin jAyIRu kANATu,
iruL kaN keTutta paruti jAlattu
iTumpai koL paruvaryl tIra, kaTun' tiRal,
5
ajcana uruvan tan'tu n'iRuttAgku,
arasu izan'tirun'ta allal kAlai,

'When the fierce demons massed together and hid away the distant splendid sun, eyes of humen were ruined and the god who is of fierce form and as dark as collyrium came and put it back, ending the sorrow of those in despair in this round world. Like that, at a difficult time when the Chōla **kingdom (arasu)** was lost, Puranānūru 174, Poet Mārōkkathu Nappasalaiyār sang to Malaiyamān Chōliya Vēnāthi Thirukkannan, Tamil Sanga Ilakkiyam

uRRuzi utaviyum, uRu poruL koTuttum,
piRRai n'ilai muniyatu, kaRRal n'anRE;
piRappu Oranna uTanvayiRRuLLum,
ciRappin pAlAl, tAyum manam tiriyyum;
oru kuTip piRan'ta pallOruLLum,
'mUttOn varuka' ennAtu, avaruL
aRivuTaiyOn ARu **arasmu** cellum;
vERRumai terin'ta n'ARpAluLLum,
klzppAl oruvan kaRpin,
10
mERpAl oruvanum avankaN paTumE.

'It is good to learn from a teacher, helping him during his troubles, giving him substantial wealth and learning with respect, without malice. To those born in the same womb, a mother's mind will be tender toward the man who is learned. the **government (arasu)** will follow the path of the learned man, and not welcome and follow the path of a man just because he is first born.' Puranānūru 183, Āriyappadai Kadantha Neduncheliyan, Tamil Sanga Ilakkiyam.

The term associated with politics is also derived from this root word. Here, the word "Arasiyal" is composed of "Arasu" (government) and "Iyal" (concept or theory). Buildings related to the king are also named using the same root word (Tamil Virtual University 1995).

pala puravi n'IRu ukaippa,
vaLai n'arala, vayir Arppa,
185
pITu aziyak kaTan'tu aTTu, avar
n'ATu aziya eyil vauvi,
cuRRamoTu tU aRuttalin,
ceRRa tevvar n'in vazi n'aTappa,
viyan kaN mutu pozil maNTilam muRRI,
arasiyal pizaiyAtu aRa n'eRi kATTi,
periyOr cenRa aTi vazip pizaiyAtu,

May horses raise dust! May conch shells and vayir horns be blown! May the pride of your enemies be ruined! May the strengths of your hated enemies and their relatives be lost after you seize their forts! May they follow your **political (arasiyal)** path! May you seize their land with ancient groves and show them the just path, Lines 177-196, Mathuraikkānji, Tamil Sanga Ilakkiyam.

you play the lute with benefits of
songs – like wealth with pride, great
fame, strong effort, and the three great
kings owning armies with roaring drums
giving combined audience in an assembly (Arasavai)
Lines 51-55, Porunarātruppada, Tamil Sanga Ilakkiyam.

Here Arasavai = Arasar (King) + Avai (assembly)

Thus the Tamil language uses the meanings such as "king," "kingdom," "politics," and "assembly of the king," all associated with the term "aras." These terms, which are nouns, derive from the word "Arason," meaning "king." There is no available semantic evolution of the word "Arason" in Tamil. While standard Dravidian historical linguistics widely considers the Tamil word *aracan* to be a loanword from Sanskrit *rājan* via Middle Indo-Aryan Prakrit forms, the etymological development of the term's core meaning is not fully traced in Sanskrit either. Therefore, it has been argued that Greek is the only language that preserves the complete semantic evolution of the term, as opposed to Tamil or Sanskrit. As a result, these languages may claim ownership of the word and assert their status as the source languages for other languages. Within this context, the Greek language demonstrates dominance over other languages, as evidenced by the relationship between the words used to represent the king and land in Figure 12.

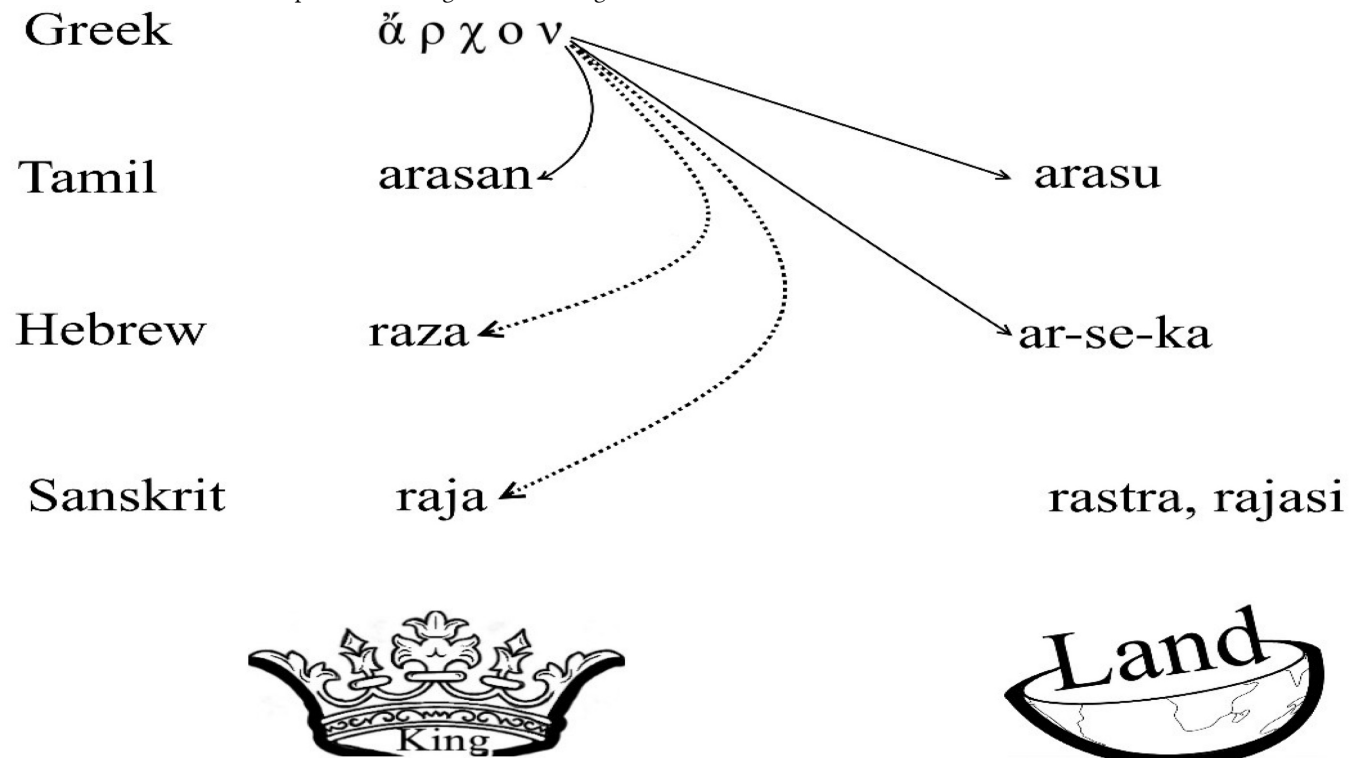


Figure 12. Relationship between the Words.

Here, the terms for "land" – 'at-se-ka' in Hebrew and 'arazu' in Tamil – are closely related to the Greek word ἄρῃον, which signifies "king." Concerning the term for "king," the Tamil word 'arason' corresponds to the Greek term, while 'raza' in Hebrew and 'rajan' in Sanskrit differ from the Greek word. In all these languages, the word has developed semantically in various languages based on the meaning 'king'. The development of this word up to the point of meaning 'king' is worth examining. This semantic development is not visible in any other language except Greek.

2. First

The monarch serves as the initial figure within the realm. The terms "ἄρχον" (monarch) and "ἄρχήν" are semantically linked, with "ἄρχήν" signifying "first" (Francis Storr 1912).

ἄρχήν δὲ θηρᾶν οὐ πρέπει τάμηχανα. Soph. Ant. 92	An impossible hunt should not be tried in the first place
Similarly, it also signifies the concept of commencement (Murray 1924).	
(115) πάντα μάλ' ὅσα τ' Ἀλέξανδρος κοίλῃς ἐνὶ νηυσὶν ἡγάγετο Τροίηνδ', ἣ τ' ἔπλετο νείκεος ἄρχή. Iliad.22.116	(115) and with her all the store of treasure that Alexander brought in his hollow ships to Troy —the which was the beginning of strife
It similarly denotes the meanings of "begin" or "start." (Paul Shorey 1969)	
ὅσον λόγον πάλιν, ὥσπερ ἐξ ἄρχῃς, κινεῖτε περὶ τῆς πολιτείας; Plat.Rep.450A	What a huge debate you have started afresh,
Therefore, this word encompasses meanings such as "first," "begin," and "start." In each instance, it is associated with an action. Consequently, the word appears in context where there is no preceding action. From this point, its meaning has evolved to include the concept of 'first work' (Coleridge 1938).	
ἐλογισάμην οὖν τῷ γένους ἄρχηγέτη μᾶλλον με φῦναι τῆς ὑποστάσης τροφάς. Eur.Orest. 555	So I reasoned that I ought to stand by the author of my being rather than the woman who undertook to rear me.
Due to its initial creation, this term has come to signify "author." The author's work is considered the original and first (Fowler 1921).	
ἀεὶ ἐπιρρέοντα καταχώσει ἡμῶν τὸν ἐξ ἄρχῃς λόγον—ἐπὶ δὲ τὰ ἐμπροσθεν ἴωμεν, εἰ καὶ σοὶ δοκεῖ. Plat. Theaet. 177C,	they will come on like an ever-rising flood and bury in silt our original argument—and let us, if you please, proceed.
The initial instance is also attributed to the founder (Lamb 1925).	
τούτου δὲ τοῦ νομοῦ μεγίστη πόλις Σάις—ὄθεν δὴ καὶ Ἀμασις ἦν ὁ βασιλεὺς—οἷς τῆς πόλεως θεὸς ἄρχηγός τις ἐστίν, Αἴγυπτιστί μὲν τοῦνομα Νηίθ, Ἑλληνιστί δέ, ὡς ὁ ἐκείνων λόγος, Ἀθηνᾶ: Plat. Tim. 21 E	The chief city in this district is Sais—the home of King Amasis,—the founder of which, they say, is a goddess whose Egyptian name is Neith, and in Greek, as they assert, Athena.
The initial instance also relates to the source (Smyth 1926).	
καὶ ταῦτα τᾶπη κλαυμάτων ἄρχηγενῇ. Aesch. Ag. 1628	These words of yours likewise shall prove a source of tears.
At times, the initial element may be obscured; in such cases, it can be argued that the preceding element is relevant (Jebb 1889).	
οἰκτίρατ' ἀνδρὸς Οἰδίπου τόδ' ἄθλιον (110) εἶδωλον: οὐ γὰρ δὴ τόδ' ἄρχαιον δέμας. Soph. O. C. 110	Pity this poor ghost of the man Oedipus! For in truth it is the former living body no more.
If the prior item is not clearly discernible, it may be referenced as having occurred in the distant past (Jebb 1889).	
(1380) τοιγὰρ τὸ σὸν θάκημα καὶ τοὺς σοὺς θρόνους κρατοῦσιν, εἴπερ ἐστὶν ἡ παλαιάφατος Δίκη ξύνεδρος Ζηνὸς ἄρχαίσις νόμοις. Soph. O. C. 1382	(1380) This supplication of yours, and this throne of yours, will lie in the power of my curses, if indeed Justice, revealed long ago , sits beside Zeus, to share his throne through sanction of primordial laws.
Thus, the word 'long ago' is associated with days. Similarly, the word "age" is also related to days; therefore, it signifies the state of being aged (Coleridge 1938a).	
σὺ δ' αὖ λαβοῦσα τεῦχος, ἄρχαία λάτρι, Eur. Hec. 609	Addressing a servant Now you, my aged handmaid,
When age is associated with wealth, it signifies antiquity (Smyth 1926).	
(1040) καὶ παῖδα γὰρ τοῖ φασιν Ἀλκμήνης ποτὲ πραθέντα τλῆναι δουλίας μάξης τυχεῖν. εἰ δ' οὖν ἀνάγκη τῆσδ' ἐπιρρέποι τύχης, Ἀρχαιοπλούτων δεσποτῶν πολλὴ χάρις. Aesch. Ag. 1043	(1040) for even Alcmene's son, men say, once endured to be sold and eat the bread of slavery. But if such fortune should of necessity fall to the lot of any, there is good cause for thankfulness in having masters of ancient wealth;
When pertaining to the palace, it signifies "ancestral." (Jebb 1894)	
παράγεται γὰρ ἐνέρων δολιόπους ἀρωγὸς εἰσὼ στέγας, ἀρχαιοπλούτα πατρὸς εἰς ἐδώλια, Soph. El. 1395	The champion of the spirits infernal is ushered on guileful feet into the house, the rich, ancestral palace of his father, and he bears keen-edged death in his hands.

Thus, the Greek term ἀρχ, serving as the root for ἄρχον from the meaning of 'first', exhibits a range of semantic nuances rarely observed in other languages. It is depicted in Figure 13.

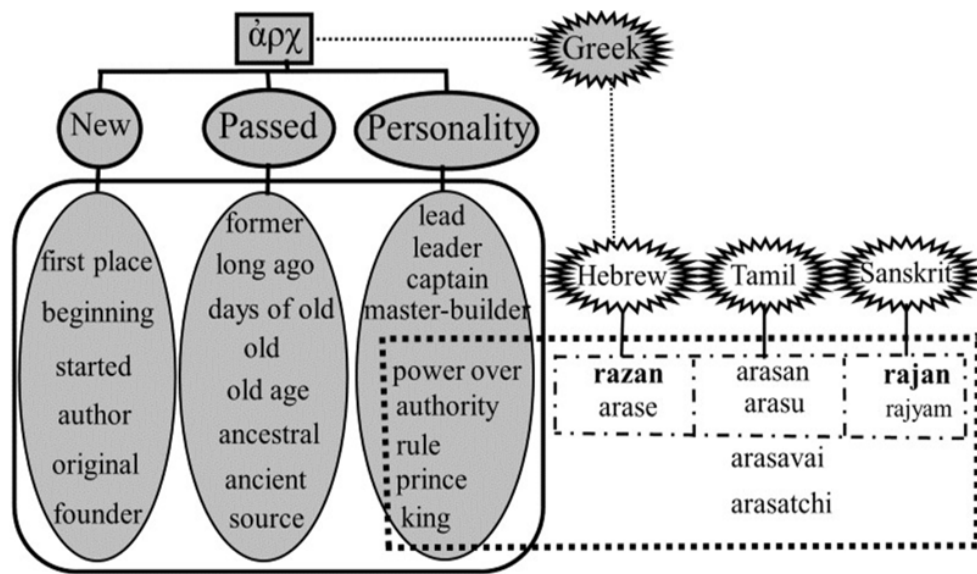


Figure 13. Language and Development of Meanings

This semantic development of the word 'ἄρχων' is illustrated in Figure 14.

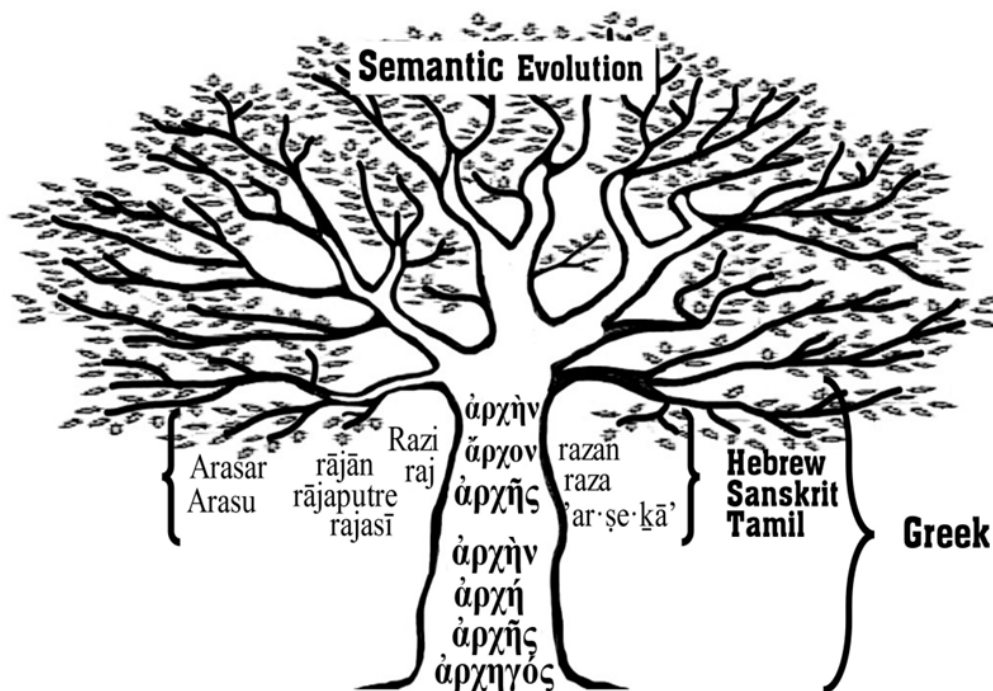


Figure 14. Semantic Evolution

Therefore, there is evidence showing that the evolution of the term, 'ἄρχων' with the meaning "King" originates more profoundly in Greek than in any ancient languages such as Hebrew, Sanskrit, and Tamil. In other languages, the word 'king' means someone with ruling power, while in Greek it means many things, such as the first, former, the organizer, original, ancestor, sourcer, founder, beginner and the one who creates a new country.

Thus, the word ἄρχων, found in Greek literature, is found as 'Arasan' in Tamil literature and as 'Raja' in the Sanskrit Rig Veda. This word is not just a collection of sounds; it is not just a meaningful word that has various meanings; but a term referring to community leadership. If a word that refers to a thing is found in different languages, it means that the thing is in common use in those different linguistic communities. Thus, if the term community leadership is found in different languages, the meaning it conveys is even deeper, going beyond language studies to include sociological research and even to the extent of historical research. To grow beyond the history of

individual societies than towards the history of world. The first step is to examine whether any king found in Greek literature is also found in the ancient literature of other languages where the word ἄρχων is found. Many kings found in Greek literature have parallels with kings found in Sanga Ilakkiyam (Tamil) and Sanskrit literature. Many studies have been conducted in this regard by many scholars. The parallels seem between Greek king 'Ion' and Sanskrit Karna (Pugazhendhi2022 b), Greek Hercules and Sanskrit- Tamil Rama, (Pugazhendhi2021a), Greek Minos and Sanskrit-Tamil Kootruvan (Pugazhendhi 2025), Greek Aegeus and Tamil Ilamveruvazhuthi (Pugazhendhi 2025) are explored in different articles. And (Alonso 2009)^{26,27} on Bhishma (Alonso 2009)²⁸ on Bhishma and Achilles (Alonso 2009)²⁹ on birth (Alonso 2009)³⁰ on Mother (Alonso 2009)^{31,32} on Lady dress (Alonso 2009)³³ on Trozon Horse (Alonso 2009)³⁴ (Alonso 2009)^{35,36,37} on Krishna - Arjuna and Athena - Achilles (Allen 2010)³⁸ on Arjuna and Achilles (Allen 2010)³⁹ (Allen 2010) (Allen 2011)^{40,41} on Ouranos andon Satyavati's stepson Bhishma (Allen 2011)^{42,43} on Zeus and Arjuna (Allen 2011)^{44,45,46} (Allen 2011)⁴⁷ on Roman-Indian Gods (Woodard2006)⁴⁸ (Dumézil 1986) (Jamison

²⁶ Mahābhārata borrow only what they need rather than everything.

²⁷ the conclusions drawn from my book *Grecia en la India: El repertorio griego del Mahābhārata*, its main argument is that the Mahābhārata was written with a great quantity (and quality) of Greek materials near at hand, specifically using the *Iliad* as a kind of guideline or reference point. Nevertheless, it is important to stress that the Mahābhārata's author/s use this Greek "repertoire" brilliantly, creating a new and unique work for a new political, religious, and ideological purposes.

²⁸ Helen is abducted by Paris and Draupadi is humiliated by the Kauravas in the sabhā of Hastināpura.

²⁹ 1. In both epics, the story of the goddess's son provides the frame narrative: her mortal descendant participates both in its beginning and the decisive moments before its end.

2. The wedding of his parents is a product of divine maneuvers.

3. His mother is a water goddess.

4. His mother stays in his father's palace only to later abandon it.

5. There is a conflict between his parents concerning the mother's intent to immortalize her son. Although his mother kills all his brothers, she spares him.

6. He is not raised in the palace, nor by his father, but in a non-human environment where he is gifted with knowledge and trained to be a warrior.

7. Although the heir to the crown, he is never crowned king.

8. He never marries.

³⁰ Achilles is the son of Thetis, a goddess of the sea, and Peleus. According to the Cypria, he is born following various divine intrigues and conflicts for the purpose of bringing about impending destruction. His mother kills her sons in order to make them immortal, but Peleus stops her before she can kill Achilles, and she swiftly escapes.

After marrying Sāmtanu, his mother drowns her first seven sons, but his father demurs as she is about to drown Bhīṣma. Gaṅgā then disappears with her son after telling Sāmtanu who she is. Bhīṣma is reared and instructed in heaven.

³¹ Following his final hour at the end of the war, there is a funeral for him alone; a unique event in the description of the war. His suffering mother had taken care of him throughout the story, and, at his funeral, emerges from the waters before the army. Her words in this scene echo the laments of Thetis from the *Iliad*, and demonstrate a series of very interesting parallels.

³² Other features may be taken from the story of Demeter: entrusted with raising Celeus' son, the goddess places him in the ashes in the hearth in order to make him immortal, but leaves when she is discovered and wrongly accused of harming the boy. Homeric Hymn to Demeter 235-81.

³³ In the second period, during his stay in Omphale's palace, Heracles is represented as a transvestite: he dresses as a woman, is shown spinning, drunk, and dancing in a Dionysian atmosphere.⁶¹ We should recall that while dressed as a eunuch Arjuna teaches dance to the princess.

³⁴ Let us remember that the *Iliad*'s Canto is entirely devoted to a night attack perpetrated by Diomedes and Odysseus. The Achaeans are under siege in their camp, but the two heroes escape at night to carry out a raid against the Trojans and allies, who have besieged them from the surrounding encampment. The side that had been besieging the city of Troy is now under attack and the heroes' raid is a violent rejoinder. Turning to the Mahābhārata now, we also have night attack by Aśvatthāman which occupies the entire tenth song. Following their victory, the Pāṇḍavas have occupied the Kaurava camp, but the situation now changes dramatically. Except for the five Pāṇḍavas and a Vṛṣṇi warrior, Sātyaki, whom Kṛṣṇa has led to a place of safety just before this massacre, all the sleeping Pāṇḍava forces are slain. Although the victims are protected by a god, he cannot fully avert the massacre. Apollo wakes up the Trojan allies during the raid to prevent further destruction, while Kṛṣṇa leads the Pāṇḍavas to another place to evade death. Finally, in both narratives, the main 'protagonist' is a horse; a false one in both cases. In the *Iliad*, it is a wooden horse; in the Mahābhārata, it is a man whose name includes the word horse (aśva) in it, i.e., Aśvatthāman.

³⁵ I calculate about forty direct borrowings. N. J. Allen has explored these and other connections between Arjuna and Odysseus. He has found, for example, that the adventures of Arjuna during his strange exile from Indraprastha have a clear parallel in the stories of Circe and Odysseus.

³⁶ I have tried to demonstrate the main hypothesis of the ubiquitous presence of Greek elements in the Mahābhārata. Further, as this last example suggests, if my hypothesis is correct, then the Mahābhārata's author/s had in their hands a vastly superior amount of Greek material compared to that which we now have.

³⁷ Moreover, it would reinforce the conclusions of authors such as A. Hillebrandt or M. Biardeau who think that the Mahābhārata was written in the period after Alexander the Great and by one writer or a small group of writers in a coordinated way. The continuity of relationships between Greek culture and the Indian Subcontinent after Alexander the Great, as well as its intensification in Roman times, gives us a plausible historical setting for it. The Mahābhārata would be another example of human history being shaped through cultural exchange.

³⁸ Krishna often relates to Arjuna as Athena relates to Achilles or Odysseus (a huge topic!). Krishna helping Arjuna here parallels Athena helping Achilles.

³⁹ Arjuna's divine chariot and horses are described when he receives them but they fairly soon disappear from the text. Nothing is said about the heroes dismounting, but by the last line of the book (225.17) they are sitting on a river bank. Similarly, Achilles' chariot and divine horses are mentioned early in the episode, but the hero soon seems to be on foot and has certainly abandoned his chariot by phase D. The chariot and horses simply fade out.

⁴⁰ The first Kypria fragment tells how Earth (Ge), overloaded with humans, complains to Zeus and thereby brings about the Trojan War. The comparison has long been made with India (e.g., Mahābhārata 1.58) where Earth addresses the same complaint to Brahma- and brings about the Great War.

⁴¹ One thing is certain: good comparisons between individual figures in the two traditions will prove very complicated – correspondences will regularly be multiple and overlapping.

⁴² Ouranos also parallels Satyavati's stepson Bhishma. Both Ouranos and the Dyaus incarnated in Bhishma are names meaning 'heaven'. Both Ouranos and Bhishma lose kingship and virility on a single occasion. Both are followed in the next generation by a male who violently interrupts sexual activity, Ouranos by Kronos, the son who castrates him, Bhishma by Pandu, a stepson who shoots two copulating deer, with disastrous consequences for his own sexuality. Bhishma, the avatar after all of Dyaus, not unnaturally finds points of comparison with the Greek Zeus. At their birth, Bhishma's mother, the Ganges, drowns his seven older brothers in her waters, just as Kronos swallows Zeus's five older siblings.

⁴³ Bhishma spends his final months nearby, out of doors, recumbent on a bed of arrows (like a fakir on a bed of nails). With this we should maybe compare the remarkable and unparalleled scene in which Zeus, sleeping with Hera on Mount Ida, is raised from the earth by upward-growing plants (*Iliad* 14.349).

⁴⁴ Zeus, king of the gods, parallels Arjuna, begotten by the king of the gods. The contrast between Zeus's protracted war with the Titans and his rapid defeat of Typhoeus matches the contrast between Arjuna defeating the Kauravas in a set-piece battle and his final duel with Aśvatthāman (similar in rhythm to the contrast between the Romans defeating the Curiatii and defeating Mettius)

⁴⁵ The night attack in Book 9, like the Sack of Troy, parallels the phase V massacre in the Mahābhārata.

⁴⁶ but in general Odysseus corresponds to Arjuna (occasionally to his elder brother Bhuma). The second half of Odysseus' nostos, from the Circe episode onwards, parallels the journey around India made by Arjuna in Book 1, during which he encounters females at each of the cardinal points. The comparison is with the close association of Arjuna and the animal victim in the Horse Sacrifice of Mahābhārata 15 (very close to the end of the epic). The same book has parallels for both of the sacrifices prescribed by Teiresias (*Odyssey* 11.130-4), and also for the father-son duel in the Telegony. Like Odysseus, Arjuna is killed by his son, but unlike him, he is resuscitated by magic. Father-son duels occur in several other IE traditions, and the Irish one is particularly comparable

⁴⁷ Hesiod's Theogony finds its best Indian parallel early in the Mahābhārata

⁴⁸ Dumézil proposes that Juventas and Terminus represent the Roman counterparts of those deities known among the Indo-ryans as Aryaman and Bhaga, close companions of the great god Mitra, who, like Jupiter, is a god of sovereignty.

1994)⁴⁹ on reason for the similarity is folktale (Hansen 2002)⁵⁰ have researched and commented on this topic. In this way, here the references to kings in the Greek epic The Iliad, the Sanskrit epic Mahabharata, and the Tamil Sanga Ilakkiyam are taken for comparison. Although they appeared in literature, it is possible that some of the history is hidden behind them. In other words, an attempt is being made to conduct this as a literary study aimed at History.

2.1. Name Analogy – Πανδίων

The Iliad records a king named Πανδίων (Pandion) who participated in the Trojan War (Greek Iliad). Another Greek literature records that a king named Πανδίων (Pandion) may have come from India. In Greece, this Πανδίων (Pandion) is associated with the tribe 'Τερμίλαι' (Termilae) (Godley 1920)⁵¹. It has a phonetic similarity to the ethnonym 'Tamilian'. Similarly, the Sanskrit epic Mahabharata mentions that a king named Pandya participated in the war known as Mahabharata. That literature confirms that this Pandyan was a king of Tamil Nadu. Greek literature mentions 'Madurai' as the capital of this Pandyan kingdom in Tamil Nadu. It also has another name 'Koodal'. The Old Hebrew Testament mentions the king of the Indian region '(Hoddu - הודו)'. Thus, the king named Πανδίων which is mentioned in all four language literatures that use the word ἄρχων. And three language literatures are mentioned this 'Πανδίων (Pandion)' as a king associated on the event of war with foreigners. And in Greek literature, this Πανδίων (Pandion) suffers childlessness for a long time. In Tamil Sangam literature, Pandian refers to the beauty of childbearing. The Πανδίων depicted in Greek and Tamil fall into the sea and die (Pugazhendhi 2025). In this way, the similarity of the name Πανδίων and the similarity of events related to him identify the kings mentioned in various language literatures as one as shown in Figure 15.

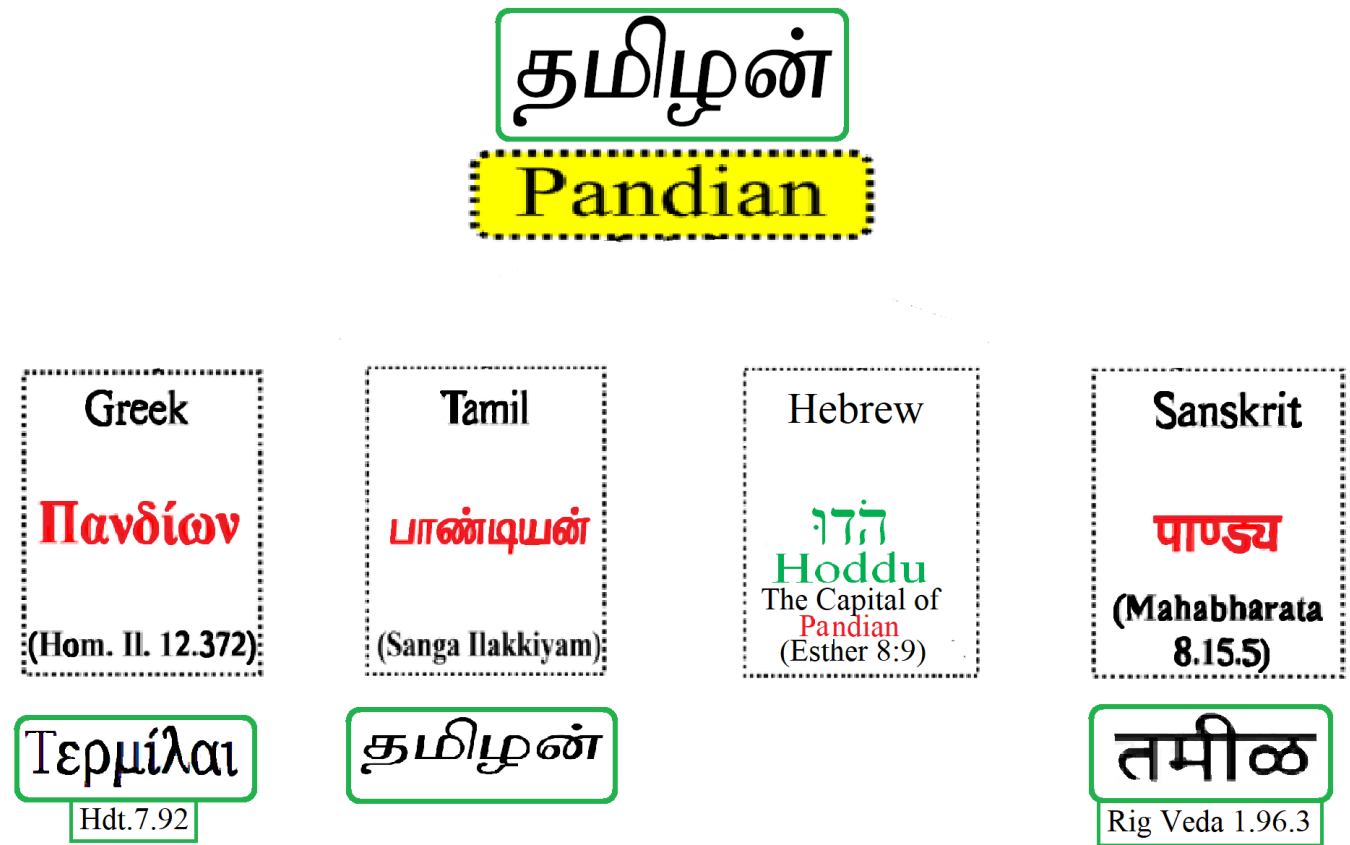


Figure 15. The King Pandian

2.2. Program Analogy

The program is diverse. Some events are common. They belong to most people. Some events are specific to only a few people. It is impossible to identify someone by the similarity seen in the common event. However, with special or rare similarities of event, it has been proposed that one may identify people referred to by different names in different places as alternate versions of the same person, or at least as sharing deep thematic and narrative motifs. Sometimes, it is possible for people with similar events to remain the same but be referred to by different names at different times and in different societies. While standard folklore studies (such as the Aarne-Thompson-Uther index)

⁴⁹ the parallels between a scene in Homer's Iliad (the Teichoscopia in 3.161-244) and one in the Mahabharata are so close that a prototype in Indo-European epic can be assumed.

