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**The Organising Principles of the Society of
Jesus - from the Pastorate to Governmentality**

by

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Figure 1 - "The Origins of the Jesuit House" (c.1620, woodcut), Unknown Author. Printed with permission of the Herzog August Bibliothek.

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3. Abstract

Foucault's concepts of Pastoral power and "governmentality" have led to the development of the London school of "governmentalists" (McKinlay and Pezet 2010). However, extant literature on governmentality drawn from this school of thought has undertaken an analytics of power centred on the deployment of governmental forms of power at the State level, not taking into consideration another entity that emerged after modernity, the modern enterprise, and not going beyond the 19th century, thereby trapping "governmentality" studies inside their own modern discourse.

Following Foucault's established relation between Pastoral power and "governmentality", this thesis analyses the form of organising deployed by an organisation that emerged in the 16th century, apparently being able to survive into modernity without adopting modern managerial business categories. This organisation is the Society of Jesus, commonly known as the Jesuits.

The first part of this thesis will analyse the relevance of the Society of Jesus for organisational studies and will show how modern business categories fail to explain its structural resilience. The second part of the thesis introduces Pastoral power as a possible explanation for the apparent structural resilience of the Society of Jesus. Following this line of reasoning, and after having established an analytics of power as a possible methodological framework, the Society of Jesus' "organising practices"

The Organising Principles of the Society of Jesus will be presented, leading to the conclusion that this entity, having emerged at the cornerstone of modernity, deployed practices that represent a significant shift when compared with previous Pastoral forms of organising. The fact that the Society of Jesus clearly intended to deploy practices for the conduction of geographically-dispersed individuals leads to the conclusion that it deployed a “protogovernmental” form of power, and that the rationality underpinning its practices, although not entirely modern, is clearly at the cornerstone of modernity and can therefore be enlightening to an understanding of how modern managerial categories might have emerged.

4. Introduction

This thesis is not about just religious organisations, but about the construct of organisations as such and its applicability. It further addresses the emergence and nature of the Jesuit “*corpus*”, and how it differs from earlier religious entities within the Catholic Church. The Society of Jesus is a version, distinct but early, of what later emerges as the modern organisation and as the processes of organising; as such, it has a new kind of structuring which takes shape as a particular, unchanging structure. However, this resilient structure is a first version of a more general structuring, entailing a staff function and enabling centripetal forces to play inside the structure, allowing the easy replication of versions of the structure over and over, and enabling a large body across the globe to be constructed out of these small bodies. Following Foucault’s analysis of “governmentality”, the way the Society of Jesus structured itself is aligned, on the one hand, with a bottom-up analysis, which begins from how men think and act. On the other hand, the Society of Jesus uses accounting both for economic matters and for the care of self and the examination of conscience, integral to the processing, though without the imposing of numbers on human performance, as in the late 18th century way.

Etzioni’s (1975) seminal work on organisations, and what could be called modern Organisational Theory, is one amongst many works that have addressed religious organisations. Religious organisations have been scrutinised by extant literature from different theoretical approaches, such as the economy of religion (Iannaccone 1998),

The Organising Principles of the Society of Jesus leadership (Etzioni 1975), organisational structure (Demerath III 1998), strategic management (Miller 2002) and organisational change (Bartunek 1984). The relevance of religious organisations to the various theoretical fields that surround Organisational Studies, although widely accepted, seems, however, to be unexploited (Dimaggio 1998), and several questions remain unanswered.

Among these unanswered questions, I have been drawn towards one that is particularly interesting: what is the relation between strategy and structure in religious organisations? A closer read of the above-mentioned studies on religious organisations draws attention to the importance of one particular dimension: their organisational structure. Dimaggio (1998) and Miller (2002) explicitly call for deeper research on the organisational structure of religious organisations. These calls for research are understandable, given the fact that modern management literature relies heavily on the assumption that organisational structure directly influences the strategy of an organisation (Chandler 1962), and consequently its performance. Following this line of reasoning, Mintzberg (1979, p. 100) associates the apparently good performance of religious and military organisations to their organisational structure dimensions.