⁵⁰ Close comparison of ancient and modern variants of the same story leads me regularly to the conclusion that when a Greek legend and an international folktale share a similar plot, the legend derives from the folktale rather than the other way around, for it is almost invariably easier to understand how an individual Greek legend might have developed as a special adaptation of a more general story than to understand how the folktale might have developed from the particularized and highly adapted story that a legend is.

⁵¹ The Lycians are from Crete and were once called **Termilae**; they took their name from Lycus son of **Pandion**, an Athenian. (Hdt. 7.92)

catalog these as widespread archetypes that can arise independently, the presence of specific, rare similarities suggests that these legends and personas may have evolved from a common historical core, leaving a comparative trail in their respective eccentric events. In this way, Karikalan of Tamil Sanga Ilakkiyam and Bhishma of the Sanskrit Mahabharata and his family members are seen as having some parallels with one another. The analogy between them is examined in the subsequent topics.

- **Ocean-related:** Mother Related with Water
- **Foot deformity:** Munneer (Three Water Ripples)
- **At the Bosom of Mother or Caring of Mother:** Prolonged Death
- **Twelve Murders:** Cross-dressing (Men wearing women's dress)
- **Children Thrown into the River:** Innocent Sleeping Death and the Horse
- **Army of Birds**

While not all individuals may discern commonalities among the aforementioned subjects, some individuals have, in fact, identified similarities in specific areas.

3. Ocean-related

The Greek Achilles, Sanga Ilakkiyam (Tamil) Karikalan, Mahabharata (Sanskrit) Bhishma and Egyptian Osiris are all associated with the sea or ship.

3.1. Greek Achilles

The Greek epic poem, 'The Iliad', portrays Achilles as a captain of ships, thereby illustrating his profound connection to the sea and maritime life (Murray 1924).

(685) τῶν αὖ πεντήκοντα νεῶν ἦν ἀρχὸς Ἀχιλλεύς.
ἀλλ' οἳ γ' οὐ πολέμοιο δυσηχέος ἐμνώοντο:
οὐ γὰρ ἦν ὃς τις σφιν ἐπὶ στήχας ἡγήσαιο:
κεῖτο γὰρ ἐν νήεσσι ποδάρκης δῖος Ἀχιλλεύς
κούρης χῳόμενος Βρισηΐδος ἠΰκόμοιο,
(690) τὴν ἐκ Λυρνησσοῦ ἐξείλετο πολλὰ μογήσας

Of the fifty ships of these men was Achilles captain. Howbeit they bethought them not of dolorous war, since there was no man to lead them forth into the ranks. For he lay in idleness among the ships, the swift-footed, goodly Achilles, in wrath because of the fair-haired girl Briseis,

Hom. Il. 2.685 - 690

3.2. Sanga Ilakkiyam (Tamil) Karikalan

Karikalan achieved renowned fame within the navy, and it is purported that his ancestral lineage extended their influence as far as the sea region of Munneer, thus demonstrating his profound connection to maritime endeavors (Tamil Virtual University 1995).

“

O heir of a mighty man who mastered the movement of the wind and had his ships sail on the huge, full ocean! (Munneer) O Karikalan who owns rutting elephants!
— Puranānūru 66, Poet Vennikuyathiyār sang to Chozhan Karikāl Peruvalathān (Karikālan)

3.3. Mahabharata (Sanskrit) Bhishma

Bhishma, a figure from the Mahabharata, is recognized as the son of the Ganga River. The Ganges is referenced within the Mahabharata as a significant river that flows into the ocean (Kisari Mohan Ganguli 2003).

“

(Bhishma) the son of the ocean-going (Ganga).
— Book 6, Bhishma Parva, Section 123, The Mahabharata

3.4. Egyptian Osiris

The ancient wall carving present in the Egyptian temple indicates that the Egyptian Osiris was associated with maritime activities.



Figure 16. East Wall Of The North Wing, Karnak Temple Complex in Luxor, Egypt.

Amongst them, the ancestors of Karikalan are purported to have journeyed as far as the sea, known as Munneer.

3.5. Mother Related with Water

The mother of Achilles in the Greek epic and the mother of Bhishma in the Sanskrit epic Mahabharata are shown to have come from the water and they are shown as returning to the same. Therefore, these mothers are more likely to be single rather than double.

4. Foot deformity

4.1. The Greek Achilles – Foot Deformity

It is recounted that Achilles possessed a congenital flaw in his foot, and consequently, he was mortally wounded in that very area. The cause of this defect is detailed below (Roulez - Ptolemy Hephaestion).

“Thetis burned in a secret place the children she had by Peleus; six were born; when she had Akhilleus, Peleus noticed and tore him from the flames with only a burnt foot and confided him to Kheiron (Chiron).

Consequently, the defect has been demonstrated to be a result of fire.

4.2. Sanga Ilakkiyam (Tamil) Karikalan

The name of the king Karikalan has two parts. Kari + Kal. ‘Kari’ in Tamil language means burned, ‘Kal’ means leg. Karikalan means the person who has burnt leg. Therefore, the Tamil monarch Karikalan’s physical impairment is similarly linked to fire (Tamil Virtual University 1995)..

4.3. Rig Veda – Leg Impairment

Furthermore, the Sanskrit Rig Veda contains a reference to an individual with physical leg impairment. The deity Ashwin bestows upon this person an iron leg (Griffith 1896).

(15) When in the time of night, in Khela’s battle, a leg was severed like a wild bird’s pinion,
Straight ye gave Viśpalā a leg of iron that she might move what time the conflict opened.

Book 1 Hymn 116,
Rig Veda

This god, Ashwin, is connected to the sea and maritime vessels. Varuna, a descendant of the Ashwins, is portrayed as originating from the sea. Given that Varuna is referenced in Tamil literature, it is plausible that the Rig Veda also alludes to the concept of Tamil literature. However, Duryodhana, a character in the Sanskrit epic the Mahabharata, is portrayed with the weakness in his thigh. The etiology of his thigh numbness is presented below.

4.4. Duryodhana – Mahabharata (Sanskrit Epic)

The powerful flames which arose from the eyes of Duryodana's mother had the magical power of strengthening. When she opened her eyes, she saw Duryodana that his thigh portion was covered. The rays which had the sacred power did not touch the covered part. So the thigh part of Duryodana was the weakest part of his body (Vishav 2025)⁵² (Maneeta 2011)⁵³.

In another myth, Duryodana's mother, holding the baby's thigh portion, dipped him in the sacred water to make his body strong. At that time, the sacred water didn't touch the thigh part of baby. So the thigh part became the weakest part of Duryodana's body.

This scene bears resemblance to the Greek depiction of Achilles.

4.5. Foot Deformity and Death

In ancient Greece, the deity Apollo would command the shooting of an arrow through Achilles's injured leg (Roulez - Ptolemy Hephaestion) (Frazer 1921).

"Thetis burned in a secret place the children she had by Peleus; six were born; when she had Akhilleus, Peleus noticed and tore him from the flames with only a burnt foot and confided him to Kheiron (Chiron). The latter exhumed the body of the Gigante Damysos who was buried at Pallene--Damysos was the fastest of all the Gigantes--removed the astragal and incorporated it into Akhilleus' foot using 'ingredients.' This astragal fell when Akhilleus was pursued by Apollon and it was thus that Akhilleus, fallen, was killed (6.8).

Having chased the Trojans also, Achilles was shot with an arrow in the ankle by Alexander and Apollo at the Scaean gate. (Apollod. E.5.3.4)

Similarly, in Sanskrit texts, the deity Krishna instructs Bhima to strike the thigh of Duryodhana having physical imperfection, of the same individual (Kisari Mohan Ganguli 2003).

"Having heard those words of the high-souled Keshava, Dhananjaya struck his own left thigh before the eyes of Bhimasena. Understanding that sign, Bhima began to career with his uplifted mace, making many a beautiful circle and many a Yomaka and other kinds of manoeuvres."

- Chapter 58.5&6, Shalya Parva,
Book 9, The Mahabharat

Another noteworthy parallel exists within these events. At the behest of the god Apollo, Priam mortally wounded Achilles by shooting his spear into his leg. As instructed by Lord Krishna, Bhima utilized his weapon to strike Duryodhana's leg, resulting in his demise. Thus parallels exist between these two accounts.

4.6. Egyptian Osiris

The Egyptian king Osiris is consistently represented with a single leg, thus ensuring support from the crown of the head to the feet. This scene is depicted in Figure 17 (Calverley 1933).



Figure 17. Temple of Seti I at Abydos, Egypt , 294 (or 1290) BCE to 1279 BCE.

Among the seven figures depicted in this image, the second and fourth figures are observed to be standing on one leg. This is shown separately in Figure 18 (Calverley 1933).

⁵²Through years of meditation and self-discipline, she is said to have developed a gaze so powerful that it could make her son Duryodhana's body invincible. In a pivotal moment during the Kurukshetra war, she called Duryodhana to appear before her naked, as he was born, so she could bless his body with protection. When he failed to comply fully—shamed into partial nudity by Krishna—her effort was thwarted.

⁵³As a mother, twice she manifested her affection and concern for her son Duryodhana. Queen Gandhari is distraught when she hears that all her sons save Duryodhana have been slain. Despite knowing that Duryodhana was wicked and his cause unrighteous, she decides to help him win. Asking him to bathe and enter her tent naked, she prepares to use the great mystic power of her eyes, blind-folded for many years out of respect for her blind husband, to make his body invincible to all attack in every portion. When Gandhari's eyes fall upon Duryodhana, they mystically make each part of his body invincible. She is shocked to see that Duryodhana had covered his loins, which were thus not protected by her mystic power.



Figure 18. *Chapel of Amun-Ra, Temple of Seti I at Abydos, Egypt. 1290–1279 BC*

Within this image, the figure of the one-legged performer is presented in close-up. To facilitate the figure's ability to stand on one leg, a metal rod extends from the crown adorning his head and connects to the platform upon which he stands. Despite the compromised grid area within this image, identification can be accomplished using an alternative, undamaged image, as presented in Figure 19 (Calverley 1933).



Figure 19. Chapel of Amun, Temple of Seti I at Abydos, *Egypt*. 1290–1279 BC

Within the image, the attachment of the metal rod to the head's crown is readily apparent. While continuous sections of this rod demonstrate damage in specific areas, reviewing supplementary documentation pertaining to this matter, specifically Figure 20 (Lacau 1956), would be advantageous.



Figure 20. White Chapel of Senusret I, Karnak Open Air Museum in Luxor, Egypt, Middle Kingdom (12th Dynasty)

Within this picture, there are two figures depicted. The initial figure presented is characterized by a single leg. A metallic rod is affixed to the platform from the crown of its head, facilitating its ability to stand on one leg. The depicted scene is clearly visible in the accompanying image (Figure 21) (Calverley 1933).



Figure 21. *Temple of Seti I at Abydos, Egypt. 1290–1279 BC*

The figure, depicted standing on one leg, is observed holding a metal rod extending from head to toe, along with an object  in its hand. The symbol, as illustrated in Figure 22, serves as a representation of authority.

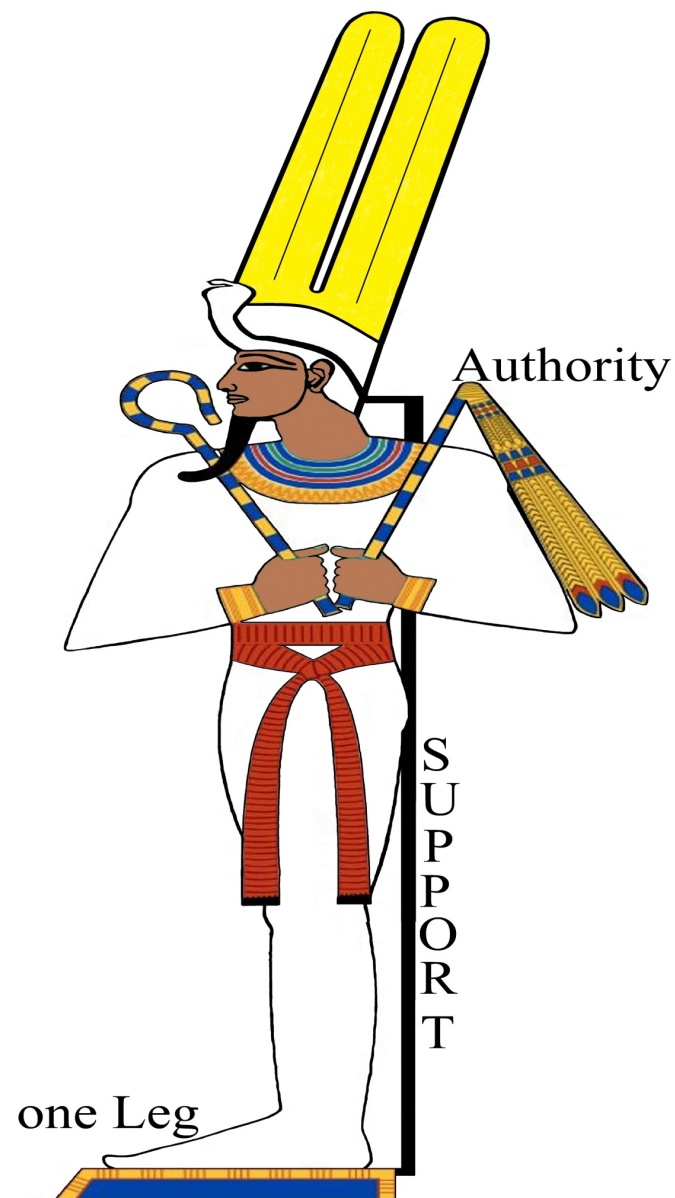


Figure 22. Symbol of Ruling Power

In places where the metal rod is absent, the individual may be supported by others to stand. The aforementioned can be observed in Figure 23 (Faulkner 1990) (Taylor 2010) (Budapest 1967) (Von Dassow 2008).



Figure 23. *Book of the Dead of Aaneru, 21st Dynasty (1070–946 BC)*

Within this image, it is evident that there is no metal rod; instead, the figure is being supported by two individuals. It is also used to symbolically represent the possession of others, as shown in Figure 24 (Calverley 1933) (David 1981) (O'Connor 2009) (Wilkinson 2003) .



Figure 24. Medinet Habu Temple (the Mortuary Temple of Ramesses III) in Luxor, Egypt. 1186–1155 BC

In this figure, there is no metal rod, nor any support from others. However, for symbolic effect, the scene depicts only the legs being held.



Thus, while holding the sceptre in his hand, if he had received the metal rod, he would be referred to as "Amun-Min"; however, if he did not receive it and stood on one leg with other support, he would be referred to as "Osiris".

The Greek Achilles and the Sanga Ilakkiyam (Tamil) Karikalan had foot deformities. Duryodhana, a family member of Bhishma in the Sanskrit epic Mahabharata, has a thigh defect. And Egyptian Osiris also has some defect in the leg. These four individuals are connected to water. Duryodhana's ancestor, Bhishma, was associated with the Ganges, a river that connects to the ocean. The remaining three are associated with the sea and ships. Despite their physical impairments, they have assumed leadership position. The leg deformities of these three are associated with fire. There are no references to the cause of the Egyptian Osiris's leg deformity.

In this way, these four are similar as shown in Figure 25.

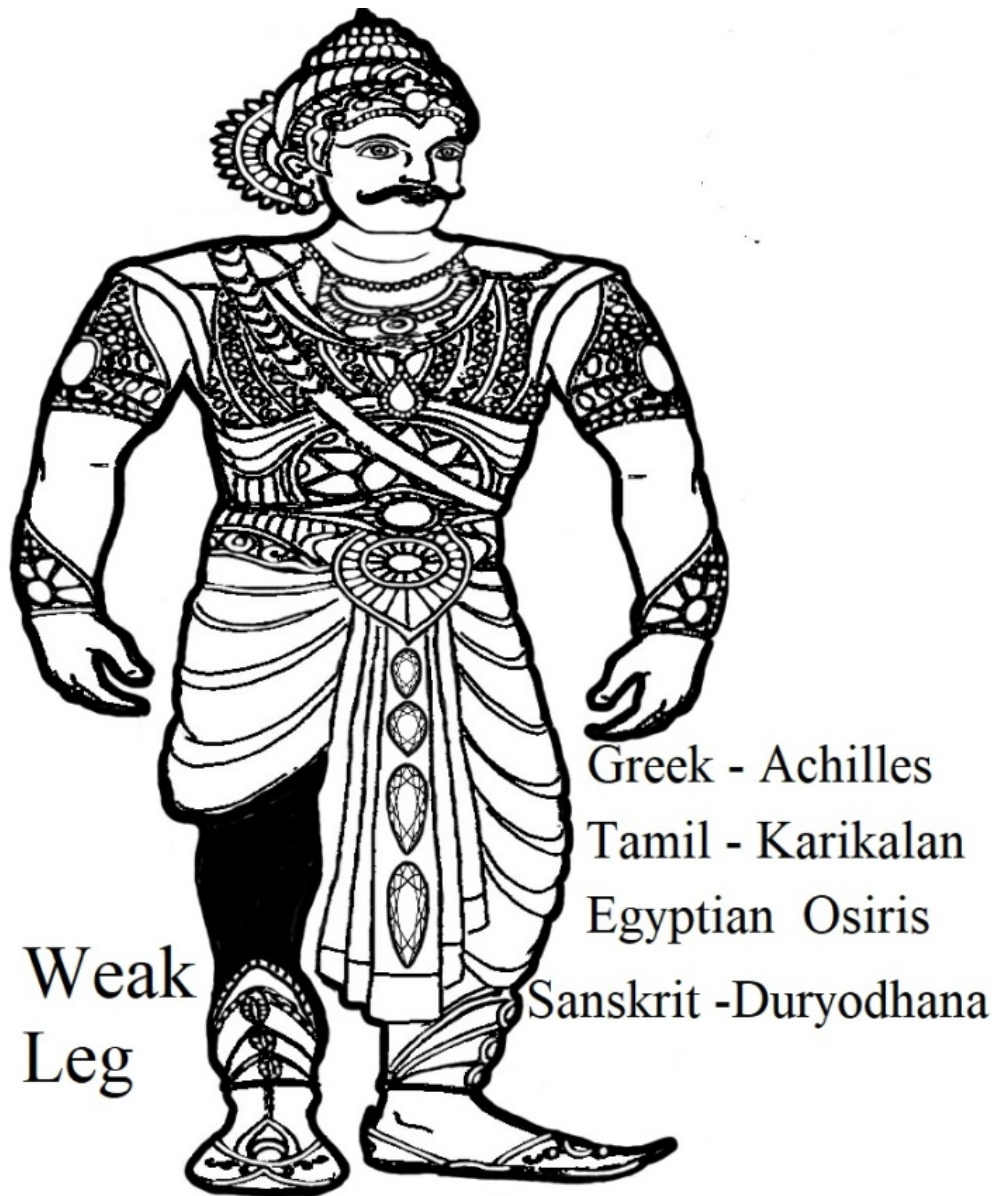


Figure 25. Foot deformity of King(s)

4.7. Munneer (Three Water Ripples)

It is mentioned that the forefather of the Tamil Karikalan was a notable individual who traveled as far as the sea known as Munneer. The Tamil term "Munneer" signifies "three waters". The concept of "Munneer" is also evident in Egyptian culture, as illustrated in Figure 26 (Calverley 1933) (David 1981) (O'Connor 2009).



Figure 26. *Temple of Seti I at Abydos, Egypt. 1290–1279 B.C*

The ancient sculpture is distinctly illustrated in the sketch presented in Figure 27.

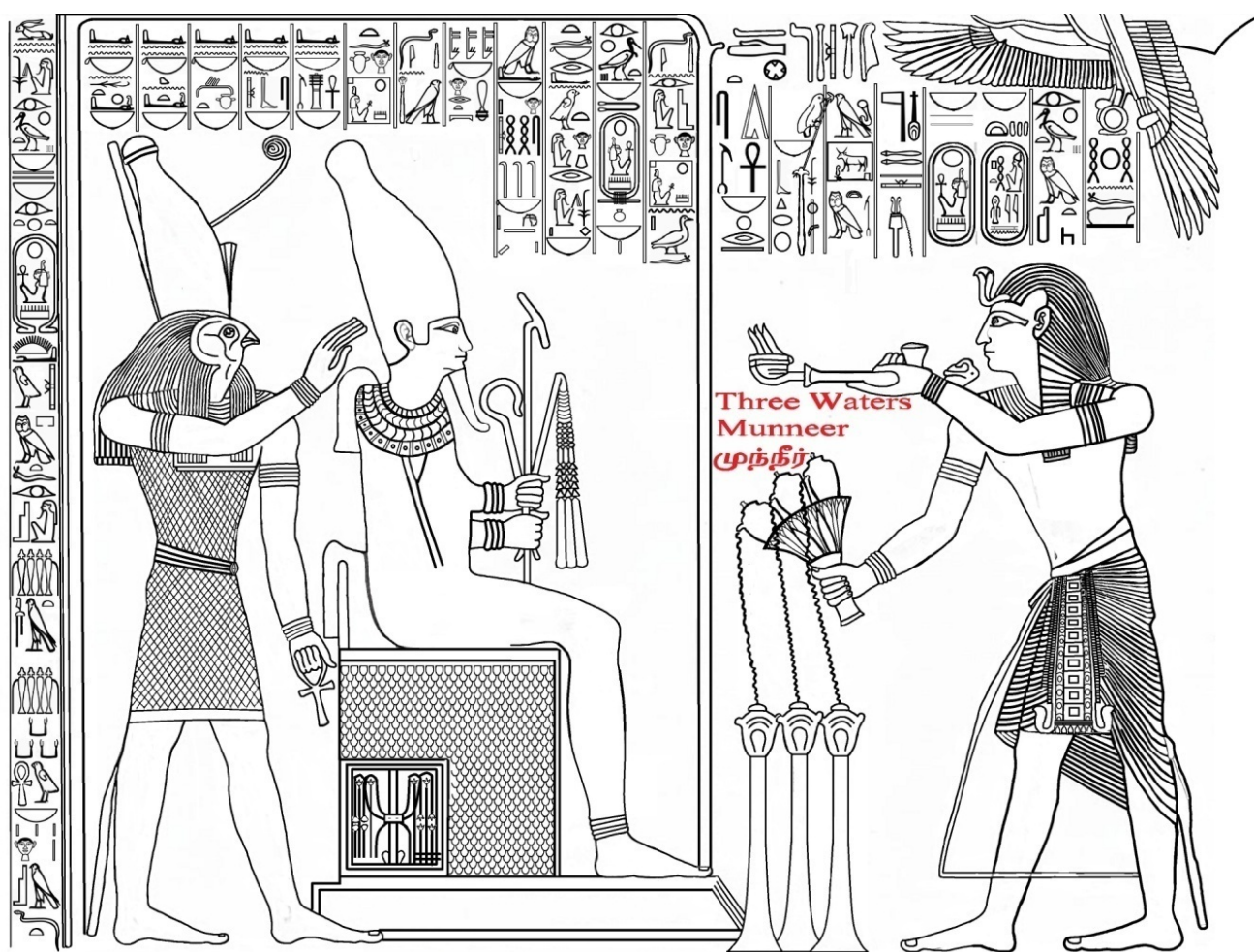


Figure 27. Illustrative sketch related to Figure 26.

In this image, Osiris is seated with one leg. He is supported by a person with the face of an eagle, who stands behind him. The three waters are depicted in front of Osiris. These three waters, associated with Osiris in Egypt, are also connected to the ship sculpture depicted there, as illustrated in Figure 28 (Nelson 1930) (Epigraphic Survey 1932).



Figure 28. *Karnak Temple Complex in Luxor, Egypt, 1292–1069 BCE*

The ancient sculpture is clearly depicted in the sketch provided in Figure 29.

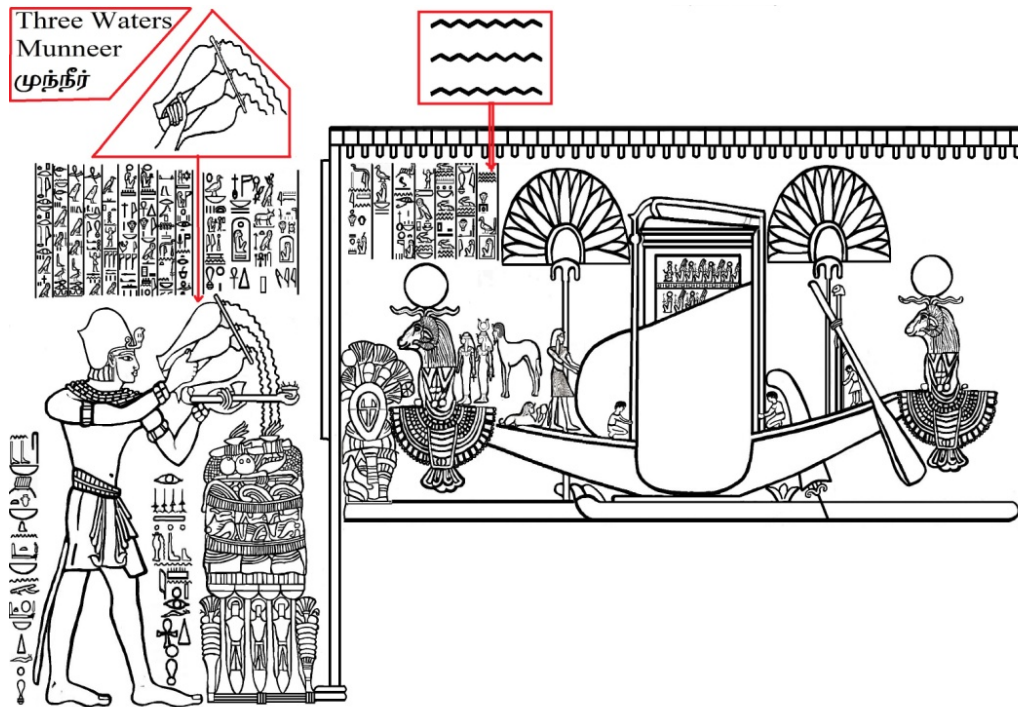


Figure 29. Illustrated sketch of Figure 28.

Within this image, one can observe three bodies of water that are associated with the vessel. The figure of trinity represents not only a noteworthy phenomenon but has also been integrated into Egyptian hieroglyphs which is shown in Figure 30 (Cauville 1987) (Wilkinson 1992).

Three Waters
Munneer
முந்தீர்



Figure 30. Temple of Kom Ombo, Egypt.

Several Egyptian hieroglyphs employing this concept are examined in the formats below (Figures from 31 to 34).



Figure 31. Munneer - Egyptian Hieroglyph 2. (Red Chapel of Hatshepsut, Karnak Temple, Luxor, Egypt.)

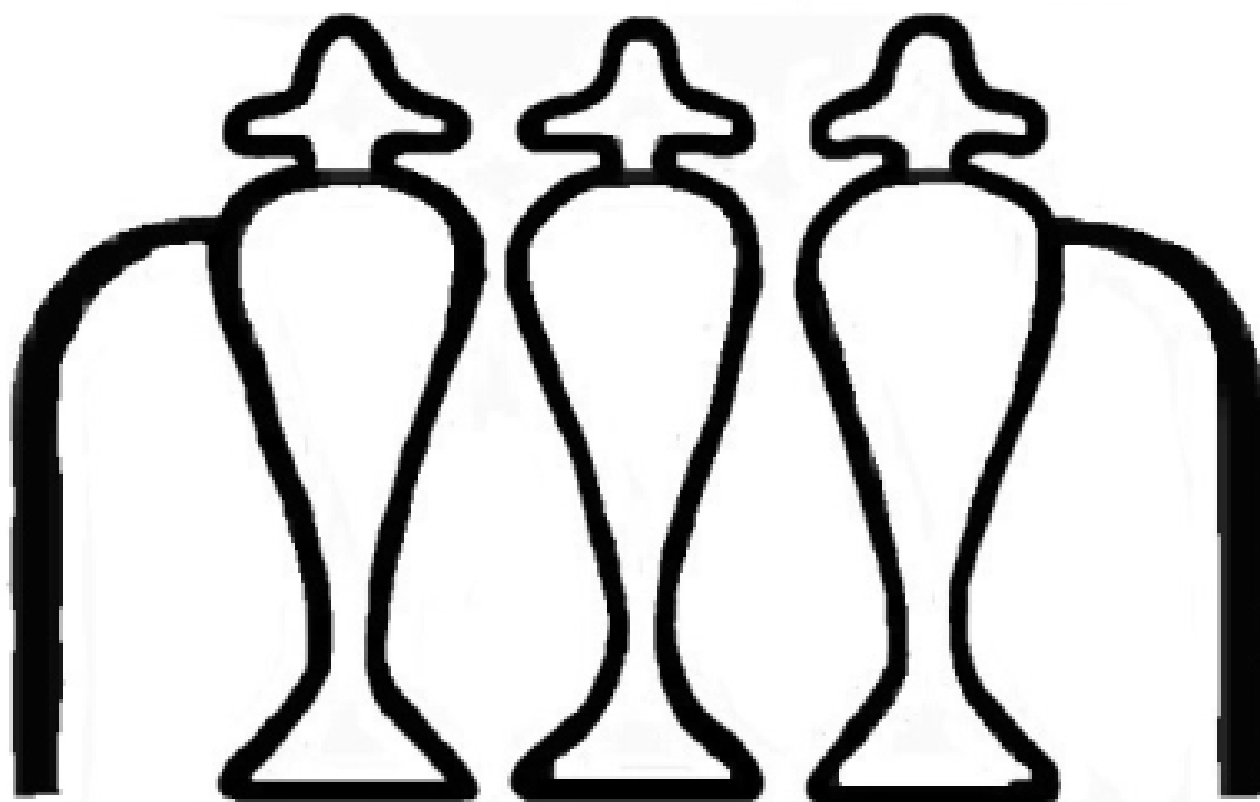


Figure 32. *Egyptian Hieroglyph 3. (Red Chapel of Hatshepsut, Karnak Temple, Luxor, Egypt.)*

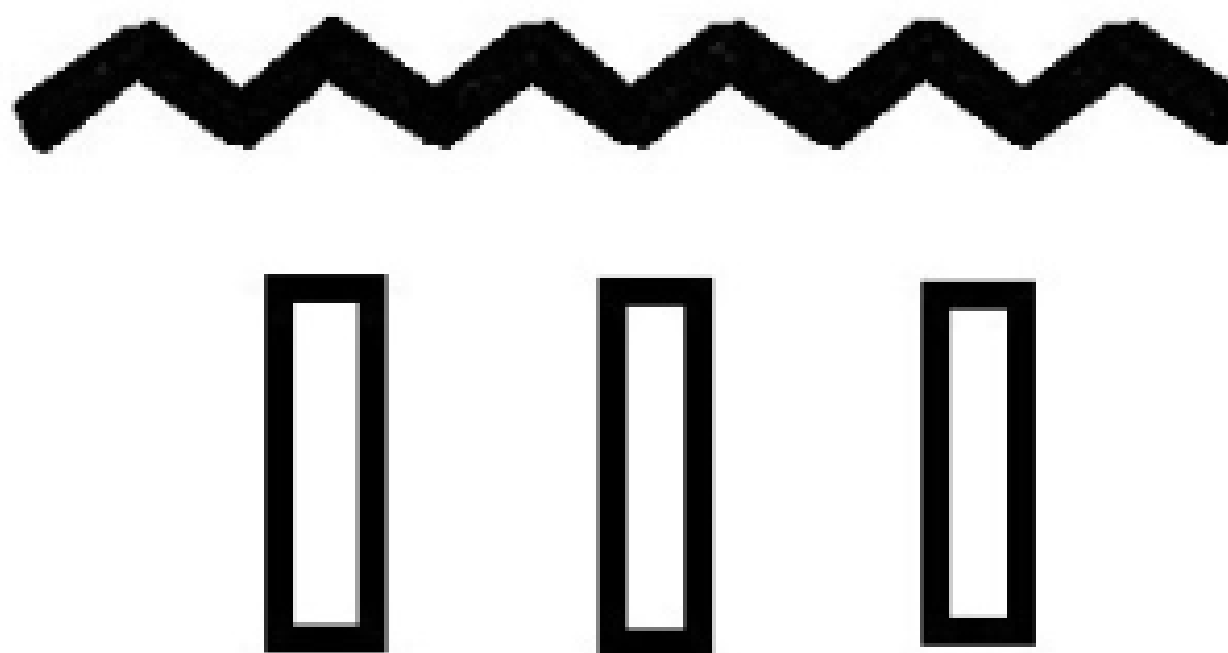


Figure 33. *Egyptian Hieroglyph 4. (Red Chapel of Hatshepsut, Karnak Temple, Luxor, Egypt.)*

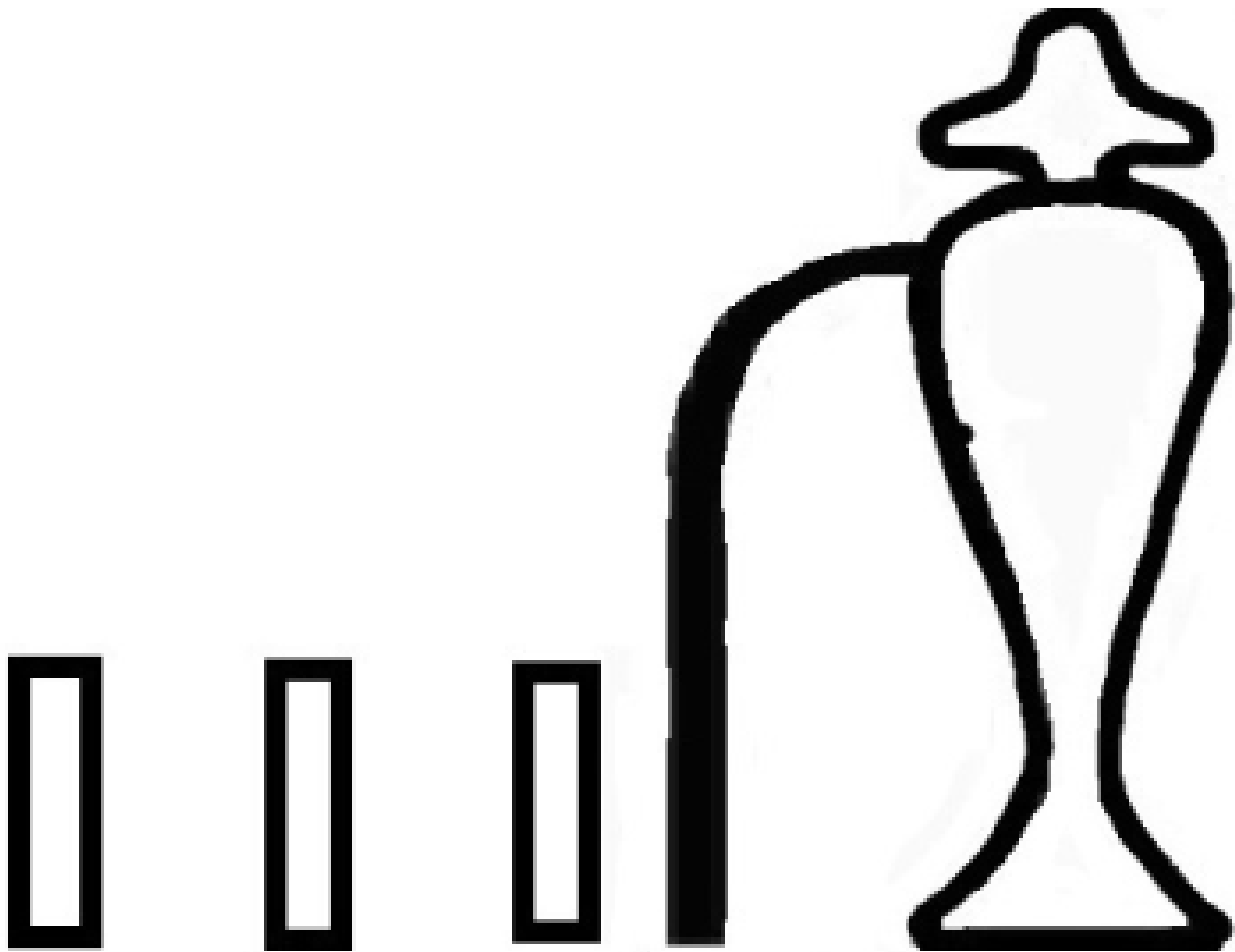


Figure 34. *Egyptian Hieroglyph 5. (Red Chapel of Hatshepsut, Karnak Temple, Luxor, Egypt.)*

Consequently, the term "Munneer," which appears in Tamil Sangam Ilakkiyam and is associated with Karikalan, is also found in Egyptian texts and is connected to Osiris. Thus, the Tamil Karikalan and the Egyptian Osiris, who have a leg defect, leadership responsibilities, and are associated with the sea, have similarities with the 'Munneer' (three waters).

Furthermore, Figures 28 and 29 depict a water bearer presenting a lamp to a ship. This Egyptian cultural practice was also observed in Tamil Nadu during antiquity (Tamil Virtual University 1995).

. Oh lord of the shores!
 Mariners fasten their old boats,
which have seen many years
with names of great gods,
tossed by waves in the ocean
with shores with rocks,
their edges cracked, not used
 any longer for work,
 to the drum-like trunks of punnai trees
 with beautiful, rich shade, growing near
 gnāzhal trees with tiny flowers.

They do not honor them with many
 fragrant smoke offerings.

Natrinai 315, Tamil Sanga Ilakkiyam.

Based on the observation that obsolete watercraft were excluded from smoke-related rituals, it can be inferred that such ceremonial honors were traditionally performed for active maritime vessels. Consequently, parallels between Tamil Sangam Ilakkiyam and Egyptianism are discernible within the context of the Munneer and its associated culture. This analysis identifies parallels between the Tamil Karikalan, and the Egyptian Osiris, both of whom are associated with this Munneer.

5. At the Bosom of Mother or Caring of Mother

The child requires maternal support. The question remains whether a distinguished warrior necessitates his mother's support. Furthermore, a question arises: does someone who requires maternal support qualify as a hero? The Tamil Karikalan, the Greek Achilles, and the Egyptian Osiris are all culturally linked to the warmth of their respective mothers. Instead of perceiving this situation as a hero seeking maternal companionship, akin to a young child, it is possible to interpret it as the child's evolution into a hero while remaining within the mother's embrace.

5.1. Caring of Mother – Tamil Karikālan

The relationship between Karikālan and his mother at the time of his ascension to the throne is detailed below (Tamil Virtual University 1995).

As a young son of Ilanchēt Chenni owning
victorious spears and many fine chariots,
King Karikālan was fierce in appearance
like angry Murukan.

He obtained rights to the throne while still in
his mother's womb, and enemies who did not
know his strength at first, bowed to him later.

The countries of those who did not obey
suffered in distress. Like the desired, hot
sun which rises over the ocean and moves
up to the wide sky, he carried his country
on his shoulders every day, since the day
he started to crawl, and protected it.

Like a fierce cub of a fine *āli* still being
breast fed, that kills an elephant in a wink
of an eye in his first hunt, with great strength
Karikālan wearing a garland sweet to behold
ruined the two Great Kings with fierce effort
at Venni – Pāndiyan wearing a strand braided with
beautiful, tender, saw-edged leaves of neem with
black branches, and Chēran wearing a tender
palmyra frond strand, on their lifted, large heads. Porunaratrappadai.129-148

This reference indicates that Karikalan assumed the throne while still in his mother's womb. Furthermore, it also mentions Karikalan's participation in warfare at a young age.

5.2. Caring of Mother – Egyptian Osiris

Egyptian sculptures illustrate the relationship between Osiris and his mother. These sculptures are presented in Figures 35 and 36 (Cauville 1990) (Walker 2001) (Wilkinson 2000).



Figure 35. Temple of Dendur, 15 B.C.

The ancient sculpture is distinctly illustrated in the accompanying sketch presented in Figure 36.

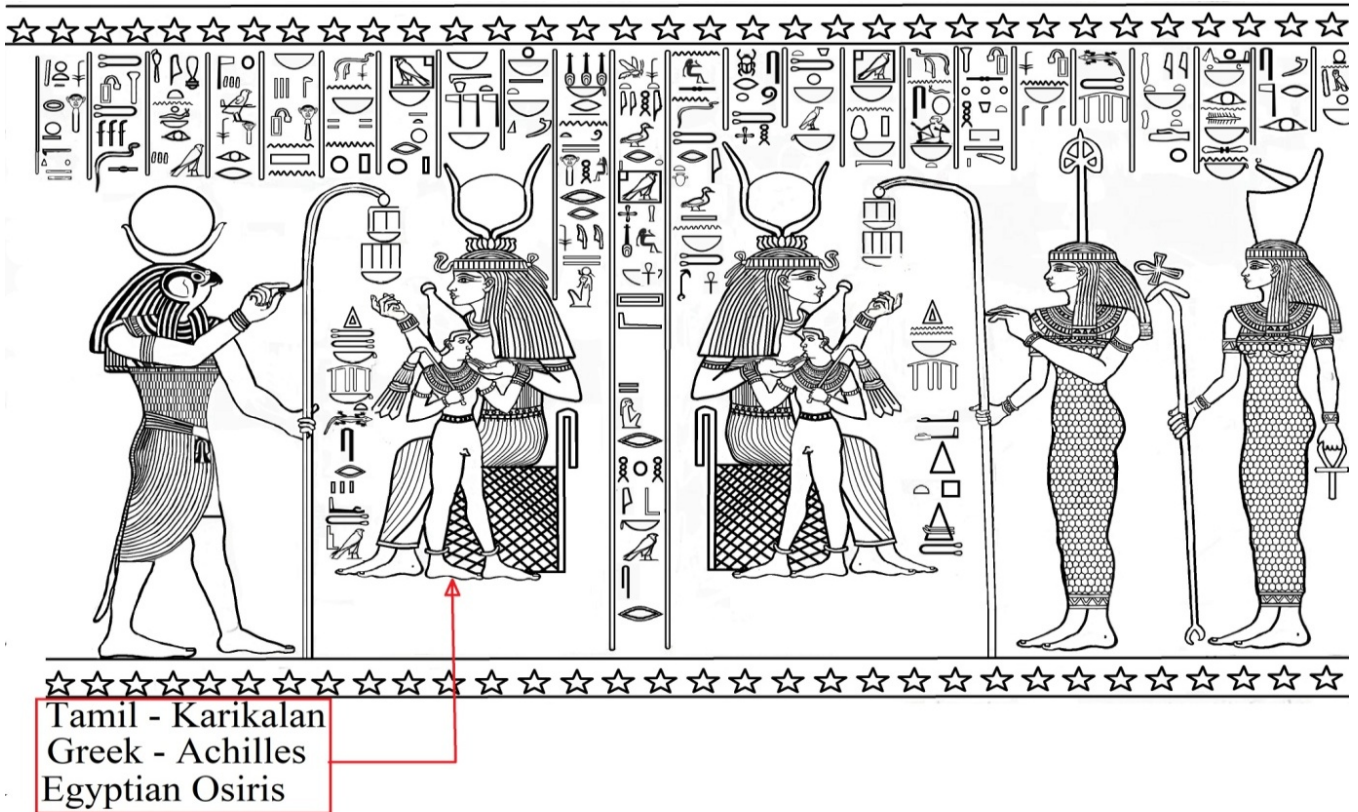


Figure 36. Illustrative sketch of the Temple of Dendur sculpture.

The little boy depicted in the figure holds a scepter. This object serves as a symbol of governing authority. The crown adorning his head signifies warfare.

This little boy is drinking milk from his mother. In this way, this scene reveals that he had already assumed power and gone to war while still a suckling from his mother. The individual holding this sceptre was previously identified as the one-legged Osiris. Furthermore, it is noteworthy that in both images, the figure with the sceptre is also depicted with an eagle face. He likely served as Osiris' protector from a young age. In this manner, the Tamil Karikalan and the Egyptian Osiris, from the very moment of nursing, share a resemblance in their association with kingship and warfare. The concept of the Greek Achilles is documented within a comparable, yet somewhat varied, context.

5.3. Caring of Mother – Greek Achilles

Achilles, renowned for his connections to the sea, the ship, and his physical impairment, is also linked to the warmth of his mother (Murray 1924).

δακρύσας ἐτάρων ἄφαρ ἔζητο νόσφι λιασθείς,
θῖν' ἔφ' ἄλδος πολιῆς, ὀρόων ἐπ' ἀπείρονα πόντον:
πολλὰ δὲ μητρὶ φίλῃ ἡρήσατο χεῖρας ὀρεγνύς:
«μητέρα ἐπεὶ μ' ἔτεκές γε μινυνθαδίον περ ἑόντα,
τιμὴν πέρ μοι ὄφελλον Ὀλύμπιος ἐγγυαλίσσαι
Ζεὺς ὑψιβρεμέτης: νῦν δ' οὐδὲ με τυτθὸν ἔτισεν:
ἢ γάρ μ' Ἀτρεΐδης εὐρὺ κρείων Ἀγαμέμνων
ἠτίμησεν: ἑλὼν γάρ ἔχει γέρας αὐτὸς ἀπούρας.»
ὥς φάτο δάκρυ χέων, τοῦ δ' ἔκλυε πότνια μήτηρ
ἡμένη ἐν βένθεσσιν ἄλδος πατρὶ γέροντι:
καρπαλίμως δ' ἀνέδυ πολιῆς ἄλδος ἡτ' ὀμίχλῃ,
καὶ ῥα πάροιθ' αὐτοῖο καθέζετο δάκρυ χέοντος,
χειρὶ τέ μιν κατέρεξε νῆπος τ' ἔφατ' ἔκ τ' ὀνόμαζε:
«τέκνον τί κλαίεις; τί δέ σε φρένας ἵκετο πένθος;
ἔξάδω, μὴ κεῦθε νόφ, ἵνα εἶδομεν ἄμφω.»
τὴν δὲ βαρὺ στενάχων προσέφη πόδας ὠκὺς Ἀχιλλεύς:
«οἶσθα: τί ἢ τοι ταῦτα ἰδυῖη πάντ' ἀγορεύω;»

But Achilles burst into tears, and withdrew apart from his comrades, and sat down on the shore of the grey sea, looking forth over the wine-dark deep. Earnestly he prayed to his dear mother with hands outstretched: "Mother, since you bore me, though to so brief a span of life, honour surely ought the Olympian to have given into my hands, Zeus who thunders on high; but now he has honoured me not a bit. Truly the son of Atreus, wide-ruling Agamemnon has dishonoured me: for he has taken and keeps my prize through his own arrogant act." So he spoke, weeping, and his lady mother heard him, as she sat in the depths of the sea beside the old man, her father. And speedily she came forth from the grey sea like a mist, and sat down before him, as he wept, and she stroked him with her hand, and spoke to him, and called him by name: "My child, why do you weep? What sorrow has come upon your heart? Speak out; hide it not in your mind that we both may know." Then with heavy moaning spoke swift-footed Achilles to her: "You know. Why then should I tell the tale to you who knows all?"

Hom. Il. 1.348–365.

Within this commentary, Achilles is observed weeping as a child and imploring his mother. The question may emerge regarding the appropriateness of such behavior. The Greek epic poem, *The Iliad*, in which this scene transpires, characterizes similar conduct as childish in other characters (Murray 1924).

Ὡς οἱ μὲν περὶ νηὸς εὖσσελμοιο μάχοντο,
 Πάτροκλος δ' Ἀχιλῆϊ παράστατο ποιμένι λαῶν
 δάκρυα θερμὰ χέων ὥς τε κρήνη μελάνυδρος,
 ἣ τε κατ' αἰγίλιπος πέτρης δνοφερὸν χέει ὕδωρ.
 (5) τὸν δὲ ἰδὼν ᾤκτειρε ποδάρκης δῖος Ἀχιλλεύς,
 καὶ μιν φωνήσας ἔπεα πτερόεντα προσηύδα:
 «τίπτε δεδάκρυσαι Πάτροκλεες, ἦύτε κούρη
 νηπίη, ἣ θ' ᾧμα μητρὶ θεοῦσ' ἀνελέσθαι ἀνώγει
 εἰανοῦ ἀπτομένη, καὶ τ' ἐσσυμένην κατερύκει,
 (10) δακρυόεσσα δέ μιν ποτιδέρκεται, ὄφρ' ἀνέληται;»

Thus then they were warring around the well-benched ship, but Patroclus drew nigh to Achilles, shepherd of the host, shedding hot tears, even as a fountain of dark water that down over the face of a beetling cliff poureth its dusky stream; and swift-footed goodly Achilles had pity when he saw him, and spake and addressed him with winged words: "Why, Patroclus, art thou bathed in tears, like a girl, a mere babe, that runneth by her mother's side and biddeth her take her up, and clutcheth at her gown, and hindereth her in her going, and tearfully looketh up at her, till the mother take her up? Even like her, Patroclus, dost thou let fall round tears."

Hom. Il. 16.1–10.

Therefore, the Tamil Karikalan, the Egyptian Osiris, and the Greek Achilles share a commonality in that they each attained power and engaged in warfare while still in the embrace of their respective mothers.

Following the discovery of Tamil inscriptions in Egypt, and in conjunction with the presence of concepts associated with "Munneer," it is evident that the analogy between Karikalan and Osiris is not based on parallelism; rather, it is rooted in influence. Similarly, the discovery of the Muziris Papyrus (Chen Siwei, 2022)—a trade agreement between Tamil and Greek merchants found in Egypt—reveals that the similarities between Karikalan, Osiris, and Achilles are not mere parallelisms, but are deeply rooted in direct cultural influence.

5.4. Prolonged Death

The Sanga Ilakkiyam (Tamil) Karikalan and Mahabharata (Sanskrit) Bhishma both are associated with the theme of 'prolonged death', where death is not immediate, but occurs over a long period of time, even though they had a deadly injury in the war.

5.4.1. Prolonged Death – Karikalan

A Chera warrior, Sengannan, engaged in combat with Karikalan. An arrow fired by Karikalan penetrated Sengannan's chest, exiting through his back. This resulted in an injury to his back. Historically, kings sustaining battle wounds on their backs were viewed as a display of cowardice, as those who retreated from battle and fled would have their backs exposed to the enemy, making them vulnerable to arrow attacks. Consequently, mortified by the wound on his back, the Chera directed his course north and abstained from food for several days before surrendering his life. This, too, resulted in a detriment to his self-regard. Despite his defeat in the battle, the king's self-respect earned him greater renown than the victor (Tamil Virtual University 1995).

O heir of a mighty man who mastered the movement
 of the wind and had his ships sail on the huge, full
 ocean! O Karikalan who owns rutting elephants!
 You who won displaying your strength in the
 battlefield near prosperous Venni town!

He is a better person than you, the king who sat
 facing north to die, ashamed of the battle wound on
 his back, who attained great fame in this world.

Puranānūru 66, Tamil Sanga Ilakkiyam.

Consequently, due to a battle-sustained wound, he remained facing north for several days without sustenance and subsequently passed away; this event is associated with the enemy king of Karikalan in Tamil Sangam literature. The same scene is also associated with Bhishma in the Sanskrit epic, the Mahabharata.

5.4.2. Prolonged Death – Bhishma

Bhishma, a figure from the Sanskrit epic the Mahabharata, sustains wounds in battle and is nearing death. At this juncture, the sun is situated in the southern direction relative to the Earth. Given the Earth's 24-degree tilt, the sun appears to face the northern hemisphere for half the year and the southern hemisphere for the other half. As the southern direction signifies a downward orientation, Bhishma, with the intention of passing away, maintains his life as the sun ascends in the north (Kisari Mohan Ganguli 2003).

I will sleep on this bed till the Sun turneth to the northern solstice! Those kings that will then come to me will behold me (yield up my life)! When the Sun on his car of great speed and unto which are yoked seven steeds, will proceed towards the direction occupied by Vaisravana, verily, even then, will I yield up my life like a dear friend dismissing a dear friend!

Section 122,
 Book 6, Bhishma Parva
 The Mahabharata

Bhishma remained upon a bed of arrows on the battlefield until his life was extinguished. This is shown in Figure 37.

Tamil - Sengannan Sanskrit - Bhishma



Figure 37. Prolonged Death.

Therefore, Cheran Chengannan, who perished at the hands of the Tamil Karikalan, and Bhishma of the Sanskrit Mahabharata share commonalities in that they both faced north and relinquished their lives after an extended period. Consequently, Karikalan and Bhishma both exhibit resemblances.

6. Twelve Killings

Killing several princes from the royal family in a single day of battle is a sign of great heroism. In this way, the Greek Achilles kills twelve Trojan princes at the same time in one battle.

As a mark of revenge for the death of his friend Patroclus, Achilles killed 12 of the Trojan Princes in the war by cutting their throats (Murray 1924).

ἄμφω γάρ πέπρωται ὁμοίην γαῖαν ἐρεῦσαι
αὐτοῦ ἐνὶ Τροίῃ, ἐπεὶ οὐδ' ἐμὲ νοστήσαντα
δέξεται ἐν μεγάροισι γέρον ἱππηλάτα Πηλεΐς,
οὐδὲ Θέτις μήτηρ, ἀλλ' αὐτοῦ γαῖα κατέξει.
νῦν δ' ἐπεὶ οὖν σέο, Πάτροκλε, μεθύστερος εἰμ' ὑπὸ γαῖαν,
οὐ σε πρὶν κτεριῶ πρὶν γ' Ἴκτορος ἐνθάδ' ἐνεῖκαι
τεύχεα καὶ κεφαλὴν, μεγαθύμου σοῖο φονῆος·
δώδεκα δὲ προπάρειθε πυρὴς ἀποδειροτομήσω
Τρώων ἀγλαὰ τέκνα χολωθείς σου κταμένοιο.
τόφρα δέ μοι παρὰ νηυσὶ κορωνίσσι κείσεται αὐτως,
ἄμφι δέ σε Τρῳαὶ καὶ Δαρδανίδες βαθύκολποι
κλαύσονται νύκτας τε καὶ ἡμέατα δάκρυ χέουσας

"...here in the land of Troy; since neither shall I come back to be welcomed of the old knight Peleus in his halls, nor of my mother Thetis, but even here shall the earth hold me fast. But now, Patroclus, seeing I shall after thee pass beneath the earth, I will not give thee burial till I have brought hither the armour and the head of Hector, the slayer of thee, the great-souled; and of twelve glorious sons of the Trojans will I cut the throats before thy pyre in my wrath at thy slaying. Until then beside the beaked ships shalt thou lie, even as thou art, and round about thee shall deep-bosomed Trojan and Dardanian women [weep]."

Hom. Il. 18.330–340.

Ὡς Τρῶες ποταμοῖο κατὰ δεινοῖο ῥέεθρα
πτῶσσαν ὑπὸ κρημνοῦς, ὃ δ' ἐπεὶ κάμει χεῖρας ἑνείρων,
ζωὺς ἐκ ποταμοῖο δυνώδεκα λέξατο κούρους
ποινὴν Πατρόκλιο Μενoitιάδῳ θανόντος·
τοὺς ἤγε θύραζε τεθηπότας ἤντε νεβρούς,
δῆσε δ' ὅπισσῳ χεῖρας εὐτμήτοισιν ἱμάσι

"Even so cowered the Trojans in the streams of the dread river beneath the steep banks. And he, when his hands grew weary of slaying, chose twelve youths alive from out the river as blood-price for dead Patroclus, son of Menoetius. These led he forth dazed like fawns [and bound their hands behind them]."

Hom. Il. 21.25–30.

In the Tamil language, Karikalan is recorded to have slain twelve princes within a single day (Tamil Virtual University 1995).

"When the greatly famous Karikālan
with intense rage and strength
crushed eleven mighty Vēlirs and two
great kings in uproarious..."
Akanānūru 246, Sanga Ilakkiam.

Therefore, the exploits of the Greek hero Achilles and the Tamil monarch Karikalan are comparable, as both figures are credited with slaying twelve princes within a single day. This is illustrated in Figure 38.

Greek- Achilles killed 12 of the Trojan Princes Tamil- Karikalan killed 12 of the Vēlirs Princes

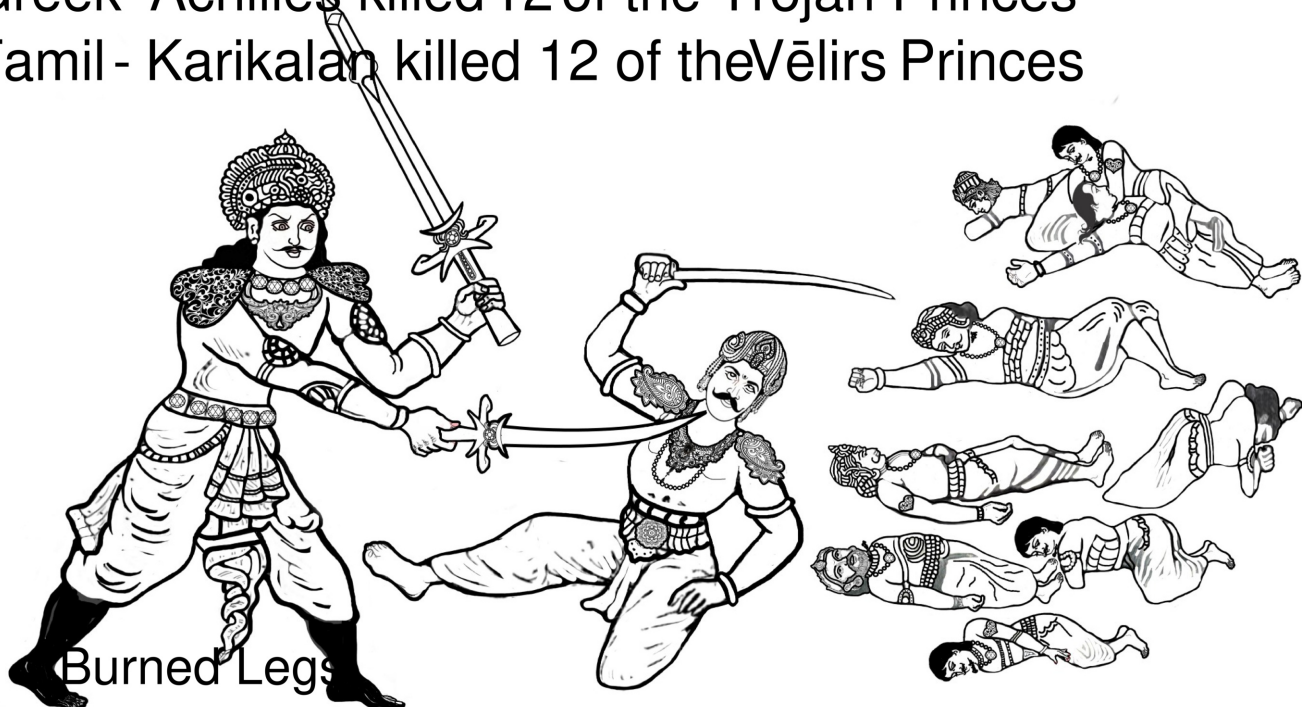


Figure 38. Death of 12 Princes.

6.1. Cross-dressing

A man dressing as a woman is not appreciated in any era or society. This peculiar event is paralleled by Achilles (Brookes More 1922) and by Arjuna, a member of the family of Bhishma.

Achilles' Nereid mother, who foresaw
his death, concealed her son by change of dress.
By that disguise Ajax, among the rest,
was well deceived. I showed with women's wares
arms that might win the spirit of a man.
The hero still wore clothing of a girl,

Ov. Met. 13.98

This character was adopted by Arjuna in the Mahabharata. When Arjuna was in heaven, he was penalized to lead the life of a lady. Then Arjuna prayed to God to forgive him and take back the punishment enforced on him. Hearing his prayers, God said that he had to live like a lady during the time he might wish. So before the beginning of the great war, during the mandatory period of the life in disguise, he hid himself from the world disguised as a lady (Brihannala) (Kisari Mohan Ganguli 2003).

Arjuna replied, "O lord of the Earth, I will declare myself as one of the neuter sex. O monarch, it is, indeed difficult to hide the marks of the bowstring on my arms. I will, however, cover both my cicatrized arms with bangles. Wearing brilliant rings on my ears and conch-bangles on my wrists and causing a braid to hang down from my head, I shall, O king, appear as one of the third sex, Brihannala by name. And living as a female..."

Section 2, Virata Parva,
Book 4, The Mahabharata.

In both these events, the heroes of both literatures lived like a lady. The situation is also identical in both literatures. Thus, the Achilles event might have been adapted to that of Arjuna in the Mahabharata.

7. Children Thrown into the River

In Greek literature, children born before Achilles are immersed in the river to gain physical strength. When that happens, those children die. Achilles is born as the seventh child.

"Thetis used to throw the children she had by Peleus into a cauldron of water, because she wished to learn where they were mortal... and that after many had perished Peleus was annoyed and prevented her from throwing Akhilleus into the cauldron."

Fragment 2, Aegimius
(from Scholiast on Apollonius Rhodius 4.816),
Greek epic, Pseudo-Hesiod, C8th BC.