Modern approaches to Organisational Studies, and organisational structure literature in particular, had, after Weber and Durkheim's contributions, two further major shifts: the first, after the linguistic turn (Hatch and Yanow 2008) and the second, after the analytics of power (Thompson 2003; Barratt 2008) that followed Foucault's work. Both the linguistic turn and the Foucauldian analytics of power allowed the

emergence of new contributions to Organisational Studies literature and to new methodological approaches, such as, for example, those based on different analyses of discourse (Phillips and Hardy 2002; Heracleous 2006), and the contributions of Townley (1993), McKinley and Starkey (1998), among others.

Organisational structure's dimensions have been treated as either natural givens by modern Organisational Studies literature, or as discursive constructions used to legitimate power arrangements by postmodern and critical management studies. From the philosophical point of view, these approaches, by putting the emphasis on *a priori* assumptions and on the role of discursive structures, have to a greater or lesser extent centred their analysis on the relationship between a structure and the Subject. Giddens' "structuration theory" (Giddens 1979; Giddens 1984) is probably one of the most important contributions to the debate around the relationship between a structure and the Subject. However, whilst not always as explicit as in Giddens' approach, the nature of the relationship between a structure and the Subject has always been the main, overarching philosophical assumption underpinning different conceptions of power, which ultimately have led to different approaches to the assessment of organisational structure dimensions.

Religious organisations can have the capability to extend knowledge on organisations insofar as, on the one hand, they seem to be relatively unexploited (Dimaggio 1998) and, on the other hand, the longevity that typically characterises them is outstanding, with some of these organisations having been founded long

before modernity, which raises the interest in the adoption of either longitudinal or historical methods of analysis (Miller 2002).

In this sense, Foucault's later work seems to have the potential to unsettle the above assumptions on how to address organisational structure's dimensions. Foucault's historical analysis identified a different form of power, governmental power that sheds light on the relationship between the Subject and the State (Foucault 2010). Foucault's analysis of what he termed "governmentality" is framed by a new analysis of power relations, which one could refer to as "analytics of government" (Dean 2010), underpinned by historical *a priori*'s, as opposed to natural or discursive ones. In this sense, an analytics of government, as devised by Foucault, traces historically the emergence of present forms of power relations and structural arrangements, namely the modern social welfare State. Governmentality studies, as this approach has been termed have followed Miller and Rose's seminal work (Miller and Rose 1990) and later developments (Rose 1999; Miller and Rose 2008). This doctoral research thesis is an attempt to move previous assumptions of power, in the context of organisational structure's explanations for the emergence of modern organisational forms, towards a governmental form of power, using a historical analysis methodology.

Governmentality as the "conduct of conduct" emerged, according to Foucault (2009), around the 16th century as a development of a previous form of power, which he calls Pastoral power. Pastoral power is a form of power exercised by Christian

Pastors¹ throughout the mediaeval period over individuals and groups of individuals (the “flock”²). As defined by Foucault (2009), Pastoral power characterises Christendom, especially in the Western world where its influence was greater. In this sense, one could say that Pastoral power is a form of power that influenced to a greater extent the Western Catholic Church until at least the 16th century. This does not mean that Pastoral power started to fade after the Reformation; such an assertion could not be sustained without contempt. However, in Foucault’s analysis, Pastoral power is framed in a particular period, and its transposition to other forms of religious practice or to other social settings, such as the large modern organization, has not been thoroughly examined. Extant literature on Foucault’s analysis of Pastoral power also follows such a line of reasoning (Dean 2010), mainly centring the analysis of Pastoral power on its influence on the emergence of the modern social welfare State.

Besides having restricted the analysis of Pastoral power to mediaeval Christendom, Foucault also treated Pastoral power as concerning all forms of relations between a Pastor and an individual or a group of individuals. This means that Pastoral power was addressed as a concept capable of describing a particular form of power unknown until Foucault’s (2009) analysis, as well all the social settings that emerged in the Roman Catholic Church³, namely its Religious Orders. In this sense, the present doctoral research thesis will not adopt an “underlabourer” (Spoelstra 2007; Spoelstra 2007) conception of philosophy in which philosophy is “something that

¹ Commonly known as “Priests”.

² What is usually known as the Parish, or the Monastery and the Convent.

³ Henceforth referred to as the Catholic Church.

happens outside of organisation studies” (Spoelstra 2007, p. 4), yet as a discipline underpinning organisation studies through the creation of concepts capable of “creating a philosophical problem of organisation” (Spoelstra 2007, p. 4). Hence, the remainder of this doctoral research will use the concept of Pastoral power to attempt to arrive at an explanation of particular forms of organising devised by Christendom, especially the Catholic Church’s Religious Orders.

Although Foucault defined the concept of Pastoral power as characteristic of all Christendom, he did mention the relevance of Religious Organisations to an understanding of how the Catholic Church deployed such a unique form of power (Foucault 2009). An understanding of how religious organisations deployed Pastoral power is therefore of the utmost importance not only for Organisational Studies as a field of knowledge (as previously explained), but also as a means to shed light on how Pastoral power might have emerged into modernity as a governmental form of power (Foucault 2009). However, research into the different ways Religious Organisations deployed Pastoral power lies beyond the scope of the present doctoral research. As a consequence, only one Religious Organisation will be analysed given its extreme importance, acknowledged by extant literature, for the 16th century Catholic Church. Such a Religious Organisation is the Society of Jesus, also known as the “Jesuits”, whose importance has been recognised by Foucault (1991).

The Society of Jesus, founded in 1540, was the first modern Religious Organisation (Francis 1950) and is, presently, the largest Religious Order in the Catholic Church. An understanding of how the Society of Jesus deployed a Pastoral form of power is

of the utmost importance because, on the one hand, it was founded at the cornerstone of the deployment of a governmental form of power and, on the other hand, it has managed to survive into the modern managerial world without any apparent significant changes in its governance mechanisms. The present doctoral research will therefore be focused on how the governance mechanisms of the Society of Jesus emerged, what their relation with Pastoral power is as defined by Foucault (2009), and how the Society of Jesus managed to survive into modernity without adopting modern managerial categories for its own conduction and the conduction of its members.

Neither Etzioni (1975) nor Mintzberg (1979) refer to the Society of Jesus as particularly relevant to an understanding of some dimensions of organisational structure as defined through modern categories. However, as previously stated, modern categories of organisational structure's definitions have been used to address the emergence of modern forms of organization. In this sense, the analysis of the Society of Jesus' own categories might shed light on possible historical *a priori's* of modern organisation's categories, fostering an understanding of how the latter historically emerged.

Right from its inception and throughout its history, the Society of Jesus has always been involved in some type of controversy. Some of the controversy was always supported by historical documents with little or no conformity with reality, such as

the infamous *Monita Secreta* (Franco and Vogel 2002)⁴. However, the most relevant aspects of the criticism of the Society of Jesus arose from the Catholic Church and concerned the main governance mechanisms devised by Saint Ignatius of Loyola, the founder of the Society of Jesus (O'Malley 1993). Unlike the type of controversy generated by texts such as the *Monita Secreta*, which had a libellous character, the debate that surrounded the main governance mechanisms envisaged by Saint Ignatius of Loyola was centred on the significant changes he had intended to introduce in previous arrangements for the government of Religious Orders, which had been the subject of debate and improvement for more than ten centuries within the Catholic Church. The controversy around the governance mechanisms devised by Saint Ignatius of Loyola draws attention to their relevance. An understanding of the reasons behind the deployment of such governance mechanisms, especially when compared with other governance solutions adopted by previous Religious Orders, sheds light on two points: on the one hand, Pastoral power was not always deployed in the same manner by different Religious Orders; on the other hand, the emphasis on different governance mechanisms seems to be closely related with the engagement, by the Society of Jesus, with a different type of Mission. The latter could be associated with what modern management literature refers to as the relation between strategy and structure.

Long before Saint Ignatius of Loyola decided to transform his Paris group gathered in Paris to follow his “way of life” into a Religious Order, another important

⁴ The *Monita Secreta*, written in 1614, is probably the most famous text against the Society of Jesus and was written by a Polish Priest, who was not a Jesuit. The text consists of what the author claims to be a group of confidential instructions given by the Society of Jesus to its members, and reflects, in many parts, the most important chapters of the Constitutions of the Society of Jesus.