"The infant Akhilleus who is now with Kheiron the kentauros and is fed by water-nymphai though he should be at your [Thetis] breast... [Peleus] had never set eyes on her [Thetis] since the night when in a rage she had left her bridal bed. They had quarrelled about the illustrious Akhilleus. He was a baby then and in the middle of the night she used to surround her mortal child with fire and every day anoint his tender flesh with ambrosia, to make him immortal and save him from the horrors of old age. One night Peleus, leaping out of bed, saw his boy gasping in the flames and gave a terrible cry. It was a foolish thing to do. Thetis heard, and snatching up the child threw him screaming on the floor. Then, passing quickly out of the house, light as a dream and insubstantial as the air, she plunged into the sea. She was mortally offended and she never returned."

Line 757, Book 4,
Argonautica, Greek epic,
Apollonius Rhodius, C3rd BC.

"Thetis used to throw the children she had by Peleus into a cauldron of water, because she wished to learn where they were mortal... and that after many had perished Peleus was annoyed and prevented her from throwing Akhilleus into the cauldron."

–Fragment 2, Aegimius,
(from Scholiast on Apollonius Rhodius 4.816),
Greek epic, Pseudo-Hesiod, C8th BC.,

When the child's mother tries to do the same to him, the father stops her. So the angry mother is separated from her child and her husband. The same event occurs in Sanskrit with Bhishma (Kisari Mohan Ganguli 2003).

"And the king, while thus enjoying himself with his wife, had eight children born unto him who in beauty were like the very celestials themselves. But, O Bharata, those children, one after another, as soon as they were born, was thrown into the river by Ganga who said, 'This is for thy good.' And the children sank to rise no more."

Section 48, Sambhava Parva, Adi Parva,
Book 1, The Mahabharata.

In this way, both of them have received this special situation as shown in Figure 39.

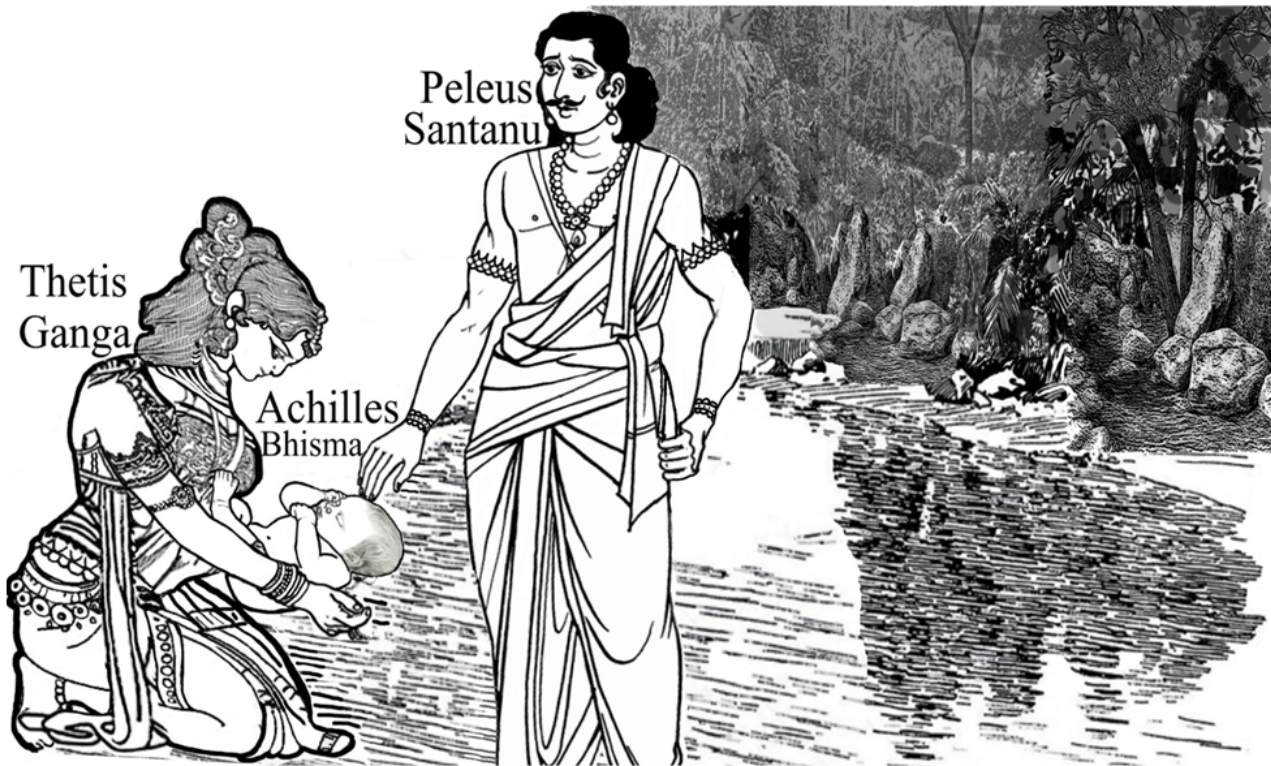


Figure 39. Baby and River.

7.1. Mother's Relation to Water

In Greek literature, the mother of Achilles was Thetis. In Indian literature, the mother of Bhishma was Ganga. In both myths, the mothers had close connections to water gods. Initially, when the babies were thrown into the water, the husband did not restrict her from doing such acts. Only at a later stage, unable to tolerate it, the husband interfered to stop such acts. So, the water Goddess left her husband, returning to the sea in the myth of Achilles and to the Ganga river in the myth of Bhishma. The matching of such deeds can be seen between the two myths which belong to two diverse and different languages and societies.

7.2. Innocent Sleeping Death and the Horse

The wooden horse of Troy or the Trojan horse is mentioned in Greek literature as the cause of the massacre of those sleeping in the castle (Samuel Butler 1900).

Then Menelaos said, "All that you have been saying, my dear wife, is true. I have traveled much, and have learned the plans and minds of many a hero, but I have never seen such another man as Odysseus. What endurance too, and what courage he displayed within the wooden horse, wherein all the bravest of the Argives were lying in wait to bring death and destruction upon the Trojans."

Hom. Od. 4.264–289.

For the Trojans they had drawn the horse into their fortress, and it stood there while they sat in council round it, and were in three minds as to what they should do. Some were for breaking it up then and there; others would have it dragged to the top of the rock on which the fortress stood, and then thrown down the precipice; while yet others were for letting it remain as an offering and propitiation for the gods. And this was how they settled it in the end, for the city was doomed when it took in that horse, within which were all the bravest of the Argives waiting to bring death and destruction on the Trojans. Anon he sang how the sons of the Achaeans issued from the horse, and sacked the town, breaking out from their ambushade.

Hom. Od. 8.505–520.

This theme finds further development in various literary works, spanning from the creation of a wooden horse to clandestine night-time assassinations (Frazer 1921).

(14) ὕστερον δὲ ἐπινοεῖ δουρεῖον ἵππου κατασκευὴν καὶ ὑποτίθεται Ἐπειῶ, ὃς ἦν ἀρχιτέκτων· οὗτος ἀπὸ τῆς Ἰδης ξύλα τεμὼν ἵππον κατασκευάζει κοῖλον ἐνδοθεν εἰς τὰς πλευράς ἀνεωγμένον· εἰς τοῦτον Ὀδυσσεὺς εἰσελθεῖν πείθει πεντήκοντα τοὺς ἀρίστους, ὥς δὲ ὁ τὴν μικρὰν γράψας Ἰλιάδα φησί, τρισχιλίους, τοὺς δὲ λοιποὺς γενομένης νυκτὸς ἐμπρήσαντας τὰς σκηνάς, ἀναθνήσκοντας περὶ τὴν Τένεδον ναυλοχεῖν καὶ μετὰ τὴν ἐπιούσαν νύκτα καταπλεῖν. (15) οἱ δὲ πείθονται καὶ τοὺς μὲν ἀρίστους ἐμβιβάζουσιν εἰς τὸν ἵππον, ἡγεμόνα καταστήσαντες αὐτῶν Ὀδυσσεύα, γράμματα ἐγχαράξαντες τὰ δηλοῦντα· τῆς εἰς οἶκον ἀνακομιδῆς Ἑλλήνες Ἀθηνᾶ χαριστήριον· αὐτοὶ δὲ ἐμπρήσαντες τὰς σκηνάς καὶ καταλιπόντες Σίνωνα, ὃς ἔμελλεν αὐτοῖς πυρσὸν ἀνάπτειν, τῆς νυκτὸς ἀνάγονται καὶ περὶ Τένεδον ναυλοχοῦσιν. (16) ἡμέρας δὲ γενομένης ἔρημον οἱ Τρῶες τὸ τῶν Ἑλλήνων στρατόπεδον θεασάμενοι καὶ νομίσαντες αὐτοὺς πεφευγῆναι, περιχαρῆντες εἰλκον τὸν ἵππον καὶ παρὰ τοῖς Πριάμου βασιλεῖσις στήσαντες ἐβουλεύοντο τί χρὴ ποιεῖν. (17) Κασάνδρας δὲ λεγούσης ἔνοπλον ἐν αὐτῷ δύναμιν εἶναι, καὶ προσέτι Λαοκόωντος τοῦ μάντεως, τοῖς μὲν ἐδόκει κατακαίειν, τοῖς δὲ κατὰ βαράθρων ἀφίεσθαι· δόξαν δὲ τοῖς πολλοῖς ἵνα αὐτὸν ἐάσωσι θεῖον ἀνάθημα, τραπέντες ἐπὶ θυσίαν εὐωχοῦντο. (18) Ἀπόλλων δὲ αὐτοῖς σημεῖον ἐπιπέμπει· δύο γὰρ δράκοντες διανηξάμενοι διὰ τῆς θαλάσσης ἐκ τῶν πλησίων νήσων τοὺς Λαοκόωντος υἱοὺς κατεσθίουσιν. (19) ὥς δὲ ἐγένετο νύξ καὶ πάντας ὕπνος κατεῖχεν, οἱ ἀπὸ Τενέδου προσέπλεον, καὶ Σίνων αὐτοῖς ἀπὸ τοῦ Ἀχιλλέως τάφου πυρσὸν ἤπτεν. Ἑλένη δὲ ἐλθοῦσα περὶ τὸν ἵππον, μιμουμένη τὰς φωνὰς ἐκάστης τῶν γυναικῶν, τοὺς ἀριστέας ἐκάλει· ὑπακοῦσαι δὲ Ἀντίκλου θέλοντος Ὀδυσσεὺς τὸ στόμα κατέσχευεν. (20) ὥς δ' ἐνόμισαν κοιμᾶσθαι τοὺς πολέμιους, ἀνοίξαντες σὺν τοῖς ὅλοις ἐξήγεσαν· καὶ πρῶτος μὲν Ἑχίων Πορθέως ἀφαλλόμενος ἀπέθανεν, οἱ δὲ λοιποὶ σειρᾷ ἐξάψαντες ἑαυτοὺς ἐπὶ τὰ τείχη παρεγένοντο καὶ τὰς πύλας ἀνοίξαντες ὑπεδέξαντο τοὺς ἀπὸ Τενέδου καταπλεύσαντας. (21) χωρήσαντες δὲ μεθ' ὅπλων εἰς τὴν πόλιν, εἰς τὰς οἰκίας ἐπερχόμενοι κοιμωμένους ἀνήρουν. καὶ Νεοπτόλεμος μὲν ἐπὶ τοῦ ἑρκείου Διὸς βωμοῦ καταφεύγοντα Πριάμον ἀνείλεν· Ὀδυσσεὺς δὲ καὶ Μενέλαος Γλαῦκον τὸν Ἀντήνορος εἰς τὴν οἰκίαν φεύγοντα γνωρίσαντες μεθ' ὅπλων ἐλθόντες ἔσωσαν. Αἰνείας δὲ Ἀγχίσην τὸν πατέρα βαστάσας ἔφυγεν, οἱ δὲ Ἑλλήνες αὐτὸν διὰ τὴν εὐσέβειαν εἶασαν.

This event is depicted in Figure 40

(14) But afterwards he invented the construction of the Wooden Horse and suggested it to Epeus, who was an architect. Epeus felled timber on Ida, and constructed the horse with a hollow interior and an opening in the sides. Into this horse Ulysses persuaded fifty (or, according to the author of the Little Iliad, three thousand) of the doughtiest to enter, while the rest, when night had fallen, were to burn their tents, and, putting to sea, to lie to off <https://www.perseus.tufts.edu/hopper/entityvote?doc=Perseus:text:1999.01.0022;text=Epitome:book=E:chapter=5&auth=perseus,Tenedos&n=1&type=place>, but to sail back to land after the ensuing night. (15) They followed the advice of Ulysses and introduced the doughtiest into the horse, after appointing Ulysses their leader and engraving on the horse an inscription which signified, "For their return home, the Greeks dedicate this thank-offering to Athena." But they themselves burned their tents, and leaving Sinon, who was to light a beacon as a signal to them, they put to sea by night, and lay to off <https://www.perseus.tufts.edu/hopper/entityvote?doc=Perseus:text:1999.01.0022;text=Epitome:book=E:chapter=5&auth=perseus,Tenedos&n=2&type=place>. (16) And at break of day, when the Trojans beheld the camp of the Greeks deserted and believed that they had fled, they with great joy dragged the horse, and stationing it beside the palace of Priam deliberated what they should do. (17) As Cassandra said that there was an armed force in it, and she was further confirmed by Laocoon, the seer, some were for burning it, and others for throwing it down a precipice; but as most were in favour of sparing it as a votive offering sacred to a divinity, they betook them to sacrifice and feasting. (18) However, Apollo sent them a sign; for two serpents swam through the sea from the neighboring islands and devoured the sons of Laocoon. (19) And when night fell, and all were plunged in sleep, the Greeks drew near by sea from <https://www.perseus.tufts.edu/hopper/entityvote?doc=Perseus:text:1999.01.0022;text=Epitome:book=E:chapter=5&auth=perseus,Tenedos&n=3&type=place>, and Sinon kindled the beacon on the grave of Achilles to guide them. And Helen, going round the horse, called the chiefs, imitating the voices of each of their wives. But when Anticlus would have answered, Ulysses held fast his mouth. (20) and when they thought that their foes were asleep, they opened the horse and came forth with their arms. The first, Echion, son of Portheus, was killed by leaping from it; but the rest let them down by a rope, and lighted on the walls, and having opened the gates they admitted their comrades who had landed from <https://www.perseus.tufts.edu/hopper/entityvote?doc=Perseus:text:1999.01.0022;text=Epitome:book=E:chapter=5&auth=perseus,Tenedos&n=4&type=place>. (21) And marching, arms in hand, into the city, they entered the houses and slew the sleepers.

Apollod. Epit. E.5. 14-21

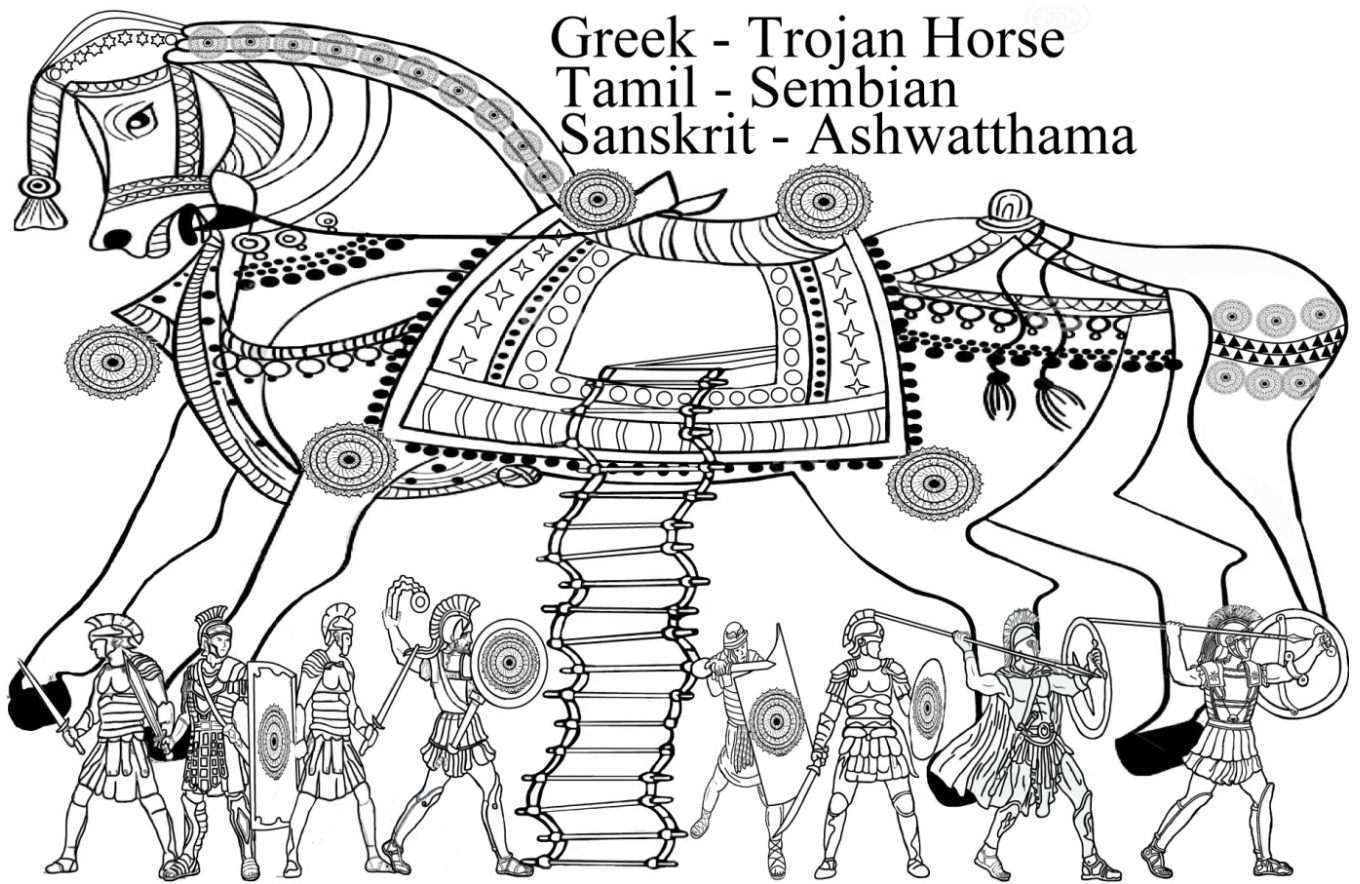


Figure 40. Wooden Horse.

There are many differences of opinion about its authenticity. In Sanga Ilakkiyam (Tamil), a king named Sembian (Pugazhendhi 2021c) is famous for his chariot made of wood and pulled by horses, as shown in Figure 41.

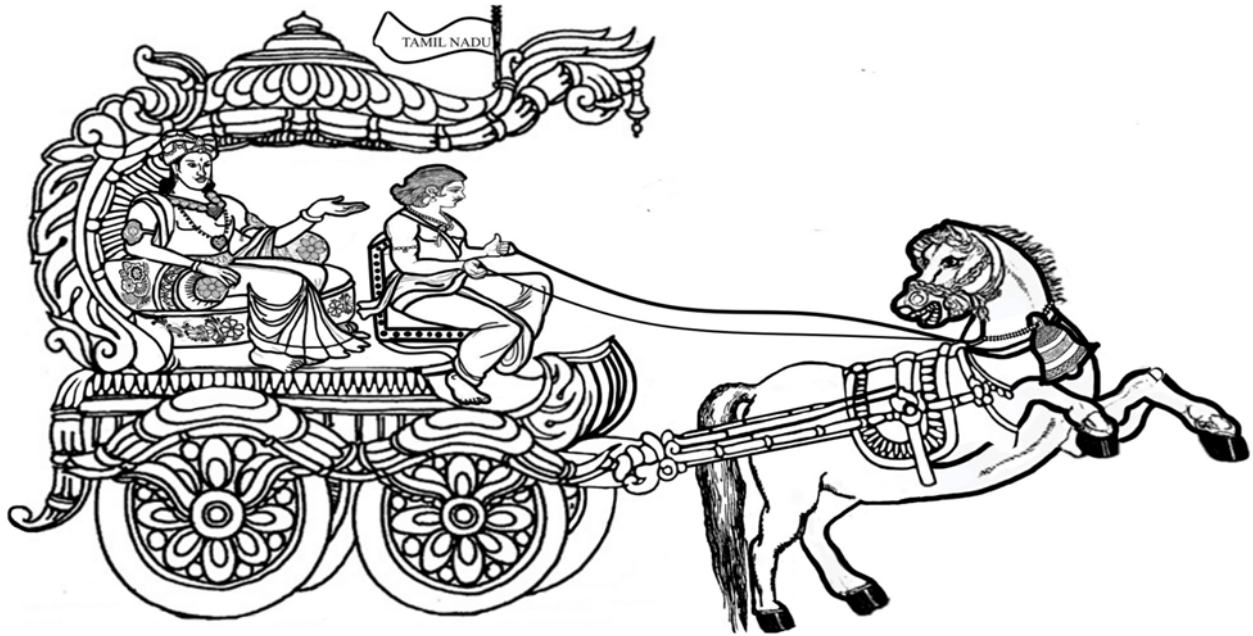


Figure 41. Sembian – Wooden Chariot.

He is referred to as 'the one who kills in the sleeping castle'. This may also refer to an individual who possesses a castle featuring swinging doors, or who has eliminated indolent soldiers. Consequently, the association between the wooden chariot and the horse, used to eliminate individuals who were either slumbering or idle, is documented within Tamil Sanga Ilakkiyam (Tamil Virtual University 1995).

In the Sanskrit epic Mahabharata, Ashwatthama kills those sleeping in the camp at night (Kisari Mohan Ganguli 2003).

The Pancalas, elated with victory, will trustfully sleep tonight, having put off their armour and in great glee, and filled with happiness at the thought of the victory they have won, and spent with toil and exertion. While sleeping at their ease during the night within their own camp, I shall make a great and terrible assault upon their camp. Like Maghavat slaying the danavas, I shall, attacking them while senseless and dead in sleep in their camp, slay them all, putting forth my prowess. Like a blazing fire consuming a heap of dry grass, I shall slay all of them assembled in one place with their leader Dhrishtadyumna! Having slain the Pancalas, I shall obtain peace of mind, O best of men!

3, Book 10, Sauptika Parva, Section 4,
The Mahabharata.

Ashwatthama means 'born to a horse'. Therefore, across these three literary works, all individuals implicated in the deaths of sleeping or idle persons within the camp or fortress are also connected to horses. Furthermore, it clarifies the intrinsic meaning of the parable within the Sanskrit Mahabharata, specifically regarding the demise of individuals at the hands of the horse-born Ashwatthama.

8. Army of Birds

8.1. Greek Ares

Ares is featured in the battle detailed within the Greek epic, the Iliad. The Greek epic, Argonautica, alludes to him having an army of birds (Seaton 1912).

(1030) Τοὺς παρανισσόμενοι καὶ δὴ σχεδὸν ἀντιπέρηθεν
 νήσου Ἀρητιάδος τέμνον πλόον εἰρεσίησιν
 ἡμάτιοι· λιὰρὴ γὰρ ὑπὸ κνέφας ἔλλιπεν αὔρη.
 ἤδη καὶ τιν' ὑπερθεν Ἀρήιον αἰσσοῦντα
 ἐνναέτην νήσοιο δι' ἥερος ὄρνιν ἴδοντο,
 (1035) ὅς ῥα τιναζάμενος πτέρυγας κατὰ νῆα θέουσας
 ἦκ' ἐπὶ οἱ πτερὸν ὄξύ· τὸ δ' ἐν λαίῳ πέσεν ὦμῳ
 δίου Ὀϊλήος· μεθέηκε δὲ χερσὶν ἐρετμὸν
 βλήμενος· οἱ δὲ τάφον περὸν βέλος εἰσορόωντες.
 καὶ τὸ μὲν ἐξείρυσσε παρεδριόων Ἐρυβώτης,
 (1040) ἔλκος δὲ ξυνέδησεν, ἀπὸ σφετέρου κολεοῖο
 λυσάμενος τελαμῶνα κατήγορον· ἐκ δ' ἐφάνθη
 ἄλλος ἐπὶ προτέρῳ πεποτημένος· ἀλλὰ μιν ἦρως
 Εὐρυτίδης Κλυτίος – πρὸ γὰρ ἀγκύλα τείνατο τόξα,
 ἦκε δ' ἐπ' οἰωνὸν ταχινὸν βέλος – αὐτὰρ ἔπειτα
 (1045) πλῆξεν· δινηθεὶς δὲ θοῆς πέσεν ἀγχόθι νηός.

They passed them by and cleft their way with oars over against the island of Ares all day long; for at dusk the light breeze left them. At last they spied above them, hurtling through the air, one of the birds of Ares which haunt that isle. It shook its wings down over the ship as she sped on and sent against her a keen feather, and it fell on the left shoulder of goodly Oileus, and he dropped his oar from his hands at the sudden blow, and his comrades marvelled at the sight of the winged bolt. And Eribotes from his seat hard by drew out the feather, and bound up the wound when he had loosed the strap hanging from his own sword-sheath; and besides the first, another bird appeared swooping down; but the hero Clytius, son of Eurytus – for he bent his curved bow, and sped a swift arrow against the bird – struck it, and it whirled round and fell close to the ship.

Argonautica 2.1030–1046.

Similar to the Greek Ares, the king of birds is also featured in Tamil Sanga Ilakkiyam.

8.2. Army of Birds – Tamil Adhiyan

Adhiyan or Adhiyaman, referenced in Tamil Sanga Ilakkiyam, is portrayed as the monarch of birds (Tamil Virtual University 1995).

...according to tradition in Pāzhi town belonging
 to Nannan owning elephants with mortar-like legs,
 and got tributes according to proper means,
 after he killed famous Athikan owning a flood-like
 large army, a friend to birds, and rejoiced.

Akanānūru 142, Sanga Ilakkiam.

Upon his fall in the battlefield, the birds he had nurtured ascended into the sky, providing shade akin to an umbrella and shielding him from the sun's rays (Tamil Virtual University 1995).

...and Nannan with great rage, hid himself,
 unable to see the murderous battlefield where birds formed a
 canopy weaving their wings together, and provided shade for the
 fallen body of Āy Eyinan, and protected it from the harsh rays of
 the bright sun in the beautiful sky!

Akanānūru 208, Sanga Ilakkiam.

Consequently, the depiction of the bird's shadow over its monarch is illustrated in Figure 42.

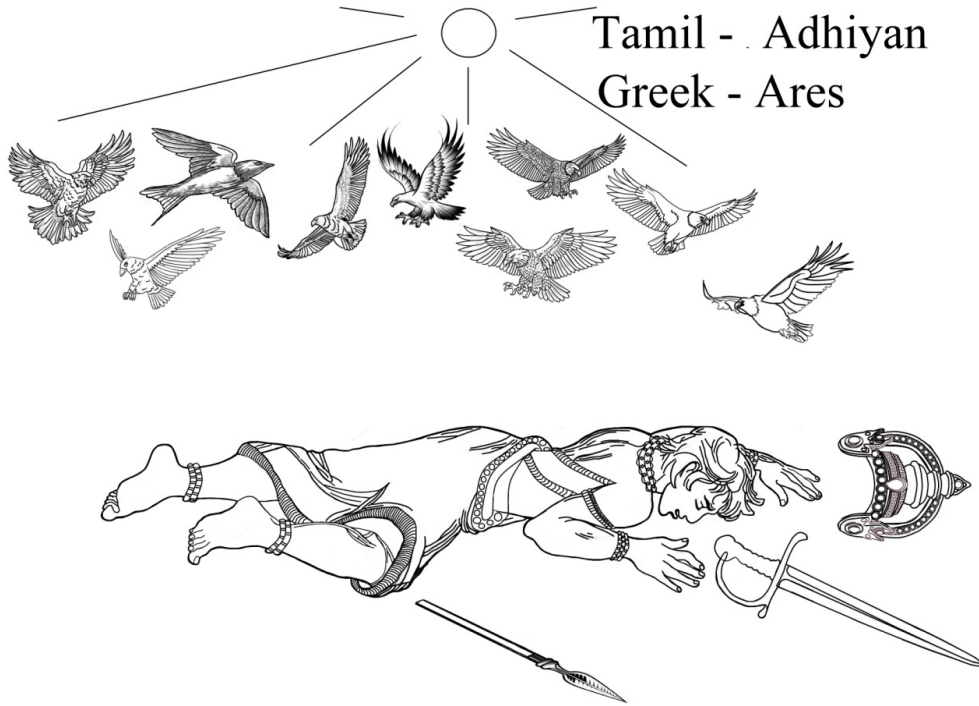


Figure 42. Shadow of Birds protecting Āy Eyinan.

Upon his demise, the birds he had raised similarly commit suicide by plunging into the flames (Tamil Virtual University 1995).

...wide shores, after collectively hovering over, and
protecting with uproar, from the sun, the body of
Āy Eyinan with Murukan-like strength, who fell
battling Mignili who was skilled in battle, who had
a large army, who seized protected forts of enemies,
and the battlefields turned red. The birds, raised by Athiyan,
Fell into the burning fire and perished.

Akanānūru 181, Sanga Ilakkiam.

As illustrated in Figure 43.



Figure 43. Suicide of birds on their monarch's demise.

Thus, the concept of the king of birds is expounded within Tamil Sanga Ilakkiyam. This Ares, referenced in Greek mythology, is also connected to deities from India (Udo Strutynski 1980). Moreover, there is a discernible phonetic similarity between the Greek name Ares and the Tamil name Adhiyan. An additional analogy warrants exploration in this context: the birds and the omens derived from them are referred to in Greek as ὄρνις, ὄρνιν (Hall 1907; Eugene 1938).

πάντα δὲ θνητοῖς ἐστὶν ἄφ' ἡμῶν τῶν ὀρνίθων τὰ μέγιστα.
πρῶτα μὲν ὥρας φαίνομεν ἡμεῖς ἥρος χειμῶνος ὀπώρας:
σπείρειν μὲν ὅταν γέρανος κρῶζουσ' ἐς τὴν Λιβύην μεταχωρῇ:
καὶ πηδάλιον τότε ναυκλήρῳ φράζει κρεμάσαντι καθεύδειν,
εἴτα δ' Ὀρέστη χλαῖναν ὑφαίνειν, ἵνα μὴ ῥιγῶν ἀποδύῃ.
ἰκτίνος δ' αὖ μετὰ ταῦτα φανεῖς ἑτέραν ὥραν ἀποφαίνει,
ἡνίκα πεκτεῖν ὥρα προβάτων πόκον ἡρινόν: εἴτα χελιδών,
ὅτε χρὴ χλαῖναν πωλεῖν ἤδη καὶ ληδάριον τι πρίασθαι.
ἐσμέν δ' ὑμῖν Ἄμμων Δελφοὶ Δωδώνη Φοῖβος Ἀπόλλων.
ἐλθόντες γὰρ πρῶτον ἐπ' ὄρνεις οὕτω πρὸς ἅπαντα τρέπεσθε,
πρὸς τ' ἐμπορίαν καὶ πρὸς βιότου κτήσιν καὶ πρὸς γάμον ἀνδρός.
ὄρνιν τε νομίζετε πάνθ' ὅσα περ περὶ μαντείας διακρίνει:
φήμη γ' ὑμῖν **ὄρνις** ἐστί, παρμόν θ' ὄρνιθα καλεῖτε,
ξύμβολον **ὄρνιν**, φωνὴν ὄρνιν, θεράποντ' **ὄρνιν**, ὄνον **ὄρνιν**.
ἄρ' οὐ φανερώς ἡμεῖς ὑμῖν μαντεῖός ἐσμεν Ἀπόλλων;

And what important services do not the birds render to mortals! First of all, they mark the seasons for them, springtime, winter, and autumn. Does the screaming crane migrate to Libya, —it warns the husbandman to sow, the pilot to take his ease beside his tiller hung up in his dwelling, and Orestes to weave a tunic, so that the rigorous cold may not drive him any more to strip other folk. When the kite reappears, he tells of the return of spring and of the period when the fleece of the sheep must be clipped. Is the swallow in sight? All hasten to sell their warm tunic and to buy some light clothing. We are your Ammon, Delphi, Dodona, your Phoebus Apollo. Before undertaking anything, whether a business transaction, a marriage, or the purchase of food, you consult the **birds** by reading the **omens** and you give this name of **omen** to all signs that tell of the future. With you a word is an omen, you call a sneeze an **omen**, a meeting an **omen**, an unknown sound an **omen**, a slave or an ass an **omen**. Is it not clear that we are a prophetic Apollo to you?