The Organising Principles of the Society of Jesus innovation introduced by him, the Spiritual Exercises, were also considered suspicious by the Catholic Church's Inquisition. The Spiritual Exercises, which are not intended for the government of any type of entity but for helping an individual to take decisions (Rahner 1971), were the object of a strict evaluation by the Inquisition, given their apparent nonconformity with the Catholic Church's doctrine, especially in what concerned the government of an individual's life and their supposed approval of the possibility of direct communication with God, resembling a superficial mysticism such as that advocated by Saint Ignatius of Loyola's contemporary sectarian group, known as the *Allumbrados*⁵ (Rahner 1964). It appears, therefore, that the Society of Jesus' shift in the way Pastoral power was deployed is characterised by changes in two types of practices. Not only were the practices for the "conduction" of the entity (the "flock" in Foucault's terminology) significantly changed, but also the practices for the conduction of each individual (as a member of the "flock", in Foucault's terminology).

Saint Ignatius of Loyola, upon the foundation of the Society of Jesus, laid down a group of governance mechanisms with the purpose of conducting both the individual and the entity. It is possible, schematically, to separate the governance mechanisms aimed at the government of the individual, from those aimed at the government of the entity. As previously stated, these governance mechanisms represent a clear shift from previous practices used for the government of Religious Orders. Nonetheless, Saint Ignatius of Loyola followed, in some detail, previous founders of Religious Orders, mainly by writing the Constitutions for the government of the Society of

⁵ "*Allumbrado*" might be translated into English as "Illuminated".

Jesus. The Constitutions are the parallel of what was known as the Rule, for instance the Rule of Saint Benedict. The Rule in a Religious Order had one main purpose: to guarantee uniformity of behaviour amongst the scattered monasteries. Notwithstanding the relevance of uniformity of behaviour amongst all the Jesuits, the Constitutions of the Society of Jesus are a text of a different nature from those of traditional Religious Orders' Rules. Underpinned by the Spiritual Exercises (Bertrand 1974), the Constitutions are intended for the government of the individual and the entity. The latter, however, is not to be governed as a group of monasteries scattered geographically, yet as a "body" with no specific geographical location (*id est*, with no national frontiers) except its centre, which was to be located in Rome, where the Pope always lives. Traditionally, Religious Orders did not have a "supranational" character (Knowles 1966, p. 53). The Dominicans, together with the Society of Jesus, were the only Religious Orders that devised a set of governance mechanisms aimed at the government of a supranational entity (Knowles 1966). Nevertheless, the Society of Jesus still represents a major shift insofar as the Dominicans may be seen as a transition from the monastic type of Religious Order to the modern type (Knowles 1966).

One of the most important elements of transition from monasticism to modern Religious Orders is the relationship between the Abbot (or the Pastor) and those that he governs (either as individuals, or as a flock). The Abbot, which has etymological roots as "Father", did indeed have a paternal relationship with the individual members of a monastery. This paternal relationship was at the core of the Pastoral form of power, framed by monastic Rules and the Pastoral practices of Direction of

Conscience and Confession. After the Constitutions of the Dominicans and the Society of Jesus, the type of relationship between the Superior (no longer the Abbot) and the individuals, and the set of practices deployed, changed significantly towards, as this doctoral thesis contends, a modern governmental form of power as defined by Foucault (Foucault 2009), where the conduct of a population and of its individual members are the object of government. Either the Society of Jesus' governance mechanisms, or those previously deployed by several Religious Orders founded during the medieval period, can extend knowledge on how Pastoral power led to a governmental form of power, as argued by Foucault. Religious Orders, and the Society of Jesus in particular, can, through the analysis of their governance mechanisms, also contribute to an understanding of how a governmental form of power can underpin social settings, rather than the State.

The remainder of this doctoral thesis will therefore attempt to trace the emergence of a governmental form of power in the Society of Jesus, following a structure divided into three main parts.

The first part will present the relevance of the Society of Jesus for organisational studies. Extant literature on either the Society of Jesus or religious organisations has focussed attention on structural resilience. However, extant modern managerial literature has failed to fully account for not only its structural resilience, but also how the Society of Jesus managed to survive into modernity without adopting modern business categories. Therefore, and following Foucault's later work, a different approach to the Society of Jesus' way of structuring its activities will be taken.

An account of the relevance of the concept of Pastoral power in organisational studies will be provided, leading to the assertion that these have been absent, just like Governmentality studies. The Society of Jesus will therefore emerge as a particularly interesting object of research insofar as, on the one hand, extant organisational studies literature has not thoroughly analysed religious organisations, and, on the other hand, Foucauldian studies on Governmentality have been centred on the State. Foucault (2009) traced the emergence of Governmentality around an analysis of liberal forms of State government; this was followed by, amongst others, Miller and Rose (Miller and Rose 1990; Rose 1999; Miller and Rose 2008). Foucault's later work was also centred on the construction of the individual subject and the family (Foucault 1981; Foucault 1990; Foucault 1992). Therefore, other forms of entity between the family and the State have been absent from the extant literature on Governmentality and Pastoral power.

The second part of this thesis will analyse the Pastorate after a close reading of Foucault's contribution to the understanding of this particular form of power. This part describes the development of Religious Orders in the Catholic Church, emphasising how the former have deployed different governance mechanisms. At the end of the first part, religious organisations, and Religious Orders in particular, will emerge as giving social reality to the type of social body that Pastoral power assumes, inserted in a specific space and time (Carrette 2000). Religious Orders were organised around one problematisation: how to guarantee uniformity of behaviour inside the Monastery. This problematisation gave rise to two practices, Confession

The Organising Principles of the Society of Jesus and the Direction of Conscience, leveraged by the knowledge of the inner truth of the individual verbalised in Confession and in the Direction of Conscience. It is through following the concepts of problematisation, technology/practice and knowledge that Governmental power and Governmentality as a methodology will be unfolded. The question of conduction, after the definition of Governmentality, becomes apparent, and the review on organisational structure's literature will demonstrate that it served a particular social body: modern organisational forms. In addition, the literature on organisational structure is based on an attempt to identify structural dimensions or, in accounts after the linguistic turn, on an attempt to assess whether social reality is constructed by the agent or is an independent reality. Organisational structure has been a way, therefore, of a critical account as devised by Foucault. *Id est*, Foucault's later work and his Kantian critique did not underpin the research on organisational structure. On the other hand, philosophy has been the “underlabourer” (Spoelstra 2007) which means, as outlined before, that it has not been used to conceptualise organisational studies, rather to justify methodological choices and ontological stances. The present doctoral thesis will attempt to enlighten the understanding of what power means, particularly Pastoral and Governmental power, and how these concepts can shed light on forms of organising beyond those that emerged during modernity and might be historically contingent.

Throughout this part, Governmentality will also be introduced as a distinct form of power that emerges from the Pastorate, critically pointing to several questions that arise from Foucault's later work, namely the absence of a thorough analysis of a Religious Order to sustain his argument, and the fact that he does not take into

account the possibility that the Pastoral form of power might itself have suffered shifts that can explain its later development into a governmental form of power.

The third part of this thesis will trace the emergence of the main governance mechanisms of the Society of Jesus through an analysis of the Constitutions and of the main practices devised by it. The third part will be divided in three main chapters. The first chapter will analyse the *Formula of the Institute* and the Constitutions of the Society of Jesus; the second chapter will analyse the main governance mechanisms of the Society of Jesus; the third and final chapter will analyse the Spiritual Exercises of Saint Ignatius of Loyola. Throughout these chapters, the relevance of the practice of correspondence in the government of the Society of Jesus, and the Constitutions of the Society of Jesus with its main particularities, will be explained.

The main results of the present research will be drawn from the reading of Saint Ignatius of Loyola's "subtext" on the government of the Society of Jesus. Supported by the reading of the Constitutions, the Spiritual Exercises and secondary historical sources, the governance mechanisms of the Society of Jesus will be presented as the practices that fostered a shift, in the midst of the 16th century, in the Pastoral form of power at three different levels: at the notion of Pastor, at the conduction of everyday life and at the government of a religious "body" centred on a Constitutional text.