Aristophanes, Birds 708–722.

Within Tamil Sangam literature, the propitious time discerned through avian observation is also designated as 'Orthal' (Tamil Virtual University 1995).

aNagkuTai mun'n'Ir
paran'ta ceRuvin
uNagku tiRam peyarn'ta veN kal amiztam
kuTa pula marugkin uyimmAr, puL **Orttup**
paTai amaittu ezun'ta peruj cey ATavar

Men of great action analyze **omens**, and go with protective groups, taking salt, the white crystal nectar dried in the wide salt pans with water from the fierce ocean, to the west to sell, going through fearful, forked paths in the wasteland.

Akanānūru 207, Sanga Ilakkiam.

viTar mukai aTukkattu viRal kezu cULikkuk
kaTanum pUNAm; kain' n'Ul yAvAm;
puLLum **OrAm**; viricciyum n'illAm;
uLLalum uLLAm anRE – tOzi! –
uyirkku uyir annar Akalin, tam inRu
imaippu varai amaiyA n'am vayin
maRan'tu ANTu amaital valliYOrMATTE.

O friend! He is the life of my life. I cannot be away from him even for a wink of time. If he is able to forget me and capable of staying away, I will not make offerings to the victorious Kotravai in the mountain ranges with clefts and caves, nor tie ritual thread on my wrist, nor listen to **omens**, nor think about him, nor wait for good words from soothsayers.
Kurunthokai 218, Sanga Ilakkiam.

Consequently, the shared term "orthal" for bird watching in Tamil and Greek indicates a strong connection between the two communities in this domain. Similarly, the identification of Ares, the revered avian monarch in Greece, with Adhiyan, the similarly esteemed figure in Tamil tradition, further substantiates this close relationship.

Consequently, parallels to the Greek Achilles and other participants in the war in which Achilles participated can be observed in classical literature from regions geographically distant from Greece. These analogies have been disseminated within literature across various languages, encompassing narratives centered on either a single person or multiple persons who share characteristics related to a specific person. Specifically, the events concerning Achilles are disseminated among members of a single family within Indian literature, as illustrated in Figure 44.

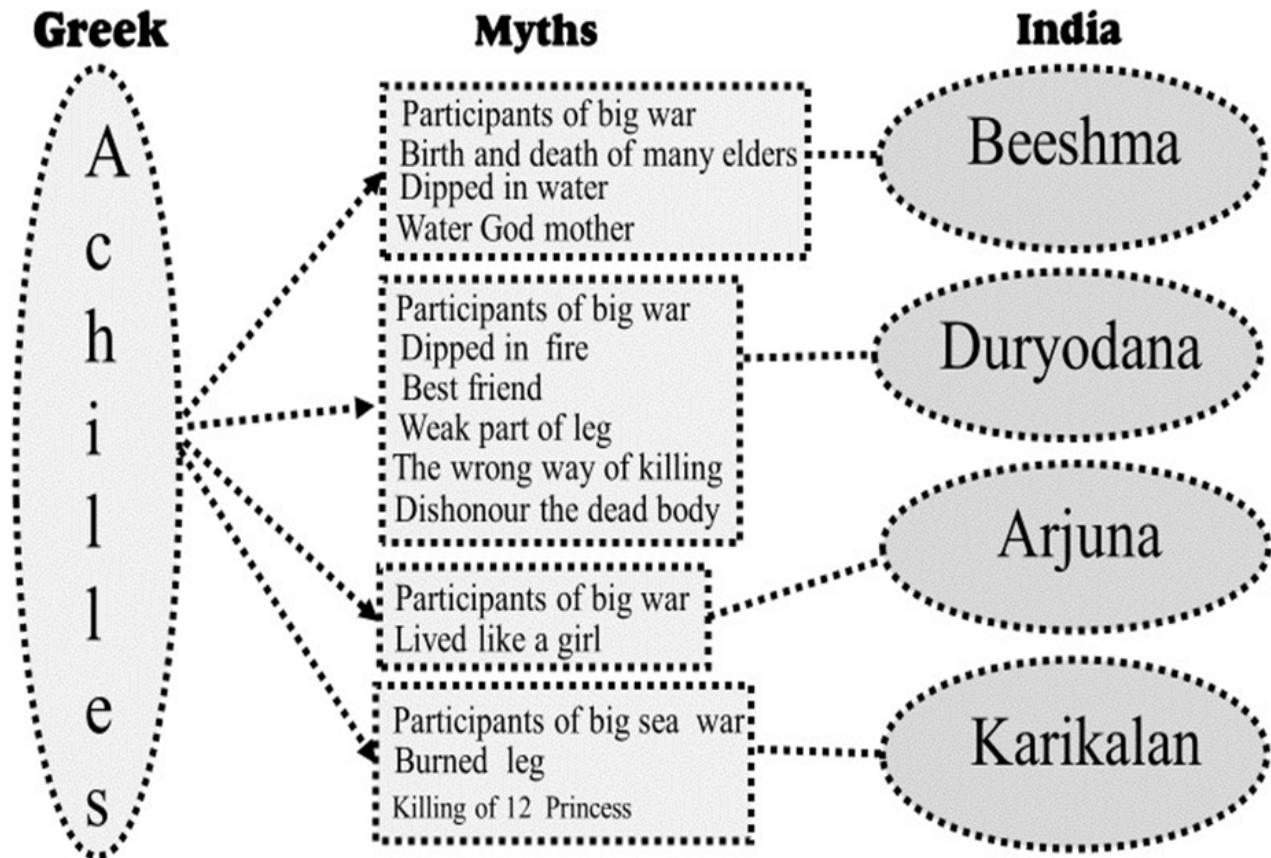


Figure 44. Distribution of Characters across myths.

The research findings arising from these concepts can be divided into two categories. Although the person responsible for the event was one, he may have been depicted as a different king in different literary languages. Or, due to the uniqueness of the event, its performance that belongs to one person may have been literaryized as belonging to another. However, these similarities confirm the connection between the literary communities. Some of these literary references are associated with historical figures such as Πανδίων (Pandion), Karikalan and Sembian. Therefore, these literary references must have arisen from these historical events. For example, the literary themes of the belief that immersing children in water will make them stronger and six children being thrown into the river by a mother goddess connected with water can be taken as a family or a community that lost six children in sea training in real history. Furthermore, these literary references, as well as historical allusions, are associated with the sea. Therefore, these compositions must have spread from one place to another through maritime communication between different communities.

9. Conclusion

The term 'ἄρχή' originating from the Greek language, encompasses various semantic nuances, including principal, beginning, leader and king, exhibiting an evolutionary trajectory in its signification. While this term appears in the ancient literature of classical languages, including Hebrew, Sanskrit, and Tamil, similar to Greek, it seems to have developed from a somewhat elevated level, as opposed to undergoing substantial semantic evolution. The concept of ἄρχον exhibits a shared linguistic origin with the Greek word ἄρχή as demonstrated in Sanskrit and Tamil literature. This has not only been a linguistic exchange between languages, but has also developed into an exchange of literary themes. Therefore, it is evident that the events related to Achilles, as referenced in Greek literature, are also present in classical languages such as Tamil, Sanskrit, Egyptian, and Hebrew. It is also possible to observe an individual resembling Achilles in one instance, while in another instance, they may bear a resemblance to someone else unrelated to Achilles. Consequently, the Greek Achilles, the Tamil Karikalan, the Sanskrit Bhishma, and the Egyptian Osiris share common themes related to the sea and foot deformities. The Tamil king Karikalan and the Egyptian king Osiris exhibit similarities with the concept of Munneer, which is not associated with the Greek hero Achilles. Similarly, the Greek Achilles and the Sanskrit Bhishma exhibit similarities in the concepts of child abandonment in a river and the mother's return to the sea, which are absent in the accounts of Tamil Karikalan and Egyptian Osiris. Consequently, a consensus regarding certain

concepts exists across these five literary traditions, while similarities are evident among particular literatures concerning other concepts. However, these literary works consistently portray the notion that individuals who have achieved mastery over the sea are physically limited in their lower limbs. Furthermore, the analogy inherent in this literary concept suggests that ancient civilizations predominantly disseminated these ideas via maritime trade routes rather than overland routes. It can be said that some of the persons mentioned in literary works also lived as historical figures. Thus this shared etymological foundation established parallels with figures such as the Greek king Achilles, the Sanskrit king Bhishma, Egyptian Osiris and the Tamil king Karikalan. Given that individuals such as Pandian, Karikalan and Sembian are historical persons, this research of the word ἀρχή functions as a study that reconstructs world history.

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La investigación en la ciencia jurídica. Erratas en su concepción, diseño y metodología. Propuestas de corrección

Research in Legal Science. Errors in its Conception, Design, and Methodology. Proposed Corrections

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Abstract

The objective of the article is to analyze the conception of scientific research, a preliminary stage in which "what is going to be investigated is investigated" and crucial definitions are determined for the projection and execution of this, an examination that is carried out focused on legal research. After a preface on science, scientific knowledge and research, I reflect on the typologies of research and characterize the type of study that, predominantly, is carried out in Legal Science. Corresponding to the type of research, its design is outlined, however, the classification that the literature uses is empathetic with empirical studies, which is why I establish a design proposal for the theoretical-legal research model. A cardinal aspect in the projection of the scientific strategy to be followed are the methods and instruments to be used to solve the scientific problem and demonstrate/argue the hypothesis, a topic on which I value erratic approaches to legal research, I value the methods most used in this type of study and I break down the methodology of application of each one, which is a significant contribution of the article.

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La investigación en la ciencia jurídica. Erratas en su concepción, diseño y metodología. Propuestas de corrección

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Abstract

El objetivo del artículo es analizar la concepción de la investigación científica, etapa preliminar en la que se “investiga lo que se va a investigar” y decantan definiciones cruciales para la proyección y ejecución de esta, examen que se realiza enfocado a la investigación jurídica. Luego de un prefacio sobre ciencia, conocimiento científico e investigación, reflexiono sobre las tipologías de investigación y caracterizo el tipo de estudio que, preponderantemente, se efectúa en la Ciencia Jurídica. En correspondencia al tipo de investigación se bosqueja el diseño de esta, empero, la clasificación que la literatura maneja es empática con los estudios empíricos, por lo cual establezco una propuesta de diseños para el modelo de investigación teórico-jurídico. Aspecto cardinal en la proyección de la estrategia científica a seguir lo constituyen los métodos e instrumentos a emplear para resolver el problema científico y demostrar/argumentar la hipótesis, tema sobre el que valoro enfoques erráticos sobre la investigación jurídica, valoró los métodos de mayor empleo en este tipo de estudio y desgano la metodología de aplicación de cada uno, lo que resulta un aporte significativo del artículo.

Keywords: *Investigación científica e investigación jurídica, Particularidades de la investigación jurídica, Tipos de investigación jurídica, Diseños de investigación jurídica, Métodos de la investigación jurídica*

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1. Introducción

En el año 2012 se publicó en México “Investigación y comunicación de la Ciencia Jurídica”. Tuvo reimpressiones en Nicaragua, Bolivia, Ecuador, Colombia y Cuba en los años siguientes. Constituyó puntal en la enseñanza de metodología de la investigación y seminario de tesis que desplegué por esos años en diversas universidades de Latinoamérica. La obra tiene una 4ta edición en el 2026.

El leitmotiv era personalizar la investigación jurídica. En esa tesitura, develaba erratas que se sostenían -y se sostienen- en la enseñanza del contenido en facultades y escuelas de Derecho; también, en no pocos libros de la materia. Durante la preparación de la primera versión, efectué una revisión acuciosa de la bibliografía. Tenía la conjetura de que se había escrito poco sobre metodología de la investigación jurídica, y ello incidía en la falta de rigor de algunos estudios y en los resultados científicos de bajo impacto que obtenían. Empero, la hipótesis fue inexacta. La problemática era otra. Alguna literatura copiaba estándares epistemológicos de otras ciencias, incongruentes con la gnoseología jurídica; otra simplificaba el quehacer científico hasta caricaturizarlo, o sustentaba postulados erróneos.

Desde entonces no he dejado de insistir en el tema y continúo en el esfuerzo de caracterizar la investigación en la Ciencia Jurídica. Este artículo se inscribe en esa intención. Abordo la fase decisiva de arranque de la investigación, esa en la que se concibe el tipo de investigación a realizar, se define el diseño y la estrategia a seguir, se conciben los métodos e instrumentos a emplear.

2. Ciencia e investigación. Precisiones imprescindibles

Bunge afirma con donaire que: “Mientras los animales inferiores sólo están en el mundo, el hombre trata de entenderlo; y sobre la base de su inteligencia imperfecta pero perfectible, el hombre intenta enseñorearse de él para hacerlo más confortable. En este proceso, construye un mundo artificial: ese creciente cuerpo de ideas llamado “ciencia”, que puede caracterizarse como conocimiento racional, sistemático, exacto, verificable y por consiguiente falible”. (1989, p. 6).

La ciencia es el conjunto de conocimientos sistematizados, estructurados y comprobables acerca de la naturaleza, la sociedad y el pensamiento; obtenidos mediante la aplicación de métodos científicos; los que en su nivel superior de sistematización se enuncian en conceptos, principios, leyes, teorías y paradigmas. Es un conjunto de ideas que se someten a la constante falsación y reconstrucción. En esa tesitura, la ciencia: I) es una construcción social que involucra a una comunidad de investigadores que acciona sobre su entorno, en un contexto institucional determinado; II) es un proceso cognitivo que se despliega apoyado en un sistema categorial y un instrumental metodológico; III) genera conocimientos que se añaden sucesivamente al saber existente.

El conocimiento es resultado de la interacción del ser humano con su entorno, de su influjo sobre fenómenos de la naturaleza y la sociedad, de la revisión del tejido teórico de la ciencia. Esa intervención se motiva por la curiosidad humana, la necesidad de explicar problemáticas, la constatación de la obsolescencia del

acervo científico. El salto cuantitativo y cualitativo que se produce en el conocimiento KUHN (1971, 33) lo identifica como “revolución científica”, momento catártico determinado por la aparición de novedades (anomalías) que no encajan en la ciencia existente (ciencia normal), a lo que continúa la búsqueda de información, la reflexión crítica, y la restauración del entramado teórico:

“

El descubrimiento de conocimiento comienza con la percepción de la anomalía; o sea, con el reconocimiento de que en cierto modo la naturaleza ha violado las expectativas, inducidas por el paradigma que rige a la ciencia normal [...] el surgimiento de nuevas teorías es precedido por un periodo de inseguridad, esta inseguridad es generada por el fracaso de la ciencia normal para dar los resultados apetecidos [...] las revoluciones científicas se consideran como aquellos episodios de desarrollo no acumulativo en que un antiguo paradigma es reemplazado, completamente o en parte, por otro nuevo [...] las revoluciones científicas se inician con un sentimiento creciente [...] de que un paradigma existente ha dejado de funcionar adecuadamente [...]. (1971, pp. 93, 114, 149)

Quivy y Campenhoudt (2005, p. 50) afirman que el quehacer investigativo presupone la siguiente dinámica: 1) observación-descripción, 2) contextualización, 3) recolección-procesamiento, 4) comprobación-transformación, 5) modelación-construcción. La observación-descripción implica el acercamiento a la problemática, la caracterización del fenómeno a estudiar, el posicionamiento del camino científico a seguir. La contextualización supone enmarcar el estudio en el sistema de conocimiento existente y la configuración de un marco teórico como plataforma. La recolección-procesamiento involucra recoger datos, procesarlos, decantar información e interpretarla. La comprobación-transformación significa la obtención de conocimiento que solucione el problema. La modelación-construcción es la estructuración y difusión del conocimiento obtenido.

El conocimiento científico no brota espontáneamente, no emerge de la chistera por mágicos malabares; se obtiene, indefectiblemente, mediante la búsqueda controlada, a través de la investigación formalizada, metódica, sistemática, analítica, crítica, objetiva, creativa.

¿De dónde recibe la ciencia jurídica las demandas para la investigación?

De las problemáticas sociales, de las contradicciones científicas que se presentan cuando el andamiaje conceptual-teórico de una disciplina es insuficiente para explicar un fenómeno socio-jurídico, de la evidencia de que un fragmento del sistema normativo precisa reformarse para adecuarse a la realidad.

La respuesta del Derecho no es inmediata. Se requiere la saturación de hechos y la acumulación de anomalías; que se perciba la insuficiencia del marco teórico, los déficits de las normas existentes; transitar por la fase de análisis crítico en el que la academia asienta reflexiones novedosas y la judicatura genera rupturas argumentativas; que el poder político procese la demanda y revise las normas necesarias.

3. Gestar la investigación. El accionar “tras bambalinas”

En la investigación científica se suceden tres fases (Barriga, 1974, p. 58; De Landsheere, 1971, p. 7; Villabella, 2026, p. 6): I) Etapa de

mesa o de abstracción. Se establece el diseño de investigación y se proyecta esta; II) Etapa de trabajo, heurística o de comprobación: Se ejecuta la investigación. Se elabora el marco teórico, aplican los métodos científicos, recopilan y procesan datos, etc.; III) Etapa de redacción y comunicación. Se redacta el informe y presentan los resultados en el gremio científico.

Previo a la etapa de mesa, empero, existe un momento invisibilizado por la literatura, sin embargo, de capital importancia; me refiero a la fase en la que se concibe o gesta la investigación. En la gestación de la investigación se escudriña el horizonte científico, se indaga sobre los nudos problemáticos de la disciplina, se jerarquizan estos, se perfila el objeto y la idea de investigación. En otras palabras, *se investiga lo que se pretende investigar*. En este periodo se despliegan seis acciones: 1) comprender la problemática científica; 2) delimitar del objeto de estudio; 3) explorar el objeto de estudio; 4) perfilar de la idea de investigación; 5) formular la pregunta de trabajo; 6) proyectar la dimensión de la investigación a realizar.

La problemática científica trasluce una contradicción del conocimiento que se suscita cuando este no puede explicar un fenómeno o cuando el marco conceptual-teórico de la ciencia es rebasado (anomalía en la ciencia). En ocasiones la problemática científica no se percibe con nitidez, se vislumbra una situación problemática en la que se entrelazan varias problemáticas, un sinnúmero de preguntas. Es necesario entonces, adentrarse en ese tejido, desagregarlo, individualizar las problemáticas, clarificarlas, aislar la que investigará, comprenderla.

El objeto de investigación es lo que centrará la investigación: problemática socio-jurídica; sujetos; institución jurídica; concepto, teoría, principios; normas jurídicas. Leyva y Guerra (2020, p. 254) apuntan que es la materia que centra la actividad del investigador, en los marcos de la cual esta tiene lugar y guarda con él analogía estructural-funcional.

Explorar el objeto de estudio es la acción de búsqueda de información sobre este a fin de perfilarlo, ubicarlo en la problemática científica, detectar si se ha estudiado con anterioridad. En el lenguaje de la aviación se utiliza el vocablo *approach* para significar la visualización y exploración que el capitán de la aeronave realiza de la pista antes de aterrizar. La exploración constituye el *approach* a la problemática científica. Posibilita: 1) que el investigador rebase las fronteras de sus conocimientos y distinga entre los déficits de este y las problemáticas reales de la disciplina; 2) delimitar el objeto de estudio; 3) evaluar si es pertinente científicamente; 4) establecer el estado de la problemática está: se ha investigado y no hay nada que aportar; se ha investigado, pero no está agotada; no se ha investigado.

La idea de investigación es resultado de lo anterior. Refleja el objeto de estudio contextualizado. Expresa la identificación por el investigador de la necesidad de abordarlo (justificación) y la concepción de cómo solucionar la problemática (resultados). Es una ecuación que expresa *qué se investiga, por qué, cómo se estudiará, y para qué*. La idea de investigación es acertada si: 1) el objeto a estudiar está delimitado (concesión); 2) se incardina en una problemática real (pertinencia científica); 3) la propuesta que se pretende demostrar/ argumentar es lógica y en correspondencia con las tendencias científicas (factibilidad científica); 4) esboza un ángulo en el que se realizaran aportes (novedad y utilidad); 5) el estudio a realizar es factible desde el punto de vista económico, de tiempo y de experticia del investigador (sostenible).

La pregunta de trabajo es una interrogación que refleja de manera anticipada el meollo de la problemática a investigar. Se inscribe en un camino de cuestionamientos que transita de enunciados difusos y generales a otros concretos. En el substrato

del quehacer científico se encuentra la curiosidad del investigador, que parte de cuestionamiento generales y difusos, y progresa a preguntas delimitadas.

La dimensión de la investigación estriba en definir el tipo de investigación a realizar (teórica, empírica, mixta), el enfoque que tendrá en caso de ser empírica (cualitativa o cuantitativa), y su alcance (exploratoria, descriptiva, correlacional, explicativa).

Diseñar la investigación y formalizarla en un proyecto, solo es posible cuando se ha cursado esta de búsqueda de información, comprobación, introspección.

4. Naturaleza de la investigación jurídica. Corrección de equívocos

Existen diversas clasificaciones sobre las tipologías de investigación (Ander-Egg, 1990, p. 99; Achig, 1986, p. 56; Sabino, 1996, p. 146; Arias, 2006, p. 21). La taxonomía más frecuente es la siguiente:

1. Investigación básica o teórica, empírica o de campo, y mixta. La última combina ambos paradigmas.
2. Investigación empírica con enfoque cuantitativo, cualitativo, y multimodal. La última conjuga ambos enfoques en un mismo proceso y rebasa la antítesis cuantitativo-cualitativo. Se expresa en tres variantes: a) metodología de dos etapas (se desarrollan dos investigaciones en diferentes tiempos, cada una con un enfoque distinto, al finalizar se analizan e interpretan los resultados); b) metodología de enfoque dominante (se desarrolla uno de los enfoques, pero en determinada variable se aplica un estudio desde la otra perspectiva); c) metodología mixta (se desarrollan ambos enfoques a la vez, lo que supone un alto grado de integración y complejidad).
3. Investigación exploratoria, descriptiva, correlacional y explicativa.

La determinación del tipo de investigación a realizar, como paso previo a la formulación del proyecto, es decisivo para la coherencia de este con la problemática científica a enfrentar. Su delimitación condiciona la formulación del problema científico, la hipótesis y los objetivos; la selección de los métodos científicos; el diseño de la estrategia; etc. Por la importancia que tiene para lo que se analizará y en el propósito de revisar algunas ideas prevalecientes, es perentorio caracterizar la investigación teórica, empírica, cuantitativa y cualitativa.

La investigación teórica se caracteriza por los siguientes aspectos: 1) aborda objetos que son representación simbólica de la realidad, conceptos, nociones, constructos, categorías elaborados por el hombre para aprehender esta; 2) adopta un enfoque lógico-racional; 3) trabaja en el marco teórico de una ciencia; 4) la relación del sujeto investigador no es con el objeto real, sino con la representación semiótica de este; 5) opera con datos intangibles, especulativos; 6) parte de un proyecto ordenado estructurado, pero flexible porque no opera con variables sobre las que se requiere control; 7) plantea hipótesis teóricas, conformadas por un predicado indeterminado, no medible, que establece una proposición argumentativa/demostrativa; 8) emplea métodos que operan a nivel del pensamiento abstracto (análisis, síntesis, comparación, abstracción, concreción, deducción, inducción; 9) no requiere de muestra; 10) puede emplear información estadística o capturar directamente datos a través de encuestas y entrevistas, con el fin de complementar o enriquecer análisis

teóricos, pero ello no determina la naturaleza del estudio; 11) el propósito es perfeccionar la teoría existente, revisarla, afinarla, reconstruirla; 12) la fiabilidad de las conclusiones se logra a partir de una exhaustiva operacionalización de los conceptos, la triangulación teórica (validez de constructo), la corroboración de que las tesis que se sostiene sea continuadora de paradigmas o argumenten su renovación (validez de criterio), y que tengan trascendencia para contextos similares (validez externa); 13) constituyen investigaciones de bajo costo porque la “materia prima” con la que trabaja es información contenida en fuentes publicadas.

La investigación empírica tiene los siguientes rasgos: 1) aborda objetos factuales, fenómenos de la naturaleza, la sociedad y el pensamiento con los que interactúa; 2) puede adoptar un enfoque objetivo derivado de un paradigma positivista, o un enfoque interpretativo derivado de un enfoque humanista; 3) se fundamenta en el marco teórico de una disciplina a partir del que formula hipótesis que procura demostrar; 4) el sujeto investigador se relaciona directamente con el objeto; 5) opera con datos objetivos, cuantificables, o con datos subjetivos, cualitativos; 6) el proyecto puede variar de estructurado y cerrado a emergente y flexible, en dependencia del enfoque investigativo; 7) trabaja con diferentes tipologías de hipótesis que establecen relación entre variables (en el enfoque cuantitativo se parte de hipótesis a verificar o probar, en el cualitativo puede que estas terminen de formularse en el contexto del estudio); 8) emplea métodos que posibilitan la interacción sujeto-objeto (observación, experimento, análisis de contenido, estudio de casos, fenomenológico, hermenéutico, etnográfico, etc.); 9) requiere de muestra (el tamaño depende del fenómeno que se estudia, la complejidad y heterogeneidad del universo, y del análisis cualitativo o cuantitativo a realizar; 10) los datos que se capturan requieren procesarse (ordenarse, estandarizarse, analizarse, interpretarse), para lo que se emplean procedimientos de la estadística descriptiva e inferencial; 11) el desiderátum varía en relación a si el propósito es caracterizar el fenómeno que se estudia y precisar la incidencia de determinadas variables, o describirlo y comprenderlo; 12) la fiabilidad de las conclusiones se obtiene a partir de que los métodos e instrumentos resulten confiables (sean adecuados para obtener la información que se busca, arrojen resultados estables y consistentes), y su aplicación proporcione validez (externa, interna, de constructo, de contenido, de conclusión estadística, de criterio); 13) son investigaciones de mayor costo, derivado de la selección y trabajo con la muestra, la realización de prueba piloto de los métodos e instrumentos, la aplicación de estos, y el procesamiento de los datos.

La investigación empírica con enfoque cuantitativo abraza el paradigma positivista que sostiene el abordaje de los fenómenos de manera racional, despojado de subjetividades, con precisión estadística, la generalización de las conclusiones. Características: 1) asume que existe una realidad que es posible conocer objetivamente, a partir de dominar el objeto a través de sus propiedades y magnitudes perceptibles; 2) enfoque objetivo, interesado en las cuestiones relevantes y en los volúmenes de información; 3) trabaja desde un punto de vista externo del objeto y orientado a los resultados; 4) la relación sujeto-objeto es mediata, neutral, impersonal; 5) trabaja con variables medibles, los datos que captura son sólidos, representados numéricamente, su procesamiento busca la estandarización; 6) puede aislar el objeto de estudio y manipular controladamente variables; 7) el proyecto de investigación es estructurado y cerrado, concreta un problema, delimita hipótesis y estructura objetivos; 8) parte de un marco conceptual, genera

teoría a partir de la comprobación de las hipótesis planteadas; 9) emplea métodos como la observación, el experimento, la encuesta, y técnicas de la estadística inferencial y descriptiva; 10) se sustenta en un razonamiento hipotético y deductivo; 10) se basa en muestras probabilísticas, estadísticamente representativas del universo o población que investiga; 11) su ideal es explicar la causalidad de lo que estudia, correlacionar variables, medir, demostrar, establecer magnitudes, definir patrones, generalizar las conclusiones (Hernández et al., 2014, p. 533; Abero et al., 2015, p. 48; Pierdan, 2010, p. 103; Luján, 2010, p. 213).

La investigación empírica cualitativa se inspira en un paradigma humanista, interpretativo, naturalista, constructivista, fenomenológico (Flick, 2012, p. 15), entiende que los fenómenos que estudia están condicionados histórica y culturalmente, son el resultado de la acción humana. Rasgos: 1) dirige su atención a aspectos no observables ni susceptibles de cuantificación, conoce de realidades subjetivas; 2) enfoque humanista, capaz de atender los detalles y manejar las situaciones conflictivas; 3) trabaja desde un punto de vista interno del objeto, orientado al proceso; 4) la relación sujeto-objeto es intimista, explícita, lo que puede introducir sesgos que permean los resultados; 5) los datos que maneja son ideográficos, singulares, ricos en matices porque reflejan incertidumbres, emociones, dilemas; 6) aborda el objeto desde una perspectiva natural y holística, en la dinámica de su complejidad, en el contexto de sus relaciones, sin interrumpir estas; 7) el proyecto de investigación es emergente y flexible, en dependencia de lo que estudia y la información disponible, puede no prefigurar el problema científico ni la hipótesis, sino generar estos progresivamente; 8) parte de escasos antecedentes en ocasiones, por lo que construye teoría a partir de los resultados que obtiene; 9) emplea métodos como la observación participante, la entrevista semiestructurada, la historia de vida, el análisis de contenido, la hermenéutica, los grupos focales, el estudio de casos; 10) se sustenta en un razonamiento inductivo; 11) utiliza muestras reducidas, intencionadas, casos-tipos y contextos relevantes; 12) pretende conocer y describir las experiencias de los sujetos, interpretarlas, revelar las motivaciones subyacentes, tematizar conflictos (Urrutia y González, 2003, p. 362; Martínez, 2006, p. 143; Ruedas et al., 2009, p. 629; Katayama, 2010, p. 42; Penalva et al., 2015, p. 13).

La investigación exploratoria aborda un objeto poco o nada estudiado. Su propósito es acercarse al fenómeno, familiarizarse con la problemática, diagnosticarla, recopilar información, generar hipótesis. Casi nunca constituye un fin en sí mismo, sino la base para subsiguientes investigaciones. La descriptiva recopila y ordena datos, los procesa y sistematiza información del objeto que estudia con el propósito de caracterizarlo. La correlacional establece relación entre variables (independiente, dependiente, interviniente) y categorías, discerniendo patrones y esbozando vínculos de causalidad. Precisa el grado en el que uno o varios factores inciden en un suceso o fenómeno. La explicativa busca comprender las causas que motivan el fenómeno que se estudia, explicarlo (Selltiz et al., 1965, p. 59).

¿Cuál es el tipo de investigación pertinente para la Ciencia Jurídica?

No existe un tipo único o ideal. Las tipologías descritas no son exclusivas de un área del conocimiento, aunque algunas concuerden más con las ciencias naturales y aplicadas, y otras con las ciencias sociales. Los estudios jurídicos, en particular las que se realizan en la academia como parte del posgrado, son preponderantemente de tipo teórico, lo que no niega que

el Derecho aborde problemáticas desde una tipología empírica cuantitativa o cualitativa.

El predominio del positivismo científico provocó que el modelo prevaleciente fuese el empírico-cuantitativo, asociado a volúmenes de información, los análisis estadísticos, la expresión porcentual de los resultados, la generalización de estos. La investigación cualitativa alcanza reconocimiento en la segunda mitad del siglo XX. La investigación teórica empero, permanece subestimada, sus resultados no son considerados como “ciencia verdadera”. En consecuencia, no pocos científicos sociales, aguijoneados por la mirada despectiva desde el Olimpo por las “ciencias duras”, incorporan en su quehacer códigos de estas y matematizan sus razonamientos, olvidando que los objetos de su saber son los sistemas y procesos sociales en los que el hombre se encuentra inserto, lo que condiciona su naturaleza subjetiva, ideográfica, irreplicable, mutable, multicausal.

En esa invisibilidad, se menciona que la investigación jurídica es de tipo cualitativo. Es un error. Si se aborda un concepto, una teoría o una institución jurídica, se está realizando una investigación teórica. En esta pueden aplicarse, no obstante, métodos empíricos para la recopilación de información o el análisis cualitativo de determinadas cuestiones. *Exempli gratia*, realizar entrevistas a jueces, aplicar encuestas, valorar casos representativos, analizar el contenido de documentos jurídicos, interpretar la estadística judicial, etc.; empero, ello no desvirtúa el modelo de análisis teórico porque el propósito no es la estandarización de los datos, sino su valoración en función de tesis, en pos de razonamientos argumentativos. Los datos obtenidos se emplean para ilustrar, robustecer análisis, obtener una validación cruzada de conclusiones, etcétera.

En la investigación jurídica debe tenerse presente que:

1. Los objetos que estudia son fenómenos en los que el hombre se encuentra inserto, resultado de su creación. El investigador es sujeto y objeto, ello le impregna subjetividad.
2. El investigador interpreta los resultados desde sus códigos filosóficos, epistémicos, culturales. Por ende, los análisis pueden contener sesgos.
3. Los fenómenos sociojurídicos tienen que abordarse inmersos en la red de interacciones sociales, económicas y políticas; dimensiones desde los que recibe influencia.
4. Los contextos de estudio son histórico-concretos. Existe un caudal teórico universal, pero las problemáticas jurídico-dogmáticas son específicas de un país, región, comunidad.
5. Los fenómenos sociojurídicos son multicausales, sinérgicos, holísticos; de allí su complejidad.

Algunos autores (López, 2005, p. 52; Witker, 1995, p. 10) señalan también como tipologías de las investigaciones jurídicas la histórica, comparativa, proyectiva, o propositiva. Expresado de esa manera es inadecuado. Lo histórico o comparativo son matices que adquiere el estudio en relación a si se realiza un análisis longitudinal o transversal del objeto. La distinción entre proyectivo y propositivo es falaz porque toda investigación debe culminar con resultados y propuestas, de lo contrario no científica.

5. Diseños para la investigación jurídica. Subsanar una laguna

Toda investigación requiere proyectarse, diseñarse y planearse. Diseño, proyecto y protocolo de investigación se suelen utilizar como sinónimos, aunque en puridad no lo son (Villabella 2026, p. 42; Samaja, 1993, p. 202).

El diseño es el esquema de trabajo teórico-metodológico que se traza para abordar la problemática científica. Esboza el metabolismo cognitivo del ejercicio científico. Implica delimitar el problema científico, concebir la hipótesis a probar/demostrar/argumentar, definir objetivos, proyectar los métodos a emplear. Supone una estrategia para operar con las fuentes de información, capturar los datos, procesarlos.

El proyecto es el documento de licitación de la investigación. Contiene el diseño y otros aspectos metodológicos que van desde la fundamentación de la investigación hasta los resultados esperados. Permite el control por la institución que la encomienda o financia. Es un instrumento del sistema de organización de la ciencia del país y de la institución.

El protocolo es el instrumento que proyecta y planifica cronológicamente la ejecución del estudio. Además de los aspectos metodológicos citados, plasma el presupuesto, el esquema de gastos por etapas, las fuentes de financiamiento, la identificación de los clientes o usuarios, los acuerdos o convenios de introducción de los resultados, las publicaciones a realizar, etcétera.

La clasificación de diseño de investigación más citada, considera únicamente a la investigación empírica: diseños experimentales y no experimentales (Maletta, 2009, p. 152; Sánchez et al., 2018, p. 53; Jiménez y Ramírez, 2011, p. 41; Yuni y Urbano, 2006, p. 8). El diseño experimental (en laboratorio o el campo) funciona para evaluar la incidencia de determinadas variables en un fenómeno, para ello, manipula de manera controlada una o más variables independientes y mide su efecto en la variable dependiente. Su fin es establecer correlaciones y explicar. Puede adoptar la modalidad preexperimental, experimental, cuasiexperimental (Hernández et al., 2014, p. 126; Campbell y Stanley, 1966). El diseño no experimental o ex post facto opera para abordar un fenómeno en su entorno natural, sin manipular variables. Puede adquirir la modalidad transversal y longitudinal (de tendencia, de evolución o cohorte, de panel).

¿Qué tipo de diseños requiere la investigación teórica jurídica?

La depreciación del estudio teórico conlleva a que no se hable de diseños para este paradigma. La investigación teórica requiere, igualmente, de una concepción metodológica para abordar el problema y un enfoque argumentativo para solventar la hipótesis o idea a defender (Cobos y González, 2020, p. 147; Witker, 2021, p. 943). Identifico, entre otros, cuatro prototipos de diseños para la investigación teórica:

1. Diacrónico: se aborda conceptos, teorías, instituciones jurídicas, en un lapso determinado; con el propósito de suministrar una perspectiva evolutiva, general, evidenciar mutaciones, y generar/revisar un enfoque iusfilosófico.
2. Sincrónico: se acomete el estudio de conceptos, constructos, instituciones jurídicas, en una dimensión espacio-temporal; con la intención de revisar/replantear estas.
3. Metateórico: se realiza el estudio holístico, crítico, de un sistema teórico-jurídico, con la pretensión de fundamentar la deconstrucción/construcción de un paradigma.

4. Comparativo: se enfrenta el examen comparado de conceptos, principios, hipótesis, instituciones jurídicas, en el entorno interno de un país (federal) o externo (regional), para establecer una matriz que oriente la reformulación y restructuración.

6. Métodos para la investigación jurídica. Rectificaciones y procedimientos de aplicación

Con agudeza el citado Bunge expone la centralidad de los métodos en el quehacer científico:

“...para que un trozo del saber merezca ser llamado «científico», no basta -ni siquiera es necesario- que sea verdadero. Debemos saber, en cambio, *cómo* hemos llegado a saber, o a presumir, que el enunciado en cuestión es verdadero: debemos ser capaces de enumerar las operaciones (empíricas o racionales) por las cuales es verificable (confirmable o desconfirmable) de una manera objetiva al menos en principio. Ésta no es sino una cuestión de nombres: quienes no deseen que se exija la verificabilidad del conocimiento deben abstenerse de llamar «científicas» a sus propias creencias, aun cuando lleven bonitos nombres compuestos con raíces griegas”. (1989, p. 14).

Existe una pluralidad de métodos científicos. ¿Cómo orientarse en ese universo? ¿Cómo seleccionar los métodos adecuados? Algunos indicadores son los siguientes:

1. Visualizar con precisión la problemática científica a abordar. Es el punto de partida.
2. Definir qué tipo, enfoque y alcance tendrá la investigación para afrontar el problema científico y demostrar/argumentar la hipótesis. Cada método tiene determinada pertinencia. Es irracional “pesar leña con una báscula digital”.
3. Valorar de qué tiempo y recursos se dispone. Determinados métodos requieren de más tiempo y recursos humanos y materiales.
4. Apreciar que ningún método aporta la “verdad absoluta”. La confiabilidad de los resultados no depende del empleo de un método específico.
5. Dominar las técnicas para la confección del instrumento y las reglas para su aplicación.
6. En el caso de que la muestra este conformada por sujetos, conocer la complejidad de la población y las condiciones en las que se aplicará el método.
7. Validar los métodos que lo requieran mediante prueba piloto.

La selección y aplicación de los métodos refleja también, la postura del investigador ante el objeto a estudiar. No existe un solo sendero metodológico. La naturaleza del conocimiento indica la libertad de este para diseñar la ruta científica a seguir, acorde con la contradicción científica que debe resolver:

“...en ciencia no hay caminos reales; la investigación se abre camino en la selva de los hechos y los científicos elaboran

su propio estilo de pesquisa [...]. Los científicos que van en pos de la verdad no se comportan ni como soldados que cumplen obedientemente las reglas de la ordenanza [...] ni como los caballeros de Mark Twain, que cabalgaban en cualquier dirección para llegar a Tierra Santa [...]. No hay avenidas hechas en ciencia, pero hay en cambio una brújula mediante la cual a menudo es posible estimar si se está sobre una huella promisoría. Esta brújula es el método científico, que no produce automáticamente el saber, pero que nos evita perdernos en el caos aparente de los fenómenos [...]. (Bunge, 1989, p. 17)

Los métodos para la investigación teórica son procedimientos que permiten operar a nivel del pensamiento abstracto, con constructos de diferente calado que integran el tejido de la ciencia: teoremas, conceptos, hipótesis, teorías, instituciones, leyes, paradigmas. Se constituyen sobre la base de operaciones del pensamiento lógico: análisis, síntesis, comparación, abstracción, generalización, concreción, inducción, deducción (Villabella, 2009, p. 125; Rodríguez et al, 1999, p. 1; Bernal y García, 2003, p. 36). Los fundamentales son: histórico-lógico, análisis-síntesis, abstracto-concreto, inductivo, deductivo, sistémico. Los métodos para la investigación empírica posibilitan captar datos y propiedades del objeto de estudio que se encuentran a un nivel fenoménico y que resultan cognoscibles sensorialmente. Su empleo requiere de una adecuada operacionalización de variables hasta nivel de indicadores, y convertir estos en ítems observables y medibles. Los esenciales son: experimento, observación, análisis de contenido, etnográfico, hermenéutico, estudio de casos, entrevista, encuesta, Delphi. No existe homogeneidad sobre cómo considerar a la entrevista y la encuesta. Algunos autores las catalogan como métodos, otros, como instrumentos del método de recogida de información (IBARRA, 2002, 116), o técnicas de la interrogación (Nocedo y Abreu, 1984, t. 2, p. 38). En este trabajo los consideraré como métodos. De los citados, algunos tienen se perfilan para estudios cualitativos porque revelan subjetividades, matices, dilemas, emociones: observación participante, estudio de caso, entrevista a profundidad, etnográfico, hermenéutico. Lo afirmado no significa que en un estudio teórico sea impropio utilizar determinados métodos de la investigación empírica o viceversa. Todo estudio empírico requiere construir un marco conceptual y para ello requerirá de procederes teóricos. Una investigación teórica puede matizarse con los resultados de acciones empíricas sin que ello modifique su modelo de análisis, como se apuntó *ut supra*. ¿Cuáles son los métodos de mayor empleo en la investigación jurídica? Existe disparidad de criterios al respecto. De León (2011, p. 75) registra los siguientes: intuitivo, discursivo, sistemático, deductivo, inductivo, histórico, dialéctico, científico y fenomenológico. Fix-Zamudio (1988, p. 56) relaciona los procederes: intuitivo, racional, comparado, empírico. Jiménez y Pinto (1988, p. 48) citan los métodos: teórico-jurídico, exegético-analítico, análisis histórico, jurídico-comparado y Delphi. Witker (2021, p. 8) reconoce los siguientes: observación, analítico, sintáctico, tipológico, fenomenológico, histórico, documental, estadístico, de campo. López (2005, p. 56) considera los procedimientos: deductivo, inductivo, analítico, sintético, histórico, exegético, comparativo. Pérez (2011, p. 23) apunta que existen métodos sociológicos para los estudios jurídicos: observación, análisis de documentos, consulta a expertos, experimento social, muestreo probabilístico, estudio

de casos; y relaciona como procedimientos propios: el método jurídico doctrinal, el histórico jurídico, el jurídico comparativo y el de contenido propiamente jurídico. La diversidad de opiniones es válida, empero, en la relatoria anterior existen inexactitudes. La “intuición” y la “racionalidad” no son métodos, difícilmente pueda desarrollarse una investigación si el sujeto no es intuitivo, sagaz, sensible, analítico, racional. Es errado hablar en singular de un “método científico”. Es un equívoco señalar que haya un “método empírico”, existen diversos recursos para las investigaciones de campo. Tampoco un método se convierte en propio del Derecho con adjetivarlo como “jurídico”. No existe un método “histórico-jurídico” o “hermenéutico-jurídico”, sino un método histórico-lógico que se emplea en las investigaciones jurídicas y en otras en las ciencias sociales. Comentario independiente merece el llamado “método teórico-jurídico”. Los mencionados Jiménez y Pinto señalan que es el procedimiento por excelencia de los estudios jurídicos porque estos se desarrollan a partir de principios teóricos, conceptos de la teoría y la filosofía, y procedimientos lógicos que logran deductivamente establecer el fundamento y la esencia de los fenómenos y procesos jurídicos. La referida Pérez apunta, que permite al investigador tomar posición frente a la realidad y asumir una perspectiva, iniciar la acción de conocimiento, elaborar el marco teórico conceptual, conocer qué investigaciones se han realizado, cuáles han sido los resultados, y construir argumentos con los que sostener puntos de vista. Amén de ambigüedades como glosar indistintamente en la explicación del supuesto método, acciones diferentes (estado del arte, marco teórico, triangulación teórica, indagación de antecedentes); la confusión central de estos autores es que individualizan un “método teórico” cuando en realidad existen diferentes procederes de esa envergadura para lo que describen. Ese “método”, además, lo califican de “jurídico” como si con ello, simplemente, lograran la decantación del método. No existe un método teórico-jurídico como no existe uno teórico-sociológico o teórico-económico. Toda investigación, en cualquier ciencia, parte de un marco teórico y a él regresa cuando transforma la información obtenida en conocimiento y para ellos emplea diferentes métodos teóricos. Como afirma Borón en el prólogo de “Manual de metodología. Construcción del marco teórico, formulación de los objetivos y elección de la metodología”, los datos solo logran hablar cuando la teoría les aporta el don del lenguaje (Dalet et al., 2005, 14). Un proceder que sí ha cultivado la Ciencia Jurídica, es el método de derecho comparado o comparación jurídica. La comparación como recurso gnoseológico no es patrimonio del Derecho, es aplicable a todas las investigaciones. Propicia verificar hipótesis y deslindar rasgos generales de particularidades, destacar pautas y curvas de evolución, explicar un fenómeno Duverger señala que es equivalente al experimento porque permite descubrir regularidades y explicar cuestiones (1971, p. 411), Carnelutti apunta que en la ciencia se observa y compara básicamente (1940, 68). La comparación permite al Derecho cotejar objetos pertenecientes a un mismo dominio: conceptos, instituciones, normas, procedimientos (Pliscoff y Monje, 2003, p. 34; Méndez, 1984, p. 31). El interés por los estudios comparados ha estado presente en el pensamiento jurídico desde la antigüedad, ejemplo de ello es la obra “Política” de Aristóteles (estudia constituciones y formas de gobierno de diversas ciudades griegas). El I Congreso de Derecho Comparado celebrado en París en 1900, se considera el inicio de una disciplina basada en este recurso científico. En la segunda mitad del siglo XX proliferaron centros especializados y revistas sobre el tema. La tendencia contemporánea es su empleo como herramienta gnoseológica no solo para conocer, sino

también, para la reingeniería de normas e instituciones jurídicas, y el acercamiento de tesis jurisprudenciales. De los métodos citados con anterioridad resultan de empleo en las investigaciones jurídicas los siguientes: histórico-lógico, análisis-síntesis, abstracto-concreto, inductivo, deductivo, sistémico, análisis de contenido, etnográfico, hermenéutico, estudio de casos, entrevista, encuesta, Delphi, Derecho comparado (Villabella, 2020, p. 56). A continuación, una breve caracterización de cada uno:

Método histórico-lógico

Pertinencia: Develar la evolución del objeto de investigación, los hitos, las tendencias en su desarrollo; lo que posibilita comprender su fisonomía actual. La valoración cronológica caracteriza el objeto externamente, la evaluación lógica devela los factores que han condicionado su comportamiento, los rasgos que ha adoptado, las conexiones con otros objetos; permite diferenciar lo esencial y regular de lo contingente y especulativo. Logra que la historia del objeto se presente como un suceder no solo de hechos, sino como evolución dialéctica que puede explicar los progresos, las discontinuidades, los zigzags. Es esencial en estudios teórico-longitudinal.

Instrumento: Línea del tiempo.

Metodología: 1) Prefijar los ítems referentes del decurso del objeto de investigación; 2) periodizar su desarrollo y las condicionantes que inciden en cada momento; 3) precisar los rasgos iterativos y diferenciadores de cada uno; 4) develar las mutaciones; 5) caracterizarlas teniendo en cuenta el entorno histórico, cultural y teórico; 6) describir la diacronía del objeto de estudio; 8) concluir.

Método de análisis-síntesis

Pertinencia: Examinar críticamente el objeto de investigación. Combina dos operaciones lógicas que vinculadas proporcionan un escaneo sustancial y crítico de este. La desfragmentación-examen-reconstrucción del objeto permite visibilizar su composición, analizarla, denotar las interconexiones internas, definir las propiedades esenciales. Es imprescindible en estudio teórico-jurídico.

Instrumento: Mapa topográfico.

Metodología: 1) Descomponer el objeto de estudio en sus rasgos, propiedades, atributos, dimensiones; 2) examinar y caracterizar cada una por separado; 3) determinar la esencialidad de estas en la estructura del objeto y su interrelación con los demás componentes; 4) descartar las propiedades o dimensiones indeterminantes; 5) integrar los atributos o dimensiones; 6) valorar y caracterizar holísticamente el objeto; 6) concluir.

Método abstracción-concreción

Pertinencia: Explorar una propiedad, dimensión o constructo del objeto de investigación. Se emplea interconectado con el método de análisis-síntesis, pero individualiza un componente para estudiarlo y revelar sus caracteres intrínsecos. Es básico en el estudio teórico-jurídico.

Instrumento: Esquema de ampliación angular.

Metodología: 1) Descomponer el objeto de estudio en sus rasgos, propiedades, atributos, dimensiones, constructos; 2) seleccionar y aislar la propiedad o constructo a examinar; 3) desfragmentarlo en los indicadores que la componen; 4) describirlo y caracterizarlo; 5)

evaluar su peso específico en la composición del objeto; 5) concluir.

Método inductivo

Pertinencia: Inferir tesis y derivar patrones desde una pluralidad de casos o situaciones, permite generalizar al margen de singularidades y elementos no esenciales. Es proceder en las investigaciones cualitativas. En la investigación teórico-jurídica puede emplearse para concluir el estudio de casos, elaborar tesis del análisis de contenido de documentos, o de la comparación jurídica.

Instrumento: Plantilla resumen.

Metodología: 1) Seleccionar los casos, sucesos o nociones a estudiar; 2) identificar el porqué de la selección; 3) examinarlos individualmente; 4) determinar los caracteres iterativos; 5) inferir los atributos compartidos, estandarizar regularidades; 5) teorizar una hipótesis; 6) concluir.

Método deductivo

Pertinencia: Propicia estudiar casos u objetos pertenecientes a un dominio a partir de teorías, afrontar contextos nuevos desde tesis, corroborar hipótesis, arribar a conclusiones desde premisas. Es proceder en investigaciones cuantitativas. En la investigación teórico-jurídica es válido para corroborar la eficacia de normas e instituciones jurídicas en contextos sociales cambiantes.

Instrumento: Plantilla de contraste.

Metodología: 1) Precisar el dominio del estudio; 2) determinar la teoría soporte; 3) examinar los contextos o casos seleccionados; 4) contrastar las notas del examen con el marco conceptual de referencia; 4) determinar coincidencias y discrepancias; 6) concluir.

Método sistémico

Pertinencia: Aborda el objeto de estudio en la dinámica y funcionamiento de un sistema institucional, una estructura teórica, o un plexo de normas. En la investigación teórico-jurídica puede emplearse para valorar instituciones interconectadas, la interrelación de operadores jurídicos, la sinergia de un segmento de normas.

Instrumento: Diagrama holístico.

Metodología: 1) Delimitar croquis del sistema; 2) determinar y caracterizar los elementos que lo integran; 3) ponderar el papel de cada componente en el funcionamiento del sistema; 4) caracterizar el flujo de interacción entre sus componentes; 3) discernir el peso de cada elemento en la dinámica funcional del sistema o estructura; 4) concluir.

Método de análisis de contenido

Pertinencia: Método de la investigación empírica de empleo en las ciencias sociales y humanidades, válido para el examen de un acto de comunicación oral o escrita de manera objetiva. Descifra la estructura conceptual, los códigos que se emplean, cuantifica ítems, identifica intenciones, devela mensajes subliminales, interpreta el contenido, caracteriza al emisor. En la investigación teórico-jurídica puede examinar expedientes, sentencias, actas parlamentarias, normas jurídicas; y describir su contenido, conceptos utilizados, argumentos, lagunas, antinomias.

Instrumento: Guía de variables.

Metodología: 1) Determinar el acto comunicativo o documento a analizar; 2) decidir el enfoque y la modalidad con que se realizará el análisis; 3) examinarlo a partir de las variables fijadas,

discriminando los demás caracteres; 4) registrar los atributos que se evalúan; 5) develar estructura y tópicos, cuantificar ítems, identificar contenido; 6) resumir e interpretar las notas; 8) caracterizar el acto comunicativo y la intencionalidad el autor; 9) concluir.

Método etnográfico

Pertinencia: Método de la investigación empírica, preferentemente con enfoque cualitativo, en la sociológica y la antropología; conveniente para estudiar un grupo humano y examinar su organización, comportamiento, actitudes, percepciones. Posibilita caracterizarlo, develar el entorno sociocultural, desentrañar pautas de convivencia y comunicación, comprenderlo. Se entrelaza con la observación participante y la entrevistas a profundidad. Se soporta en análisis inductivos y generativos. En la investigación teórico-jurídica puede emplearse para caracterizar el comportamiento y actitudes de un colectivo o comunidad humana en un hábitat delimitado, la percepción sobre un hecho o una norma, la comprensión de factores criminógenos en una región.

Instrumento: Guía temática.

Metodología: 1) Determinar el grupo a estudiar y el entorno; 2) fijar el tiempo del estudio y el tipo de inmersión del investigador; e) establecer guía preliminar y realizar exploración; 4) afinar las variables; 5) precisar los instrumentos a aplicar, las entrevistas a realizar, los comportamientos a observar; 6) registrar los datos; 7) interpretar los datos; 8) concluir.

Método Hermenéutico

Pertinencia: Método de la investigación empírica cualitativa de empleo en las ciencias sociales. Examina la comunicación escrita (documentos), verbal o extraverbal, e interpretarla. Descompone, analiza y descifra lo que estudia a partir de una triple perspectiva: la comprensión de la estructura del objeto que analiza, la percepción de este en un contexto situado, su sinergia con el entorno histórico-social. Se acompaña de otros métodos: etnográfico, análisis de contenido, observación participante, fenomenológico. En la investigación teórico-jurídica se emplea vinculado al análisis de contenido para comprender documentos jurídicos, particularmente normas y sentencias, a tenor de diversas variables: gramatical, sistémica, teleológica, axiológica, histórica, sociológica.

Instrumento: Guía de variables

Metodología: 1) Definir el fin de la exégesis; 2) delimitar las variables-guías; 2) explorar el documento; 3) afinar las variables; 4) registrar datos, constructos, símbolos; 4) analizar su significado; 5) codificarlos en dominios de mayor alcance; 6) interpretarlos; 7) elaborar tesis del sentido y alcance del análisis; 8) concluir.

Método de Estudio de casos

Pertinencia: Método de la investigación empírica en las ciencias sociales y en las ciencias aplicadas. Escruta de manera intensa, sistémica, y multifactorial una unidad o caso (persona, grupo, organización, suceso social) en su entorno real; lo que posibilita describirlo, caracterizarlo, comprenderlo, visualizar interioridades no observables a simple vista. Brinda respuesta al cómo y el porqué de un suceso o comportamiento. Se vincula con otros métodos: la observación, la entrevista, la encuesta, el análisis de contenido. En la investigación teórico-jurídica puede emplearse para el estudio victimológico, de delinquentes, de sucesos comunitario.

Instrumento: Bitácora de ítems

Metodología de empleo: 1) Delimitar fines; 2) determinar el criterio para la selección de los casos (de 6 a 10 casos

representativos); 3) aplicar los instrumentos para recopilar datos en relación con las variables de análisis; 4) procesar los datos; 5) interpretarlos; 6) compendiar los elementos coincidentes y discrepantes de los casos; 6) concluir.

Método de entrevista

Pertinencia: Método o técnica de recogida de información de amplio perfil en la investigación científica. Recopila información a través de una conversación planificada y controlada con un interlocutor que es un “sujeto clave” por la experiencia, información que posee, o ser testigo de un acontecimiento. La información que proporciona es de alto valor por su profundidad y riqueza testimonial. En relación con el propósito, la entrevista puede ser exploratoria, de comprobación hipótesis, a profundidad (historia de vida). De acuerdo con la guía temática puede ser estructurada, semiestructurada, no estructurada. En la investigación teórico-jurídica se puede emplear para acopiar información de expertos en un tema, opinión de operadores jurídicos, percepción de testigos, opinión de ciudadanos. Hándicaps: tiempo que requiere, preparación del entrevistador, habilidad para crear *rapport* con el entrevistado, necesidad de un entorno adecuado, dificultad para registrar la información a la par que se interactúa.

Instrumento: Guía de temas o de preguntas

Metodología: 1) Determinar la guía de contenidos a indagar; 2) preparación del investigador sobre el tema y las características del informante; 3) selección del lugar y las condiciones para su realización; 4) conformar la guía de preguntas (estructurada o semiestructurada) o temas (poco estructurada); 5) ejecutar la entrevista atendiendo a los momentos de su desarrollo (apertura, parte central, conclusión); 6) procesar la información; 7) concluir.

Método de encuesta

Pertinencia: Método o técnica de recogida de información a un grupo numeroso de sujetos, sobre temas específicos, fenómenos sociales, acontecimientos. Es versátil porque: recopila información objetiva y subjetiva, se adecua al segmento social que se aplica, requiere de condiciones mínimas para su aplicación, es económico, se aplica y tabula en breve tiempo. Hándicaps: no profundiza en las respuestas, estas pueden ser falseadas. Su éxito depende de que las preguntas sean: comprensibles, directas, breves, específicas, no induzcan la respuesta, no se malinterpreten, se ordenen adecuadamente (introducción, filtro, control, cambio de tema, objetiva, subjetiva). Su realización no debe rebasar los 30 minutos. Se puede aplicar de manera grupal (lo más común) o individual. En la investigación teórico-jurídica puede emplearse a grupos de operadores jurídicos para recabar opinión sobre un tema específico, o ciudadanos para recoger opiniones y percepciones.

Instrumento: Cuestionario.

Metodología: 1) Precisar las variables e indicadores a indagar; 2) convertirlos en preguntas; 3) confeccionar el cuestionario atendiendo al orden que deben tener las preguntas, su agrupamiento temático y la estructura del instrumento; 4) realizar prueba piloto; 5) afinar el cuestionario; 6) seleccionar los encuestados de acuerdo con los criterios fijados; 7) determinar el lugar en el que se realizará; 8) aplicarlo; 9) tabular las respuestas; 10) interpretarla; 11) concluir.

Método Delphi

Pertinencia: Método de la investigación empírica en las ciencias sociales y en las ciencias aplicadas. Propicia construir una opinión cualificada sobre un tema a partir del intercambio de un grupo de sujetos considerados expertos en un área. Las claves es la determinación de los parámetros para la selección de los “expertos” (no es determinante los años de labor en una profesión o área) y la precisión de las preguntas. La opinión cualificada se construye a partir del procesamiento de las respuestas y el debate, proceso que se reite sucesivamente hasta construir un dictamen consistente. Los expertos seleccionados no deben ser menos de 10. En la investigación teórico-jurídica se puede emplear para validar un criterio especializado o establecer una predicción sobre un asunto, no simplemente para recoger opinión de una norma o suceso.

Instrumento: Cuestionario estructurado

Metodología: 1) Fijar los parámetros para la selección de los expertos; 2) confeccionar las preguntas temáticas; 3) realizar prueba piloto del cuestionario; 4) seleccionar los sujetos expertos; 4) aplicar el instrumento; 5) tabular las respuestas; 6) aplicar nuevamente el cuestionario y procesar; 7) formular el criterio de los expertos; 8) concluir.

Método Derecho comparado

Pertinencia: Método de la investigación jurídica empleado para contrastar conceptos, instituciones, normas, procedimientos jurídicos; lo que posibilita destacar semejanzas y diferencias, establecer taxonomías, descubrir tendencias, develar modelos exitosos. Es imperioso: determinar el ámbito de la comparación (evitar exámenes espurios), preestablecer el propósito de la comparación, definir con exactitud las unidades de análisis. Puede adquirir diversas dimensiones: i) interna (se estudian normas o instituciones pertenecientes a un ordenamiento, puede ser con un sentido longitudinal-histórico, o transversal en países federales); ii) externa (coteja objetos entre ordenamientos jurídicos diferentes); iii) técnica (se estudian normas o instituciones como productos lingüísticos, a un nivel textual, desde un punto de vista técnico-jurídico); iv) sociológica (se realiza la comparación del fenómeno jurídico como parte de una red de condicionantes sociohistóricas y culturales en las que está inmerso). En la investigación teórico-jurídica es un recurso imprescindible cuando se pretende enjuiciar una institución o norma y proponer reformas.

Instrumento: Ficha de cotejo

Metodología: 1) Definir los conceptos, normas, instituciones a comparar; 2) seleccionar el ámbito de la comparación (con quién se compara); 3) confeccionar listado de variables a cotejar; 3) determinar la dimensión de la comparación (interna, externa, técnica, sociológica); 4) resumir resultados, destacar similitudes y discrepancias; 5) concluir.

7. Idoneidad de los métodos y fiabilidad de los resultados en las investigaciones jurídicas. Pendiente a resolver

El desiderátum de toda investigación es que los resultados que arroje sean fiables. Ello depende, entre otros factores, de la pertinencia del proyecto y el diseño; la corrección de las hipótesis; la selección de una muestra adecuada (en la investigación empírica) o de las fuentes apropiadas (en la investigación teórica); la validez y confiabilidad de los métodos e instrumentos utilizados.

La validez y confiabilidad proporcionan consistencia, estabilidad, certeza, explicación, transferibilidad y congruencia en los resultados. Ambos criterios guardan relación con la estabilidad en las condiciones del estudio, el control sobre la aplicación del método, la medida en que los valores que se obtienen representan la variable estudiada, etcétera.

La confiabilidad de los métodos refleja la consistencia de estos, evidenciado en que su aplicación repetida al mismo objeto, en condiciones semejantes, suministra resultados similares. Un método o instrumento confiable es aquel que arroja resultados estables y consistentes. Algunas fórmulas para corroborar esto: procedimiento test-retest, procedimiento de formas alternativas o paralelas, procedimiento de mitades partidas (Hernández et al., 2014, p. 201).

La validez de los métodos expresa la idoneidad de estos para estudiar el objeto o fenómeno, y obtener la información que se busca. Existen diversas evidencias de la validez del método o instrumento: interna, externa, de constructo, de contenido, de criterio, de conclusión estadística (Carmines y Zeller, 1979, p. 56; Hernández et al., 2003, p. 277).

La validez y confiabilidad se afecta cuando los métodos no son los adecuados, se improvisa su aplicación, se utilizan instrumentos empleados en otros contextos sin validarse, no se atienden las reglas en su aplicación, existe una inadecuada preparación del personal de apoyo, se contaminan los resultados, etcétera.