The changes introduced by Saint Ignatius of Loyola in the government of a Religious Order appear to be fundamental to an understanding of the emergence of a governmental form of power. Although the Society of Jesus' Constitutions do seem

to be influenced by previous Religious Orders' Rules, insofar as some of its chapters are almost entirely copied from Saint Benedict's seminal Rule (Aldama 1989), the impact of the latter is restricted to the Sixth part of the Constitutions, which deals with the religious way of life, characterised by the vows of Chastity, Poverty and Obedience. What distinguishes the Society of Jesus' practices of government is therefore beyond a mere comparison with previous practices. The changes introduced by Saint Ignatius of Loyola in the election mechanisms of the Superior, the mere fact that the Superior is not to be named as an Abbot, and the changes introduced in the everyday life of the Jesuits, who are not to be named as Monks, are underpinned by a shift in the conception of the Pastorate.

The form of power deployed by the Society of Jesus departed from the traditional Pastoral power towards a governmental form of power. The need to control its members at a distance led the Society of Jesus to envisage a new set of practices, different from the practices that were associated with Pastoral forms of power and identified by Foucault (2009). These new practices, which are the Account of Conscience and the regular Correspondence, are deployed to govern the entity, enlightened by the need not to save the soul of each one of its members, as was the case with previous Religious Orders, but by the necessity to assign to each member a mission aligned with the interests of the Society of Jesus as a "body". However, the recognition that the "body" cannot be conducted without also conducting each of its members' own conduct results in the deployment of a set of practices aimed at the individual subject. These practices, centred on the Spiritual Exercises, are the Direction of Conscience and the Third Probation. Although the Third Probation is

one amongst many other practices that form part of the training of a Jesuit, this practice is of utmost importance insofar as it is after the Third Probation that a Jesuit can be elected a Professed member of the Society of Jesus. The Professed Jesuit, whose individual conduct is inscribed in the so called “way of proceeding” typical of a Jesuit, represents the ideal of “subjectivation” referred to by Foucault:

“Analytical identification, subjection and “subjectivation” are the characteristic procedures of individualisation that will in fact be implemented by the Christian pastorate and its institutions” (Foucault 2009, p. 184).

The vow of obedience, therefore, although described in the Sixth part of the Constitutions in terms that resemble previous Religious Order’s Rules, is to be understood as having a different extent in the Society of Jesus. The severity of the vow of obedience in the Society of Jesus, although erroneously infamous, does not rely on a hierarchical form of power for the conduction of the subject, rather in the assurance, after the Third Probation, that each individual’s conduct is conducted by the Superior without compromising the subject’s autonomy.

The Society of Jesus is therefore at the cornerstone of the deployment of a governmental form of power that will, later in the 18th century, emerge in the form of the liberal welfare State, yet but does not seem to have emerged in other modern forms of large “supranational” organisations.

Having addressed the Society of Jesus' Governmental form of power, dividing the analysis of its practices along the entity and the subject levels, the critical discussion chapter will conclude that the governance mechanisms deployed were centred on the "problematization" of how to govern geographically-dispersed members without losing uniformity of behaviour and doctrine. The Practices deployed at the entity level and at the individual level are coherent with this problematization, and point to the deployment of a different form of power, enabling the understanding of how Pastoral power gave way to a Governmental form of power. All these practices assume the possibility of a different type of knowledge, the "knowledge of the individual" (Rahner 1964), verbalised via correspondence and the Account of Conscience. These will lead to the deployment of a "protogovernmental" form of power, with the purpose of assuring the "conduct of conduct", which represents a shift in the way Pastoral power was deployed, being at the cornerstone of modernity. The Pastor is now a wise Superior, the "flock" is a population without territory, and the management of individual everyday life is not based on heteronomous practices that coercively constrain behaviour, but on the assumption of the possibility of autonomous behaviour based on the deployment of practices that build a "space of desire" (Certeau 1973) limiting the individual's set of possible actions.