Una vía para reforzar la confiabilidad y validez es la triangulación, que puede ser teórica, metodológica, de fuentes, de investigadores, temporal, espacial.

¿Las investigaciones jurídicas de tipo teórico pueden aspirar a la fiabilidad de los resultados?

Las referencias a este indicador se relacionan con investigaciones empíricas. Empero, determinados parámetros son aplicables al estudio teórico-jurídico. Este es un aspecto descuidado en el quehacer científico del Derecho. Algunos de los criterios de validez y confiabilidad aplicables son los siguientes:

1. Confiabilidad: Los métodos o instrumentos seleccionados se han empleado en investigaciones anteriores similares, y los resultados que arrojaron, fueron consistentes y aceptados por la comunidad científica.
2. Validez de constructo: Se logra una operacionalización de conceptos y variables exhaustiva y solvente científicamente, mediante la triangulación teórica que posibilita contrastar las diferentes escuelas y tendencias, construir un marco conceptual sólido y un modelo de análisis riguroso.
3. Validez de contenido: Los métodos o instrumentos son los idóneos para trabajar una dimensión o atributo específico del objeto de investigación.
4. Validez de criterio: Las conclusiones que se establecen son continuadoras de resultados de otras investigaciones, de líneas teóricas establecidas.

8. Conclusiones

La investigación jurídica, en particular, la que se desarrolla en la academia y en la universidad vinculada al estudio de posgrado, es primordialmente, de tipo teórico. Sus objetos son conceptos, principios, teorías, que etiquetan realidades e identifican fenómenos socio-jurídicos; normas e instituciones jurídicas. Los “datos” con los que se opera son indirectos, intangibles, especulativos. La afirmación no niega que se aborden

problemáticas socio-jurídicas factuales desde una perspectiva empírica (cuantitativa o cualitativamente).

La investigación teórica es inviabilizada desde el positivismo científico. Las variables constituyen conceptos, nociones, constructos. Las hipótesis formulan enunciados que no “miden” o “demuestran causalmente”, sino argumentan tesis. El propósito es el análisis crítico, la reconstrucción de tejido teórico, establecer propuestas *de lege ferenda*.

El diseño de la investigación debe corresponder a la textura de lo que se investiga. Cuando se desarrolla el tema, se establece una taxonomía empática con el tipo de estudio empírico. El diseño para la investigación teórico-jurídica puede ser: diacrónico, sincrónico, metateórico, o de contraste.

Un aspecto determinante del quehacer científico son los métodos e instrumentos que se emplean para afrontar la problemática. Al respecto se sostienen equívocos al enunciar métodos que no son tales, o concebir que con colocarle el apellido “jurídico” a un método determinado, este se personaliza automáticamente para el Derecho. Los procedimientos científicos congruentes con el tipo de investigación que expongo son los siguientes: histórico-lógico, análisis-síntesis, abstracto-concreto, inductivo, deductivo, sistémico, análisis de contenido, etnográfico, hermenéutico, estudio de casos, entrevista, encuesta, Delphi, Derecho comparado.

Del rigor en el empleo de los métodos depende la fiabilidad de los resultados, su validez y confiabilidad. Este tema ha sido ignorado por la metodología de investigación jurídica, lo que atenta a la verosimilitud de los resultados. Si las acciones cognitivas que se emplea en un estudio jurídico son los correctos, los aportes pueden acreditar: confiabilidad, validez de constructo, validez de contenido y validez de criterio.

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The Problem Managing Bicycling Mobility in Latin American Cities: Ciclovías Recreativas Programs as Political Technologies Governance

Article Record

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Abstract

This theoretical essay aims at presenting the problem of managing bicycling mobility in latin-american cities through political technologies for planning Ciclovías Recreativas programs. According Estrada et al. (2009), Ciclovías Recreativas consist of events that temporarily open public roads for physical activities, restricting access to motorized vehicles. They generally take place on Sundays and holidays, lasting an average of six hours, and have varying names depending on the country. Despite the management efforts of the Latin American region's main metropolitan areas expanding accessibility for bicyclists through the implementation of bicycling infrastructure, Ciclovías Recreativas simultaneously promote, within a specific timeframe, the playful experimentation of bicycling mobility. These events, by modifying the dynamics of public roads, have the capacity to include the entire population in participation; however, it seems strategic to investigate how these programs can enhance mobility practices that foster a bicycling culture. The text is organized into four parts: 1) Researcher's perspective: an exposition of the research trajectory situating problematic field; 2) Urban mobility, cycle activism, and the use of bicycles on public roads: this section seeks to specify the path of research on public policies for active bicycle mobility; 3) Political technologies and agency: theoretical framework of the Human Sciences for the analytical interpretation; 4) Recreational Ciclovías Recreativas in the Latin American context. Given the asymmetrical political relations spheres power between cyclists and drivers motorized vehicles, the justification research lies problematizing scope of government technologies that expand conditions possibility agencyment bicycling use in Latin American cities.

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Keywords: *Bicycling, Ciclovías Recreativas, Public Policy, City Planning, Urban Mobility*

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1. Introdução

Este ensaio teórico buscou apresentar o problema do agenciamento da mobilidade ativa por bicicleta nas cidades por meio da noção foucaultiana de tecnologias políticas para gestão do planejamento dos programas de ciclovias recreativas. Para Estrada *et al.* (2009) ciclovias recreativas consistem em eventos de abertura temporal das vias públicas para a realização de atividades físicas, com restrição do acesso aos veículos motorizados. Acontecem geralmente aos domingos e feriados, com duração média de seis horas e nomenclatura variável a cada país.

No contexto sul-americano de planejamento da mobilidade urbana, nos importa diagnosticar de que forma os programas de ciclovias recreativas reproduzem uma gestão qualificada de trânsito inclusiva. Ao diagnosticar as tecnologias de governo que constituem sua organização política institucional, buscaremos circunscrever as correlações de forças configuradas na presença do que consideramos uma racionalidade política governamental disposta para os transportes motorizados como um heterogêneo de elementos discursivos e não-discursivos, que informam a concepção de uma política institucional estruturante do espaço viário.

Apesar dos esforços de gestão das principais metrópoles da região em ampliar a acessibilidade dos ciclistas com a implantação de

infraestrutura cicloviária, as ciclovias recreativas paralelamente promovem, numa temporalidade específica, a experimentação lúdica do ciclismo urbano. Estes eventos, ao modificarem as dinâmicas das vias públicas, contém a capacidade de incluir a toda a população a participar, mas para tanto, nos parece estratégico investigar como esses programas podem potencializar práticas de mobilidade agenciadoras da cultura de bicicleta.

O texto está organizado em duas partes. Na parte um, apresenta-se nossa perspectiva da mobilidade ativa por bicicleta, em conjunto dos conceitos práticas de mobilidade, tecnologia política, agenciamento e ciclovias recreativas. Na parte dois, a revisão da literatura expõe o estado da arte das pesquisas sobre ciclovias recreativas.

2. Campo problemático

2.1. Perspectiva do investigador

A partir do envolvimento fenomenológico com o ciclismo urbano descrito na dissertação de mestrado, sobre a perspectiva dos cicloativistas da cidade de São Paulo, buscou-se ampliar o percurso de pesquisa. Este caminho decorre da compreensão da diversidade das práticas de mobilidade ciclista no contexto da sua promoção com ciclovias recreativas.

No primeiro semestre de 2015, foi realizada uma cicloviação do interior do estado até a capital paulista para entrevistar pessoas envolvidas em diversas áreas de atuação com bicicleta e participar da formação sobre ciclomobilidade da Associação dos Ciclistas Urbanos de São Paulo (CICLOCIDADE). Desta investigação, resultaram duas pesquisas sobre práticas de mobilidade ciclística: a) do cicloativismo como direito humano às mobilidades ativas (TRONCOSO et al., 2018); b) do sentido político aplicado aos trabalhos de mecânica de bicicleta, gerente de agência bike courier, organizador de eventos com mountain bike, administrador de bike shop e gestora pública de infraestrutura ciclovária (TRONCOSO et al., 2019).

Neste processo de pesquisa, ao buscar compreender as diversas práticas de mobilidade com ciclismo urbano na cidade de São Paulo, percebe-se que nas cidades do interior o interesse da população pelo *mountain bike* tem sido tanto para ter contatos com paisagens rurais, bem como a fruição de pedalar em segurança distante do trânsito urbano. Com o aumento da procura por este tipo de atividade física, decorre a formação de diversos grupos ciclisticos que se reúnem no tempo livre e do aumento no comércio de peças, equipamentos e serviços com bicicletas.

De outra maneira, as políticas públicas de mobilidade ativa por bicicleta têm sido pouco incorporadas nesses territórios. A obrigação das gestões municipais elaborarem seus Planos de Mobilidade Urbana e que inclusive contam com um documento guia (BRASIL, 2015). Porém, sem uma normativa legislada, o caminho dos cicloativistas em exigir o seu direito, torna-se mais complexo para que os cidadãos se articulem para interpelar as autoridades no cumprimento da política nacional, principalmente com o estabelecimento de ações educativas com bicicleta.

No segundo semestre de 2015, foi realizada uma outra viagem de bicicleta dentro da Colômbia para realizar intercâmbio acadêmico na *Universidad de Antioquia* (UdeA) em Medellín. Esta cicloviação entre Medellín-Bogotá (ida-e-volta), teve por objetivo entrevistar gestores públicos, cicloativistas, professores, mecânicos e ex-atleta de ciclismo de estrada de renome internacional (TRONCOSO et al., 2022). Estas entrevistas foram realizadas para poder conhecer melhor o campo das políticas cicloativistas, educativas e de gestão públicas de incentivo à mobilidade ativa por bicicleta neste país ao ampliar as perspectivas de agenciamento do seu uso.

No primeiro semestre de 2016, pedalamos aproximadamente 4500 km pelo continente sul-americano, passando por Brasil, Uruguai, Argentina e Chile, para conhecer uma rede de cicloativistas, teve como objetivo participar do *V Foro Mundial de la Bicicleta (FMB) – Energía Humana, Poder Ciudadano*. Durante o trajeto, foram realizadas 30 entrevistas com políticos, mecânicos, professores e cicloativistas.

Em 2017, ao cursar a disciplina “Práticas Sociais e Processos Educativos” do Programa de Pós-graduação em Educação da Universidade Federal de São Carlos (UFSCar), foi refletido criticamente a partir dos referenciais teóricos de Paulo Freire e Enrique Dussel sobre os processos educativos vivenciados na práxis de libertação cicloativista. Pode-se afirmar que para avançar da atual situação de exclusão desta posição epistemológica nas políticas de mobilidade urbana, considera-se a formação do diálogo institucional apoiado pela universidade com o poder público na promoção da cultura de bicicleta (TRONCOSO et al., 2018).

Entre dezembro de 2017 e janeiro de 2018, foi realizada outra cicloviação, pedalando aproximadamente 3500 km entre os estados de São Paulo, Minas Gerais, Bahia, Espírito Santo e Rio de Janeiro para entrevistar agricultores na perspectiva do cicloturismo agroecológico. A promoção da cultura da bicicleta nestes contextos, contém potencial de ser uma alternativa propulsora para o

desenvolvimento da motricidade humana entre ciclistas urbanos e agricultores familiares produtores de alimentos orgânicos, preservando conscientemente a biodiversidade gerando benefícios para o ambiente da saúde coletiva (TRONCOSO et al., 2020).

Em um trabalho sobre a promoção do uso da bicicleta, na perspectiva de docentes universitários em Brasil, Colômbia e Chile, com práticas de mobilidade ciclísticas, na análise discursiva, emergiram as unidades de significado: 1) Ciclismo urbano como temática de pesquisa; 2) Articulação político-institucional para a mobilidade ativa; 3) Ensino-aprendizagem do pedalar na cidade, geradores da categoria “Cultura da bicicleta como processo cognitivo-educativo”. Para os autores, o incentivo ao uso da bicicleta contém potencial de política institucional e de alternativa emergente interdisciplinar de ensino, pesquisa e extensão (TRONCOSO et al., 2019).

Buscou-se compreender os processos educativos vivenciados por mecânicos de bicicleta com longa experiência em seis contextos laborais. Na análise discursiva, emergiram as unidades de significado: ensino-aprendizagem no trabalho com bicicleta; b) influência tecnológica no ciclismo; c) saúde e cuidados ao pedalar que sustentam a categoria “Mecânica da bicicleta como processo cognitivo-educativo”. Para os autores, a mecânica de bicicleta é parte fundamental do fenômeno das práticas de mobilidade com efeitos na realidade urbana. (TRONCOSO et al., 2020).

Entre 2018-2019, na cidade de Valdivia, Chile, foi trabalhado junto com a Direção de Serviços da *Universidad Austral de Chile* (UACH), a criação do espaço de mecânica colaborativa “*Bicicletería Austral*”. Em paralelo, foi desenvolvido junto ao *Departamento Administrativo de Educación Municipal* (DAEM) o projeto “*Biciudadanía en ambientes escolares*” para gerar processos educativos com bicicleta nas vias públicas (TRONCOSO et al., 2021).

Retomando a experiência vivida na Colômbia, ao conhecer uma diversidade de atores sociais envolvidos no agenciamento da mobilidade ativa por bicicleta neste país, no regresso deu-se participação no “*VIII Foro Nacional de la Bicicleta - Fusagasugá 2022*” para apresentar a perspectiva de Lucho Herrera, importância ciclista colombiano, na promoção do ciclismo urbano neste país (TRONCOSO et al., 2022). Este evento, que começou com uma cicloviação de 80 km, desde Bogotá até esta cidade, no fechamento total de uma rodovia, com aproximadamente 500 ciclistas, verificou-se o nível de organização dos governos distrital de Bogotá, departamental de Cundinamarca e municipal que, com a articulação política do IDRD, coube a função da sua realização por onde passou mais de 2000 pessoas.

Na Colômbia, o ciclismo de estrada é considerado um esporte nacional com ampla visibilidade midiática sendo representado pelos “*escarabajos*” (nome dado aos colombianos por sua excelência em pedalar em grandes subidas) nas principais competições internacionais. O governo distrital de Bogotá tem incentivado o uso da bicicleta, seja na implantação de infraestrutura com o sistema de “*ciclorrutas*” e de estacionamentos seguros em estações de transporte público e centros comerciais. A promoção institucional de ciclovias recreativas pelo governo nacional inclui apoio logístico e operacional aos governos departamentais e municipais na formação de agentes públicos do setor de educação física.

Esta mobilização do Distrito Central de Bogotá ocorre em uma metrópole que, apesar de ainda não possuir um sistema de transporte público massivo sobre trilhos, segundo contagens oficiais, aproximadamente 8% da sua população utiliza a bicicleta nos deslocamentos diários. Houve entendimento de que esta condição privilegiada, decorre há 50 anos das atividades do Programa Ciclovía.

A entrevista realizada com Jorge Mauricio Ramos Martinez, coordenador entre 2003-2013 do Programa Ciclovía do IDRD,

afirmou que na participação cidadã, envolve uma correlação de forças entre cicloativistas e governantes, com apoio institucional de normativas que determinaram uma autoridade administrativa competente de controle viário onde são desenvolvidas atividades culturais, recreativas e esportivas cuja gestão qualificada do trânsito é o resultado do apoio intersetorial de governo que ampliou as possibilidades do seu uso na cidade (TRONCOSO, 2019).

2.2. Mobilidade urbana, cicloativismo e o uso da bicicleta nas vias públicas

Diante da complexidade de se promover o uso da bicicleta, reconhece-se o argumento jurídico cicloativista de reivindicar o cumprimento da lei na implantação de infraestrutura cicloviária para fomentar a segurança dos ciclistas. Sob outra perspectiva, esta não pode ser a única estratégia política para promover o incentivo da mobilidade ativa por bicicleta, mas que, ao mesmo tempo, está condicionada à aplicação de legislação específica. Ainda assim, esta medida tem encontrado resistência por parte dos condutores de veículos que, além de pouco terem a oportunidade de pedalar na cidade, esta reivindicação contrária tem gerado um ciclo vicioso que impede avanços operacionais na implantação dessas estruturas.

Bonhan e Cox (2010) examinaram a introdução generalizada de infraestrutura cicloviária segregada no Reino Unido e Austrália e destacaram que, apesar dos seus benefícios, tem havido problemas significativos para o ciclismo nos comportamentos de viagem mais amplos. Os autores concluem que esses espaços, ao retirarem os ciclistas do compartilhamento viário, operam para manter as normas existentes e podem estar em desacordo com seu potencial de mobilidade.

Esta resistência decorre da reprodução das necessidades objetivas dos condutores por meio de obras viárias adequadas ao fluxo e velocidade motorizada e subjetivamente através de comunicação massiva permanente sobre o consumo da automobildade. Esta combinação de formação do pensamento motorista tem influenciado o comportamento da população no uso de transportes individuais.

Urry (2004) define a automobildade como um sistema de expansão global da necessidade do automóvel devido a flexibilidade de uso do tempo-espço, status e símbolos de valor associados. Para o autor, a subordinação de outras formas de mobilidade, o consumo de espaços públicos e a utilização demasiada de bens naturais, geram um caráter específico de dominação da sociedade civil. Egan e Caufield (2024) afirmam que a automobildade é politicamente sustentada no sistema dominante de opinião pública como discurso normativo de prática essencial das tarefas funcionais, sua desconstrução busca descentralizá-la da vida social.

Apesar da bicicleta ser um instrumento de acesso popular para a mobilidade urbana, geralmente os ciclistas se deparam com uma ambiência viária produzida pela automobildade que causa risco à vida humana. Ao visualizar nos programas de ciclovias recreativas uma política pública eficaz para promover o uso da bicicleta em escala populacional, cabe problematizar as lógicas de operacionalização contidas na organização desses programas que envolvem diversos atores sociais, dentre eles, poder público, técnicos de planejamento, organizações sociais não-governamentais nacionais e internacionais, cicloativistas, iniciativas privadas e usuários em geral.

Ao gerar a condição de possibilidade para uma reconfiguração de forças políticas permanente no planejamento urbano com ciclovias recreativas, os gestores públicos passam a levar em consideração as práticas de mobilidade em relação ao ambiente construído para atividades físicas. Esta relação comumente associada às práticas corporais em parques públicos ou, até mesmo, em academias de ginástica no Brasil, ganha outro contorno sobre a promoção da

saúde ao considerar as vias públicas como local apropriado para a reprodução das mobilidades ativas.

Para Cresswell (2010) a mobilidade pode ser pensada como um emaranhado de representação e práticas. O autor defende uma política de mobilidade em termos de força motriz, velocidade, ritmo, rota, experiência e fricção humana ao considerar a existência histórica de frágeis sentidos de movimento e que foram marcados por formas distintas de regulamentação móvel.

Jensen (2011) afirma que a mobilidade se torna visível e real a partir dos seus diferentes aspectos que aparecem e ocorrem em ambientes espaciais específicos sob o funcionamento das diversas formas de poder. Para a autora, a mobilidade se confunde com percepções, experiências e desejos do eu moderno com base no enquadramento de imaginá-la, praticá-la e experimentá-la no sentido de alargar a nossa linguagem para abordar suas questões intrínsecas e futuros possíveis.

Mimi Sheller, acadêmica que colaborou para estabelecer o “novo paradigma das mobilidades”, nos apresenta cinco caminhos aos investigadores para ampliar a compreensão das práticas de mobilidade: 1) uma nova forma de pensar os mundos como emergentes de relações, fluxos e circulações multiescalares; 2) sua investigação fornece informações sobre as agências materiais das vidas móveis contemporâneas; 3) compreender suas representações discursivas enquanto fenômenos móveis ou imóveis, rápidos ou lentos; 4) um método local de ação colaborativo para explorar a ética e desenvolver quadros explicitamente normativos para instigar a sua justiça; 5) existe uma política de mobilidade organizada em torno de “constelações” de movimento, significado e prática desiguais e diferenciais que se unem pelas experiências vividas (SHELLER, 2018, p.20).

Para Manderscheid (2014) apesar do paradigma das mobilidades considerar o contexto onde as práticas de mobilidade das pessoas estão inseridas, a investigação empírica tende a investigar o social separadamente enquanto sentido subjetivo da experiência em contraposição a base discursiva, espacial ou estrutural. A partir disso, a autora faz uma proposta de investigação crítica que busca tecer ligações entre estruturas e práticas de mobilidades com a análise de correspondências múltiplas que reforçam as redes sociais como origem das decisões.

Cook et al. (2022) definem mobilidade ativa como viagens nas quais o esforço físico sustentado do viajante, contribui diretamente para o seu movimento. Por outro lado, Coelho (2020) ao se referir a este conceito nas cidades brasileiras, o caracteriza como uma subespécie do direito à cidade, inspirado por princípios democráticos de justiça social. Para a autora, na cidade forjada pelo capitalismo, a mobilidade urbana estabelece um aparato de exclusão onde aqueles que convivem perto das centralidades, sofrem segregação em seus deslocamentos.

Estes autores fazem parte de uma rede de pesquisa europeia e que está relacionada a abordagem foucaultiana sobre as práticas de mobilidade ao ampliar as condições de possibilidade de se pensar no planejamento urbano inclusivo à bicicleta. De outra forma, ao definir o conceito de mobilidade ativa e sua correlação com o processo político institucional de implementação da pauta dos governos brasileiros, estamos apoiados em uma abordagem que envolve a complexidade de se abordar o fenômeno mobilidade ativa por bicicleta na maneira como está estruturada a condição violenta que sofre o ciclista nas cidades brasileiras.

Para exemplificar esta exclusão, de acordo com o Centro de Liderança Pública (CLP), em 2023 foram 24052 homens e 5045 mulheres que morreram em acidentes de trânsito com taxa de acidentes fatais em 15 mortes por 100.000 habitantes. Ainda, entre 2012-2023, foram perdidos R\$ 251 bilhões, uma perda anual

de aproximadamente R\$ 21 bilhões, R\$800 mil por indivíduo, o que corresponde a 0,2% do PIB brasileiro. A nota técnica sugere como medidas os governos implementarem leis de segurança viária, melhorias na infraestrutura rodoviária, campanhas de educação e fiscalização (CLP, 2024).

Mascolli et al. (2023) descreveram as características dos óbitos de ciclistas, sua evolução e o papel da estrutura cicloviária do município de São Paulo. Os autores diagnosticaram que a taxa bruta de mortalidade de ciclistas aumentou entre 2000-2006 e diminuiu entre 2007-2017, com variação positiva de 32% nas viagens diárias de bicicleta (em 2015 foi 2,9 por 100.000 habitantes e no estado de São Paulo, foi 3,7 por 100.000 habitantes). Os autores recomendam o reforço da implementação de medidas protetivas e educativas para esta população.

O Código de Trânsito Brasileiro (CTB) determina o respeito aos ciclistas. No artigo 29, os ciclistas têm prioridade sobre veículos automotores e pedestres têm prioridade sobre ciclistas; no artigo 201, não guardar distância lateral de 1,5m ao ultrapassar bicicleta, infração média e multa; no artigo 220, não reduzir velocidade compatível com a segurança do trânsito, infração grave e multa e, no artigo 170, dirigir ameaçando pedestres ou demais veículos, infração gravíssima, multa, suspensão do direito de dirigir, retenção do veículo e da habilitação (BRASIL, 1997). Entretanto, os ciclistas não são atendidos em suas demandas para reivindicar seus direitos. Zuge Junior (2015) afirma que a posição cicloativista paulistana busca pressionar o poder público no cumprimento destas normas jurídicas, o que motiva a aglutinação de indivíduos em torno da percepção política de risco compartilhado.

Historicamente, as regiões metropolitanas brasileiras se constituíram na segunda metade do século XX com a modificação da circulação urbana do centro, local de trabalho para as moradias nas periferias, gerou um espraiamento urbano com a realização de grandes vias e gerando dependência da população pelos transportes individuais. O uso da bicicleta estabelece-se marginalmente devido às limitações físicas em contraste com o sistema da automobidade.

Balbin (2016) entende que a lógica da mobilidade urbana no Brasil está relacionada às determinações individuais que influenciam na organização do espaço nos modos de vida. Para o autor, uma das transformações no contexto da mobilidade cotidiana é seu reforço impulsionado pelas novas tecnologias da comunicação, para além do paradigma de circulação que estrutura o espaço urbano, onde o espaço da cidade expande o universo da “vida de relações humanas”.

A transformação da mobilidade pelas tecnologias de comunicação que influencia no hábito do indivíduo em mobilizar-se passivamente sendo capturado por uma forma de vida motorizada. Para Silva et al. (2016) os modos motorizados permitiram que os tempos de viagem se mantivessem nos mesmos intervalos aqueles observados nas viagens a pé, ainda que, com distâncias percorridas maiores. Esta característica exponencial do transporte tem levado a ampliação das áreas urbanizadas, porém, têm acarretado no excesso de viagens motorizadas saturando, tanto as vias existentes, como aquelas construídas para absorver uma demanda crescente por espaço viário (p.81).

No Brasil, quando se pensa em ciclovias, a primeira ideia que surge é de espaços segregados nas vias públicas para bicicleta. Na tentativa de ampliar o conceito, esse programa opera no sentido de entregar, de forma temporária, a condição para a pessoa pedalar, sendo uma forma legítima e alternativa de promover o seu uso. Diferentemente de segregar determinada parte da via, este tipo de fechamento das vias públicas implica dar outra forma à bicicleta na cidade que, ao ser explorada para atividades recreativas, entrega um lugar comum no

imaginário coletivo ao criar outra função social para formas ativas de deslocamento.

Olekszechen et al. (2016) ao verificar como os estudos pessoa-ambiente enfocam a temática do uso de bicicletas como meio de transporte a partir das categorias hábitos e atitudes, ambiente e comportamento e percepção, os resultados apontam para a compreensão multideterminada deste modal. Para Carvalho e Freitas (2012) ao analisarem a produção científica que trata da relação entre o ciclismo como meio de transporte e a saúde pública, demonstraram que é recente a preocupação com este tema e que o seu padrão ocorre de forma heterogênea, mas com potenciais de maiores impactos nos países em desenvolvimento, onde torna-se urgente a inclusão deste tema nas agendas de pesquisas sobre a relação entre promoção do transporte ativo, saúde e segurança no trânsito.

Para Tagliari e Pawlowsky (2021) a mobilidade ativa apresenta-se como um meio para a promoção da saúde e para diminuir a quantidade de gases poluentes através da construção de ambientes de aprendizagem educacional formal e não formal, em atividades pontuais, bem como por meio de intervenções de longo prazo, na criação de oportunidades com instrução e encorajamento para a efetuação.

A “Agenda Convergente Mobilidade Sustentável e Saúde” elaborada pela Organização Panamericana de Saúde (OPAS) e vinculada a Organização Mundial da Saúde (OMS), elencam os impactos positivos da mobilidade ativa na prevenção dos acidentes de trânsito, na realização de atividades físicas e na melhora da qualidade do ar nas cidades. Para sua implementação requer haver uma articulação entre agendas de trabalho intersetorial das políticas públicas, de promoção do bem-estar das populações, para ampliar a otimização de recursos nos processos de planejamento institucional ao ampliar o seu alcance e efetividade (OPAS, 2020).

O Guia de Atividade Física para a população brasileira elaborado pelo Ministério da Saúde, indica a promoção da atividade física nos deslocamentos cotidianos, seja a pé, bicicleta, patins e skates, pessoas com deficiência e com mascotes. A tarefa multisetorial deve ser operada por gestores do campo da educação física, recreação e esporte em conjunto com funcionários técnico-administrativos do trânsito e o apoio da iniciativa privada, de organizações sociais e da cidadania para a legitimação dessas atividades (BRASIL, 2021).

Oliveira e Silva (2021) adotando como referencial o conceito de “Saúde em Todas as Políticas”, acreditam nas Ciências da Atividade Física, a tarefa de formar uma agenda multisetorial de pesquisa e *advocacy* que possa reorientar o desenho urbano e de uso do solo. Para Nieuwenhuijsen et al. (2017) a poluição atmosférica, o ruído, a temperatura, os espaços verdes, os acidentes com veículos motorizados e a atividade física ligam o planejamento urbano e dos transportes à saúde pública. Para a tomada de decisões políticas, é importante compreender e ser capaz de quantificar toda a cadeia, desde a fonte, passando pelos caminhos até aos efeitos e impactos na saúde, para fundamentar e direcionar eficazmente as ações.

Ainda, Nieuwenhuijsen et al. (2019) apresentam a ferramenta de Avaliação do Impacto na Saúde (AIS) para integrar evidências no processo de tomada de decisão e que, ao introduzir a saúde em todas as políticas, têm sido utilizadas para viabilizá-las para melhorar a saúde pública nas cidades. Para as autoras, o processo sobre como chegar lá é tão importante quanto o resultado real ao fornecer respostas sobre como diferentes disciplinas/setores trabalhar integrados por uma determinada abordagem de saúde pública para provocar mudanças no planejamento urbano.

Varela e Hallal (2024) insta os pesquisadores a considerar o contexto em que a atividade física é praticada em cada comunidade com uma estratégia analítica para adaptar as recomendações às

necessidades dos indivíduos. Para os autores, esta abordagem requer que os governos, os decisores políticos e a comunidade científica ajudem a construir sociedades nas quais a escolha da pessoa ser fisicamente ativa seja conveniente, agradável, seguro, acessível e valorizada.

Santos e Santos (2022) afirmam que a bicicleta precisa ser integrada às políticas de mobilidade urbana, partindo da convivência nas vias públicas ao habitar a cidade. Silva (2020) propõe a utilização do conceito mobilidade ativa integrado aos instrumentos urbanísticos do Plano Diretor e Plano de Mobilidade Urbana com base nos critérios: a) na elaboração participativa com base nas condições de circulação dos deficientes, pedestres e ciclistas; b) dos instrumentos legais e normativos em conjunto ao apoio de organizações sociais; c) na consolidação dos levantamentos como produto de leitura técnica; d) na aprovação em lei municipal com diretrizes que orientem a atuação do poder público (p.87).

A principal normativa brasileira que promove o uso da bicicleta é a Lei federal 13.724 de 2018 que instituiu o Programa Bicicleta Brasil. Ao inserir a bicicleta como componente da mobilidade urbana com diretrizes gerais aos agentes públicos e privados.



Fonte: ENABICI (2023)

Figure 1. Organograma Árvore de problemas

A ENABICI está dividida em cinco eixos: 1) Políticas públicas, legislação e controle social; 2) Infraestrutura ciclovitária; 3) Bicicleta movimenta a economia; 4) Promovendo a mobilidade por bicicleta e 5) Orçamento e financiamento. Neste documento, as “Ruas Completas” devem ser incluídas na elaboração de Projetos Ciclovitários para redistribuição dos espaços das vias para segurança na circulação humana com normas que precisam ser consolidadas ao garantir maior qualidade aos técnicos que elaboram os projetos (ENABICI, 2023).

O agenciamento das ciclovias recreativas necessita ser problematizado para analisar os fatores que potencializam o desenvolvimento das práticas de mobilidade ciclísticas a partir dos processos de integração técnica e administrativa do planejamento urbano. Diante disso, caberia interrogar se esses programas podem ser caracterizados como estratégias governamentais compostas de tecnologias políticas diversas que colaboram para ampliar a acessibilidade e inclusão social das mobilidades ativas, especialmente à bicicleta, no trânsito das vias públicas.

2.3. Tecnologias políticas e agenciamento

Nesta seção, apresenta-se uma abordagem analítica possível para problematizar os programas de ciclovias recreativas. Neste contexto da promoção do incentivo ao uso da bicicleta, agentes públicos, cicloativistas e de organizações sociais, estão às margens dos processos decisórios das políticas de planejamento urbano, não são considerados. O resultado é o foco da gestão pública na implementação de infraestrutura ciclovitária, mas que pouco modifica

o atual cenário de segregação nas vias públicas de desenvolvimento das mobilidades ativas.

Apesar dos benefícios para a saúde pública, as ciclovias recreativas se tornam uma estratégia de governo intersetorial concebido para a prática de atividade física aos domingos com o interesse do governo municipal. A integração de setores para sua operação, ocorre com a participação desses atores sociais de acordo com o envolvimento das autoridades políticas que se abrem, em mesas de diálogo, para negociar e empreender economicamente a sua atuação.

Para o evento congregar parcela importante da população que tem colaborado para a formação do comportamento ciclista na população, o poder público é fundamental para planejar o desenho de intervenção das atividades recreativas, culturais e esportivas. Para tanto, esta ação administrativa ocorre por meio de um planejamento logístico e operacional entre os níveis de atuação público e privado. Esta articulação se comporta como uma tecnologia de governo ao ampliar as condições de possibilidade para condução de condutas com bicicleta na cidade.

Diante das correlações desiguais de forças na constituição do espaço das vias públicas, a promoção de práticas de mobilidade ativa em ciclovias recreativas contém potencial de modificar a composição de estratégias no campo da mobilidade urbana. A problemática da violência no trânsito resulta da pouca organização desses espaços, por isso há se de requerer tecnologias de governo que conduzam (in)diretamente os condutores de veículos a se responsabilizar pelo comportamento das mobilidades ativas para assim ter a noção de respeitar as normas e regras de trânsito, cabe agenciar uma conduta de segurança nas vias públicas.

Entende-se por agenciamento nesta pesquisa, as tecnologias de governo das condutas, por meio de projetos e programas que ampliam a adesão da população à mobilidade ativa por bicicleta em vias públicas. Na multiplicidade de grupos que promovem o seu uso, apesar das diferenças nas práticas de mobilidade, a condição comum de insegurança vivida nesses espaços.

A congregação de interesses na formação da cultura de bicicleta em ciclovias recreativas, passa pela reconfiguração de forças na ocupação viária. O caminho passa por ampliar as discussões institucionais sobre os processos de agenciamento das políticas públicas de planejamento urbano que possam modificar a atual concepção arquitetônica para garantir segurança aos ciclistas.

Para Savage (2022), a abordagem do agenciamento leva em conta as relações emergentes de exterioridade, a heterogeneidade das composições sociais, a relacionalidade dos saberes na constituição das estruturas de fluxo e a atenção ao poder das agendas políticas. Para o autor, a proposta conceitual do agenciamento busca esclarecer os aspectos organizacionais de como podem funcionar determinar política pública ao ser adotada e adaptada ao contexto local com base nos múltiplos fatores específicos estrategicamente organizados para torná-la viável.

Ao visualizar os programas de ciclovias recreativas na perspectiva foucaultiana, sua operacionalização caracteriza-se por diversas tecnologias políticas compreendidas em ações e estratégias de planejamento urbano que estabelecem, em uma temporalidade específica no viário urbano, uma intervenção no trânsito motorizado, por meio de uma operação logística que induz a formação de outras condições de possibilidade para transformar o comportamento dos indivíduos com práticas de mobilidade ciclista. Nestes eventos, a promoção das atividades físicas visa transformar as relações de poder na governança das mobilidades ativas ao ampliar a concepção de ambiência nesses espaços públicos livres.

Para Michel Foucault, a partir dos séculos XVI-XVII, a regulação de exercício do poder passou a ser feita da sabedoria para o cálculo

das forças, agora regulado pela racionalidade política na perspectiva do comportamento dos indivíduos governados como sujeitos guiados por seus próprios interesses (FOUCAULT, 2008).

Segundo Edgardo Castro, tecnologias políticas são práticas sociais dispostas pela regularidade e que acompanham os modos de fazer. Para o autor, os termos técnica e tecnologia, agrega a ideia de prática aos conceitos de estratégia e tática para mostrar um saber do corpo que se torna cálculo e organização na capacidade do manejo de forças para obter corpos úteis e dóceis, por isso a disciplina é uma tecnologia e não uma instituição ou aparato (p.525-6). Para Foucault, o que define uma tecnologia política é o exercício da estratégia local nas relações de poder subordinadas a um modo de produção operacional de forças em ação sobre a ação compostas no espaço-tempo da infraestrutura (DELEUZE, 2020).

A ciclovía recreativa sendo uma tecnologia política de agenciamento das práticas de mobilidade com bicicleta, com o seu desenvolvimento tem ampliado a estrutura de gestão por estar caracterizada como uma operação intersetorial de governo. Esta intervenção estrategicamente realizada em uma temporalidade específica, está organizada institucionalmente por uma lógica de operacionalização particular para induzir os indivíduos a mobilizar-se ativamente pelas vias públicas e com sua permanência, busca transformar a disposição desses espaços.

A hipótese de pesquisa busca afirmar que a ciclovía recreativa sendo uma tecnologia política, opera por meio de uma estratégia intersetorial para criar ambientes de apoio à atividade física nas vias públicas. O seu agenciamento no governo das mobilidades ativas, têm colaborado para gerar novas condições de possibilidades para o uso da bicicleta nas cidades que foram parte do estudo. Na constituição dos programas analisados, coube problematizar como um evento recreativo massivo que necessita de uma operação de trânsito, pode modificar o panorama de planejamento urbano do pedalar com segurança nesses espaços.

Diante disso, como a gestão política desses programas, composta por técnicas e práticas de governo, agencia a atividade física das mobilidades ativas em vias públicas? b) De que forma a organização institucional, composta de leis, decretos, normas, acordos e regulamentos, determina a operacionalização destes programas?

O esforço de pesquisa tem o desafio de construir um vetor de análise sobre o conjunto de estratégias dos atores sociais envolvidos. Ao expor estas táticas de agenciamento com bicicleta, vai ser possível diagnosticar as lógicas de operacionalização em dois níveis: a nível macro, a gestão política desses programas em duas metrópoles sul-americanas e, a nível micro, os processos de constituição intersetorial implicam organizações institucionais diferentes.

2.4. Ciclovias recreativas no contexto das cidades latino-americanas

Para contextualizar o leitor sobre o conceito de ciclovias recreativas, faz-se menção a alguns fatos históricos que consolidaram a Ciclovía de Bogotá. Foi realizada a primeira vez no dia 15 de dezembro de 1974 denominada “*Mitin a favor de la bici*”, uma iniciativa da organização *Procicla* e o Departamento de Trânsito, contando com a presença de aproximadamente 5000 pessoas (ORTIZ, 1995).

Os promotores envolvidos passaram a contar com influência política para o fechamento temporário de determinadas vias públicas, e, após crescente apoio popular, a prefeitura promulgou em 1976, os Decretos 566 e 567 que definiam “*Las Ciclovías*”. Para Rodriguez (2017) esses decretos legitimaram os esforços do *Procicla* e motivaram outras entidades a aderirem ao projeto, mas a ideia de pedalar aos domingos, como ato de entretenimento cidadão, levou mais tempo.

A partir do Programa Ciclovía, outras metrópoles passaram a realizar ciclovias recreativas. Em 2005, o IDRD realizou a “*Primeira Conferência Internacional sobre Ciclovías Recreativas*” na qual foi criada a “*Red de Ciclovías Unidas de las Américas*” composta por instituições governamentais, organizações não-governamentais e promotores. Ao final do evento, os participantes assinaram a “*Declaración de Bogotá*”:

“

Observa-se o desenvolvimento das cidades americanas marcadas por infraestruturas de transporte sem refletir sobre as mobilidades ativas. Considera-se a construção de cidades saudáveis através de programas que promovam a interação humana. Acolhe-se as iniciativas de usos temporários em vias públicas destinadas para as pessoas. Aprecia-se as atuais ciclovias que gozam de apoio popular. Em média, 2,4 milhões de cidadãos saem às ruas todos os domingos com iniciativas que implicam ter maior participação na gestão das suas condições por meio de campanhas de comunicação que promovam a recuperação dos espaços públicos com atividades recreativas. Está formatada por um grupo de trabalho para criar esta rede como uma associação de entidades interessadas em fortalecer esses programas no continente americano (ESTRADA et al., 2009).

Com o aumento do interesse de diversas administrações municipais de vários países em implantar ciclovias recreativas, houve um aumento no número de filiados desta rede de promotores. Em 2009, a rede mudou para *Red de Ciclovías Recreativas de las Américas* (Red-CRA) e com apoio da Organização Panamericana de Saúde (OPAS), do Centro de Controle de Enfermidades dos Estados Unidos (CDC), dos programas de Bogotá, Guadalajara e Santiago e do *Grupo de Epidemiología de la Universidad de Los Andes da Colombia* (EPIANDES), foi elaborado o *Manual para implementar y promocionar las ciclovias recreativas*.

Esta rede conta com 88 membros de administrações municipais, fundações e institutos públicos promotores do esporte, lazer e atividade física. Entre 2005-2019, foram realizados quatorze congressos em diferentes cidades latino-americanas para reunir os promotores que apresentaram suas experiências de gestão, debates para potencializar as iniciativas entre instituições públicas e setor privado.

Segundo o manual, são oito critérios considerados como bases operacionais para realizar este tipo de evento:

“

1) Vontade política das autoridades no desenvolvimento das atividades; 2) Viabilidade das vias públicas levando em consideração as características das instalações e desvios para veículos durante o evento; 3) Investimentos para a compra de itens e contratação de serviços e trabalhadores; 4) Aprovação do projeto indicando o circuito, sinalização, pessoal disposto na localização e funções e medidas de mitigação na circulação de veículos; 5) Realização de atividades por usuários com a oferta de água, alimentos e empréstimo de rodados; 6) Seleção de funcionários para garantir a segurança pública; 7) Aquisição de elementos, gestão de seguros e mídia; 8) Manutenção e supervisão da montagem (ESTRADA et al., 2009).

Estas bases operacionais são os elementos constituintes que se pretende problematizar por determinarem a composição local de forças que compõem os momentos da organização e gestão dos programas. Se para Foucault o governo é o conjunto de procedimentos e cálculos que articula poderes-saberes sobre o corpo individual e as populações, caberia interrogar se na sua atuação estratégica, é desenvolvido um investimento em tecnologias políticas de regulação das condutas favoráveis à constituição de ambientes apropriados à mobilidade ativa por bicicleta.

Estas tecnologias políticas ao serem determinadas por uma racionalidade política governamental que conforma as suas formas de agenciamento, nos cabe diagnosticar a lógica de operacionalização composta de técnicas e táticas específicas que geram condições de possibilidade para as práticas de mobilidade com bicicleta nas vias públicas e assim ampliar o seu uso na vida social.

Ao problematizar as ciclovias recreativas como uma prática social histórica e situada, procura-se diagnosticar a função desses programas nos termos da sua articulação com a diversidade de atores sociais envolvidos na sua organização. Se por um lado, o risco de acidentes é proporcional a aptidão física do indivíduo em pedalar nas vias públicas, por outro, as normativas que reordenam esses espaços envolvem o esforço do governo para propor um sentido de mudança.

A associação das ciclovias recreativas com a saúde pública está relacionada principalmente através dos efeitos da participação da população nesses programas. Isso ocorre principalmente nas iniciativas com operação regular, devido a temporalidade e espacialidade específicas para a sua realização, tendo como função promover a atividade física nas vias públicas.

Torres et al. (2009) realizaram uma revisão da literatura sobre programas de ciclovias recreativas e consultas a especialistas com 83 membros, da Rede de Atividade Física das Américas, de 19 países. Dos 55 programas encontrados nas Américas, 38 atenderam esta definição, a maioria implementada em ambientes urbanos, as comunidades variam em tamanho, a extensão e a duração variam de mais de 120 km por 7 horas, na maioria dos domingos, a 1 km por 2 horas em domingos alternados, a distância média de 15,6 km, duração média de 330 minutos por ano e a estimativa média de 78.384 participantes por evento.

Sarmiento et al. (2010) avaliaram as informações existentes desses 38 programas de ciclovias recreativas existentes em 11 países, por meio de uma revisão da literatura complementada por entrevistas e consultas com especialistas. Os autores constataram que a maioria dos programas ocorre em ambientes urbanos, variam de 18 a 64 eventos por ano que contam com duração de 2 a 12 horas, o comprimento das ruas varia de 1 a 121 km, o número estimado de participantes varia de 60 a 1.000.000 de pessoas e 71% dessas iniciativas incluem aulas de atividade física e, em 89%, as ruas estão ligadas a parques.

Montes et al. (2012) realizaram uma análise da relação custo-benefício da atividade física dos programas de Bogotá e Medellín na Colômbia, Guadalajara no México e São Francisco (EUA) com diretores e pesquisas locais. Para os autores, o custo anual per capita foi de US\$ 6,0 para Bogotá, US\$ 23,4 para Medellín, US\$ 6,5 para Guadalajara e US\$ 70,5 para São Francisco; a relação custo-benefício da atividade física para a saúde foi de 3,23-4,26 para Bogotá, 1,83 para Medellín, 1,02-1,23 para Guadalajara e 2,32 para São Francisco. No programa de Bogotá, a relação foi mais sensível à prevalência de ciclistas fisicamente ativos, em Guadalajara, foi mais sensível aos custos do utilizador e para Medellín e São Francisco, os custos operacionais.

Rojas-Rueda et al. (2020) quantificaram a saúde nos programas de ciclovias recreativas em 15 cidades latino-americanas, em relação a

mortes anuais da incidência de doenças cardíaca isquêmica, acidente vascular cerebral, diabetes tipo 2, câncer de cólon, câncer de mama e demência, anos de vida ajustados por incapacidade e economia de valores sobre mortalidade. Os benefícios estimados são de 1.101 mortes anuais evitadas com o incremento da atividade física, impacto econômico anual de 1.575 milhões de dólares e redução anual de 3.070 mortes.

Para Sarmiento et al. (2019) a saúde urbana está localizada na interseção dos Objetivos do Desenvolvimento Sustentável (ODS) três da saúde e bem-estar e onze de cidades e comunidades sustentáveis. Ao reconhecerem que as cidades são sistemas complexos, dinâmicos, heterogêneos, interligados e adaptativos, as decisões tomadas sobre a forma como foram construídas e vive-se nelas, têm um impacto profundo na saúde do planeta e no bem-estar e na saúde das populações.

A realização de eventos que promovem a atividade física em vias públicas, no Brasil, comumente está associada à realização de competições esportivas, em uma data específica, a cargo da secretaria de esporte. Ao contrário, os programas de ciclovias recreativas contêm uma regularidade de operação por estarem envolvidos em diversas instituições públicas e agentes privados, mas dada a complexidade de sua forma de governança, ainda é pouco esclarecida para atingir os objetivos propostos de ampliar o acesso da população à atividade física nesses espaços.

Castillo et al. (2011) realizaram dois estudos de caso da Ciclovía de Bogotá, Colômbia e da Curitiba Ativa de Curitiba, Brasil. As autoras concluem que a maioria das políticas que conduzem esses programas foram desenvolvidas fora do setor da saúde, esportes, meio ambiente e transporte, mas para serem bem sucedidas, devem ser tratadas de maneira multissetorial com base nos setores de recreação e planejamento urbano, para criar ambientes de apoio à atividade física.

Silva et al. (2017) analisaram os programas de ciclovias recreativas promovidos pela prefeitura de Curitiba, segundo o modelo lógico do Centro de Controle de Enfermidades dos Estados Unidos. Para os autores, esses programas apresentam características multissetoriais, sendo um fator importante para sua manutenção, apontar a necessidade de alinhamento entre recursos e produtos para conhecer seu custo-efetividade e o alcance dos objetivos, por meio da ampliação e a regularidade de ações informativas junto à comunidade, o que pode auxiliar no processo de construção de apoio político desses programas.

Meizel et al. (2013) analisaram as redes sociais de 25 organizações de saúde e não relacionadas à saúde que participam do Programa Ciclovía de Bogotá, por meio de um estudo transversal, empregando métodos analíticos de rede, baseados em uma análise visual descritiva e um modelo de gráfico aleatório exponencial. A análise mostra que as organizações mais centrais da rede estavam fora do setor da saúde e incluíam os setores de esporte e recreação, governo e segurança que funcionam em clusters formados por diversos setores.

Sarmiento et al. (2017) avaliaram a associação entre comportamentos de caminhada e participação entre adultos e idosos e os potenciais fatores associados ao Programa Ciclovía de Bogotá. Os adultos que relataram participar tinham maior probabilidade de caminhar 150 minutos por semana e, entre os idosos, morar em um bairro com corredores ofertados pelo programa foi associado a ter caminhado pelo menos 150 minutos por semana. Para os autores, as políticas de diferentes setores, o apoio comunitário e das autoridades locais na constituição de uma rede transnacional de especialistas defensores que compartilharam detalhes técnicos e administrativos para organizar um evento, influenciam a participação no programa.

Triana et al. (2019) avaliaram as associações entre atividade física, tempo sedentário, índice de massa corporal e participação no Programa Ciclovía com 923 crianças de 9 a 13 anos de escolas públicas em Bogotá. Os autores constataram que 46% das crianças já participaram, 34% relataram participar pelo menos uma vez por mês e não foram encontradas diferenças na média de minutos de atividade física moderada a vigorosa em dias de semana entre usuários frequentes e esporádicos.

Mejia-Arbelaiz et al. (2021) compararam as trajetórias espaciais dos participantes das ciclovias recreativas de Bogotá, Cidade do México, Santiago de Cali e Santiago do Chile de acordo com características de segregação urbana e avaliaram a relação entre os níveis de atividade física dos participantes e as características sociodemográficas. Os autores encontraram maior mobilidade em Bogotá e Santiago de Cali com participantes propensos a visitar bairros periféricos e os participantes da Cidade do México e Santiago do Chile permaneciam no seu meio de origem e concluem que as ciclovias recreativas podem ser inclusivas em ambientes urbanos ao facilitar interações entre diferentes grupos socioeconômicos.

Higuera-Mendieta et al. (2022) buscaram determinar até que ponto o método de ciência cidadã Nossa Voz facilitou a interação entre a pesquisa e a prática para fazer mudanças no Programa Ciclovía. Os autores avaliaram a receptividade dos tomadores de decisão e participantes a este método e analisaram suas contribuições para o exercício dos direitos recreativos e de saúde em Bogotá. Para os autores, o Nossa Voz melhorou a comunicação entre os participantes e os tomadores de decisão ao fornecer uma compreensão sistematizada das experiências dos usuários para implementar mudanças e melhorias do treinamento da equipe do programa.

A partir de pesquisas sobre o Programa Ciclovía de Bogotá, tem-se constatado uma associação positiva entre infraestrutura cicloviária e ciclovias recreativas, com influências no comportamento da mobilidade ativa por bicicleta em Bogotá.

Cervero et al. (2009) examinaram como a rede de ciclorrutas e o Programa Ciclovía estão associados ao comportamento de caminhar e pedalar e participação no programa. Para os autores, embora os projetos de infraestrutura cicloviária estejam associados à atividade física, outros atributos do ambiente construído, como a densidade e as misturas de uso do solo, não estão. Isto provavelmente ocorreu porque a maioria dos bairros em áreas urbanas de Bogotá evoluíram durante uma época em que viagens não-automobilísticas eram maioria, sendo uniformemente compactos na sua composição e com níveis comparáveis de acessibilidade aos transportes.

Torres (2011) demonstrou como o Programa Ciclovía e a rede de ciclorrutas em Bogotá, representam duas abordagens políticas e ambientais construídas que aumentaram o acesso para as atividades físicas das mobilidades ativas. A autora ao examinar a relação entre frequência de participação associada ao cumprimento das recomendações de atividade física com as características de uso do programa, constatou que a maioria dos participantes relataram atender à recomendação da mobilidade ativa no lazer e de ciclismo para transporte.

Em outro estudo da mesma amostragem, Torres et al. (2013) compararam os participantes dos programas Ciclovía e ciclorrutas em dois estudos transversais, um entre 1.000 participantes da Ciclovía e outro entre 1.000 participantes das ciclorrutas. A maioria dos usuários da *ciclorrutas* relatou residir em categorias de baixo nível socioeconômico, ter menor escolaridade e não possuir automóvel. Os autores concluem que esses programas promovem a atividade física de forma equitativa e oferecem alternativa de mobilidade em ambientes urbanos complexos.

Teunissen et al. (2015) analisaram os níveis de desigualdade no acesso em três iniciativas de transporte sustentável em Bogotá a partir de informações espaciais e de estrato socioeconômico. Para os autores, a rede de ciclorrutas e a Ciclovía não oferecem acesso igualitário, especialmente para estratos socioeconômicos de rendimentos baixos e médios. Os autores concluem que a Ciclovía proporciona inclusão social ao proporcionar acesso a locais de interesse, mas não oferece acesso igual a todos os segmentos da população.

A sustentabilidade dos programas de ciclovias recreativas está relacionada com recursos financeiros disponíveis para gestão logística e de pessoal qualificado para sua manutenção. Para tanto, são diversos os fatores que influenciam na regularidade da operação em vista de que o financiamento determina a estrutura de operação.

Castillo et al. (2017) identificaram nos programas comunitários de atividade física dos governos distrital e nacional da Colômbia, as características de financiamento, capacitação e os desafios presentes na operação desses programas. Os resultados demonstraram os processos de adaptação para enfrentar os desafios de crescimento com base na flexibilidade/adaptabilidade, investimento nas condições de trabalho e formação de instrutores, alocar fundos públicos e solicitar responsabilização, diversificar recursos, ter apoio comunitário e defensores em diferentes níveis e posições para incluir a atividade física em políticas públicas.

Sarmiento et al. (2017) buscaram descrever as características de 67 programas regulares e os fatores que influenciaram a sua sustentabilidade. As autoras constataram que a maior expansão ocorreu desde 2000, o número de participantes por evento variou de 40 a 1.500.000 e a extensão variou de 1 a 113,6 km. A maioria das vias conectam bairros de renda média-baixa e alta e conta com a participação de populações minoritárias. As autoras concluem que todos os programas partilhavam apoio governamental, alianças, apropriação comunitária, defensores, compatibilidade com a organização anfitriã, capacidade organizacional, flexibilidade, benefícios e estabilidade de financiamento, mas diferiam em fontes de financiamento e alianças.

Para quantificar as diferenças de sustentabilidade entre programas, Abolghasem et al. (2018) desenvolveram uma metodologia DEA que mede a eficiência comparada de desempenho entre cada ciclovía recreativa com um sistema de referência que identifica as suas fontes de ineficiências e oferece recomendações para melhorias. Os autores apresentaram um Sistema de Apoio à Decisão (SSD) centrado na metodologia DEA baseado em planilhas de avaliação.

Com base no estudo anterior, Castillo et al. (2018) apresentaram a ferramenta de avaliação de ciclovias recreativas denominada Bicis de Calidad. Esta qualificação envolve os critérios de extensão e duração, acessos e atrativos, usuários, serviços, inclusão social e segurança e critérios relacionadas à organização, avaliação e monitoramento. Dos 365 programas, 73 responderam ao questionário, são 15 programas na qualidade três, 35 com qualidade dois e 19 com uma bici de calidad (Rio de Janeiro, a única cidade brasileira a participar). São oito programas referentes: Rosario (Argentina), Bogotá, Cartago, Envigado, Pereira e Soacha (Colômbia), Guadalajara (México) e Portland (EUA).

Com o desenvolvimento das ciclovias recreativas em diversos países a partir do exemplo do Programa Ciclovía, tem surgido o interesse em compreender as relações entre conhecimento, poder e governança. Montero (2017) examina criticamente o caso de Bogotá ser enquadrado como exemplo de melhor prática, lançando luz sobre as constelações de atores, redes e agendas locais e transnacionais que moldaram o programa desde o seu início experimental, na década de 1970, até a sua construção internacional na década de 2000.

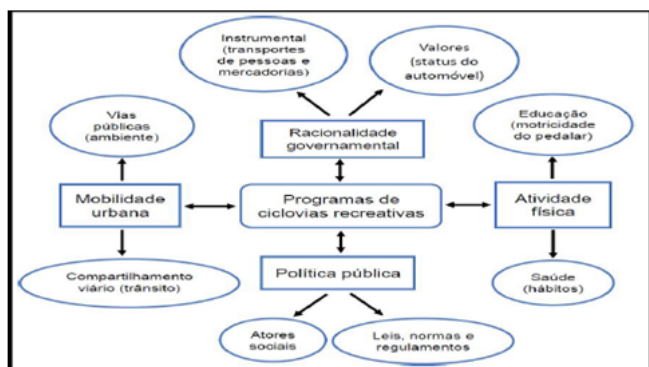
Segundo Montero et al. (2023) estas abordagens experimentais para formulação de políticas têm ganhado popularidade nas últimas décadas para intervir em problemas urbanos. No entanto, a evidência destaca como esta linguagem tem sido cooptada por formas de governação que contornam a instituição de planejamento existente em meio a assimetrias de poder na sua operação, relacionam-se a uma política global econômica específica de financiamento desses programas.

Buscando aprofundar o conhecimento em torno das pesquisas que tentam problematizar as diversas estratégias de poder e táticas de governo, no interior da ciclovía recreativa de Bogotá, há destaque para o trabalho da Profa. Astrid Bibiana Rodríguez Cortés intitulado “*Subjetividades en el espacio público. La Ciclovía de Bogotá*” que construiu uma genealogia histórica das emergências e das condições de possibilidades com o entorno da primeira ciclovía recreativa latino-americana.

A autora estabelece três formas de problematizar o espaço público da ciclovía bogotana: a) o consenso do bem-estar social, a convivência saudável e a placidez visual são privilegiados para a produção de espaços sociais; b) a ciclovía de Bogotá pode ser considerada um grande palco por toda a cidade e que combina diversos contextos expressões socioespaciais e artísticas e culturais; c) a ciclovía bogotana demarca formas de relacionamento com as ruas por meio do exercício do corpo, lazer e educação, a fruição pessoal e coletiva fazem parte de seus slogans. As perspectivas levantadas reúnem elementos para investigar dois problemas: 1) a produção da subjetividade, como construção sociocultural, fabricação, modelagem e consumo; 2) o espaço público como poder e governo (RODRIGUEZ, 2017).

3. Considerações finais

Como síntese teórica deste ensaio, propõe-se um diagrama analítico da correlação de forças dinâmicas constituintes nos programas de ciclovias recreativas.



Fonte: Troncoso (2024)

Figure 2. Diagrama de análise dos programas de ciclovias recreativas

Entende-se que estes programas ao serem demarcados por leis, decretos e regulamentos que definem suas respectivas organizações institucionais, os discursos dos gestores e as regulamentações políticas, foram arquivos que colaboraram na construção de um cenário epistêmico de saberes para estabelecer um regime de verdade da mobilidade ativa constituída como forma de governo nesse trabalho. A organização do evento se constitui como tecnologia política, por meio de suas lógicas de operacionalização específicas e variáveis ao contexto de sua execução. Assim sendo, estes programas se constituem como uma ferramenta particular de gerenciamento da conduta ciclista que colabora progressivamente para formar novos

adeptos, por meio de uma forma dialógica específica de sensibilização ao educar sobre o uso da bicicleta, transformando a ambiência desses espaços públicos livres.

Diante da situação dramática de promoção de políticas públicas com vistas ao pedalar com segurança, no compartilhamento viário metropolitano, buscou-se problematizar o agenciamento da mobilidade ativa por bicicleta, por meio dos programas de ciclovias recreativas, entendendo que a população motorista ainda não está preparada cognitivamente, para ceder espaços viários para implementação de infraestrutura cicloviária, assim definido nas principais normativas brasileiras. Por fim, sendo uma prática governamental singular, com relações de poder específicas, o seu desenvolvimento operacional tem implicado novas condições de possibilidade para adesão massiva ao seu uso cotidiano com a formação da subjetivação ciclista no interior do conjunto de instituições, procedimentos, análises e cálculos da gestão estatal de trânsito qualificada desta forma de mobilidade ativa.

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Subject Index

Technical concepts and key subjects are indexed at their verified discussion pages.

KEY SUBJECTS Addiction • Bicycling • Ethics • Greek • Utopia • Biopsychosocial-Spiritual • Ciclovías Recreativas • Morality

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4. **Editorial Decision:** Based on reviewer recommendations, the Editorial Board renders one of three decisions: *Accept*, *Revise and Resubmit*, or *Decline*.

B. Complete Review Report & Research Assessment Sheet

Upon completion of the review, you will receive a **comprehensive Review Report** along with a detailed **Research Assessment Sheet**. These documents provide:

- Line-by-line reviewer comments keyed to **specific line numbers** in your typeset manuscript, enabling precise, unambiguous identification of every comment.
- A structured assessment covering originality, significance, clarity, methodology, and overall quality.
- Constructive feedback and actionable suggestions for improvement.

C. Responding to Reviewer Comments

Addressing reviewer feedback is simple and flexible. You have two options:

Option A - Author Dashboard: Log in to your Author Dashboard, navigate to **Manage Submission**, and create a **support ticket**. Simply quote the relevant line numbers from your review report and clearly describe your corrections or responses.

Option B - Email: If the Dashboard is not convenient, you may simply send an email with a numbered list of corrections referencing the line numbers, along with your responses to each reviewer comment.

Important: You do **not** need to reformat the document yourself at any stage. Our production executives will implement all your requested text changes directly in the typeset manuscript. Reviewer comments may be addressed and resolved right up until the Early View stage.

IV. Publication Lifecycle: Complete Transparency

A. Early View (Galley Proof)

- Upon acceptance, a **galley proof** (Early View edition) of your article is prepared according to the journal's publishing schedule.
- The Early View version includes **line numbers** for convenient reference during final corrections.
- You may still provide corrections at this stage by referencing specific line numbers via email or the Author Dashboard.

B. Ahead of Print

- Following the Early View, an **Ahead of Print** version is published before the final issue compilation.
- This version represents the final, corrected article but **does not yet include Volume or Issue numbers**.

C. Digital Publication (eJournal)

- After all corrections are finalized, the **digital eJournal edition** is published with line numbers removed.
- Your article receives its official **DOI (Digital Object Identifier)** and is indexed across global academic databases.
- The article becomes freely and permanently accessible online under our open-access policy.

D. Hardbound Print Publication

- Approximately **15 days after digital publication**, the article enters our offset production pipeline.
- Your research is printed in **premium hardbound volumes** and distributed to institutional subscribers, major university libraries, and social science research centers worldwide.
- The corresponding author receives a **complimentary hardbound copy** dispatched via government courier at no additional cost.

V. Advanced Technology & AI-Enabled Research Broadcasting

While GJHSS is rooted in the traditions of humanistic and social inquiry, our publishing infrastructure harnesses the latest advancements in technology to maximize the impact and discoverability of your scholarship.

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- **Premium Hardbound Print Editions** for institutional archives and personal collections.
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- Optimize article metadata for maximum **Search Engine Optimization (SEO)**, ensuring your paper appears prominently when scholars search for your research topics and theoretical frameworks.
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B. Conflicts of Interest & Funding Transparency

Authors are required to disclose all sources of funding and any financial or non-financial conflicts of interest. Full transparency is mandatory and is enforced at every stage of the publication process.

C. Data Availability & Reproducibility

Authors are encouraged to make their datasets, interview transcripts, survey instruments, and supplementary materials available in recognized repositories to support the reproducibility and verifiability of their findings. A data availability statement is required in all published manuscripts.

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IX. The $\LaTeX$ Author Package (Entirely Optional)

For researchers who already compose their manuscripts in $\LaTeX$, we provide a comprehensive, professionally designed **$\LaTeX$ Author Package** (`gj-author`) featuring STIX Two serif typography, TeX Gyre Heros sans-serif headings, complete Unicode math support, and brand-coordinated layouts.

However, we must emphasize:

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