Part 1 – Religious Organisations

1. The Relevance of the Society of Jesus

The sole objective of this chapter is to demonstrate the relevance of the Society of Jesus⁶ to Organisational Studies. This chapter is divided into two parts. The first part presents the history of the foundation of the Society, and briefly describes how its founder, Saint Ignatius of Loyola, decided to set up a social entity to which he insistently called a “body” of companions; the second part presents the governance mechanisms of the Society, and demonstrates how they can underpin unexplored research questions that might shed light on Organisational Studies.

5.1 The Foundation of the Society of Jesus

The Society was founded by Saint Ignatius of Loyola⁷ on the 27th of September 1540. The original name of Ignatius was Íñigo, which he changed because it was not as universal as Ignatius. During his childhood, Ignatius was educated by a member of the Spanish court, and after the death of his protector he moved to the court of the Vice-King of Navarra. While at Navarra, Ignatius started a career as a soldier and, during a battle with France in 1521, he was seriously wounded in the leg and returned to his birthplace, Loyola, for a long convalescence period (Tellechea Idígoras 2006).

During his convalescence, Ignatius read several spiritual books which induced an inner struggle which he solved through the discretion of spirits. He noticed that,

⁶ From now on referred to as “the Society”.

⁷ From now on referred to as “Ignatius”.

while he was thinking of mundane, related issues, he sensed a short period of consolation followed by a strong aridity of feelings. However, when he started thinking of spiritual issues and posing the possibility of imitating the life of the Christian saints or Jesus Christ, he felt a strong and continuous joy and inner peace. This deep feeling of consolation, as opposed to desolation, was the starting point of a change of life for Ignatius, and this aspect embodies the main characteristics of the Spiritual Exercises. In fact, this period of Ignatius' life is the cornerstone of the Society, and is indeed critical to understanding how the transformation that occurred in Ignatius, at the individual level, led to the development of a "body" of companions.

Following his recovery, Ignatius started a journey in 1522 to Jerusalem to pray and imitate the Christian Saints. On his journey, Ignatius stopped at Aránzazu (today's Basque country) and Monserrat (today's Catalonia). Upon arriving in Barcelona, from where he planned to sail to Rome, Ignatius decided to stay for a few days at Manresa just to make some more notes for a book (the Spiritual Exercises⁸) he was writing. However, he stayed in Manresa for eleven months between 1522 and 1523. When asked about various issues concerning the Society, Ignatius said that it was during this stay at Manresa that he decided to work for the salvation of souls, and to gather people who might wish to join him.

In February 1523 Ignatius left Manresa and travelled to Barcelona, where he proceeded to Rome to obtain a travel warrant to Jerusalem. In April 1523 Ignatius

⁸ From now on referred to as "the Exercises".

arrived in Venice, from where he travelled to Jerusalem, returning to Venice in January 1524. After returning from his pilgrimage to Jerusalem, Ignatius, at the age of 33, started studying. His academic career began in Barcelona, where he studied Latin and grammar. Two years later, in 1526, Ignatius began studying Philosophy at Alcalá. He subsequently experienced some problems with the Inquisition due to the distinction, made in the Exercises, between mortal and venial sin, whereupon he decided to go to Paris to study Humanities. Ignatius arrived in Paris in February 1528, later obtaining a Master's degree in Humanities in 1535. Although Ignatius never obtained a degree in Theology, he was nevertheless ordained as a Priest while in Paris.

During his stay in Paris, Ignatius gathered nine friends who were to follow him on his endeavour. They all had the purpose of serving only God, leaving behind all matters of the world. This plan was made explicit through a public vow at the church of Montmartre on the 15th of August 1534. In this vow the ten companions promised to live in poverty and to make a pilgrimage to Jerusalem. Should they be unable to reach Jerusalem, they promised to offer themselves to the Pope. This marks the first time that the special character of the Society as being at the Papacy's disposal appears.

After a trip to Spain to attend to personal issues, Ignatius spent the entire year of 1536 in Venice studying Theology and directing the Exercises for lay people. The other members of his group joined him in Venice on the 8th of January 1537. After their arrival, they went to Rome (without Ignatius) to obtain permission to go to

Jerusalem and to be ordained Priests. Due to the presence of Turkish ships in the Mediterranean, no ship would depart from Venice to Jerusalem. Therefore, after waiting almost an entire year, the ten members of the group went to Rome to offer their services to the Pope. On his way to Rome, Ignatius reported a mystical experience at La Storta (a village on the outskirts of Rome). From this mystical experience, Ignatius sought to serve Jesus Christ. This experience had very important consequences for the foundation of the Society, since it established a mission for the ten members of the group and for everyone that intended to follow them: to be a companion of Jesus Christ in the service of God and all men.

During the year of 1538 the ten members of the group dedicated themselves to several apostolic activities, since Ignatius was especially dedicated to the direction of the Exercises. While engaged in these activities, Ignatius also had to deal with several accusations from the Inquisition, charged with raising doubts about the canonical conformity of the Exercises. In order to defend his honour, Ignatius requested a public trial.

Given the possibility that the members of the group might have to disband, they all decided to gather together and plan for the future. Between March and June 1539, all ten members convened, having decided to create a formal group with someone to whom they were supposed to make a vow of obedience. This decision was formally taken on the 15th of April 1539. Between April and June 1539, Ignatius wrote the *Formula of the Institute*, where the fundamental rules of the future Religious Order were made clear. On the 3rd of September 1539 the *Formula of the Institute* was

orally approved by Pope Paul III. The formal approval occurred on the 27th of September 1540 with a special limitation: the Society should have a maximum of only sixty members.

5.2 The Formalisation of the Society of Jesus

The *Formula of the Institute* constitutes the first legal step to formalise any Religious Order of the Roman Catholic Church⁹, since it only establishes what the specific objectives are that the former will pursue. Therefore, any Religious Order must write a set of Rules or a Constitution that determines how its objectives are to be institutionalised.

The first draft of the Constitutions of the Society was written during 1541. After the approval of this draft by six members of the Society (those present in Rome at the time), Ignatius was unanimously elected as the first Superior General¹⁰ of the Society (this was possible because he had said that he would vote for the name that gathered more votes). Ignatius asked for a second election to confirm the first one, but the result was the same. After the second vote, Ignatius asked for his confessor's opinion; he approved the nomination, and finally Ignatius accepted the result of the election on the 19th of April 1541. On the 22nd of April 1541, the six members present at Rome took vows to become Professed¹¹ members of the Society at the basilica of Saint Paul. Until his death, Ignatius lived in Rome; besides some apostolic activities, his main activity was the setting up of the governance mechanisms of the

⁹ The significance of this formalisation will be explained later.

¹⁰ The meaning of the Superior General will be explained later.

¹¹ The meaning of Professed will be explained later.

Society, as described in the final version of the Constitutions, which was only approved after his death in 1556.

Between 1547 and 1552 the core of the Constitutions was written. In 1550 Ignatius asked all the Professed members to go to Rome so that the first draft of the Constitutions could be analysed by the entire Society. In 1552 Ignatius had another draft of the Constitutions ready. However, he insisted that the final draft should be approved only after his death by the First General Congregation¹², which took place in 1558. Besides the final text of the Constitutions, the First Congregation further approved a summary of the Constitutions to be made available to all the members of the Society, and this contained the main points of the original text and rules for the several governing offices.

It should be noted that Ignatius, after presenting the 1551 draft of the Constitutions, took the opportunity to present his resignation as General to all the Professed members present at the meeting. This fact, together with the scrupulous manner in which he accepted the nomination as General, confirms the importance placed by Ignatius on procedures to oppose human nature in its tendency to move towards honorific positions. Therefore, the claim that Ignatius designed most of the governing mechanisms of the Society based on his experience of human nature seems to be confirmed by his own constant attitude (O'Malley 1993). This attitude, characterised by the successive transfer of important decisions to all the Professed members or to his confessor, is coherent with the information gathering mechanisms established in

¹² From now on referred to as "Congregation". The meaning of a Congregation will be explained later.

the Constitutions, supported in the constant surveillance of colleagues that all members of the Society are obliged to undertake.

Besides writing the Constitutions, Ignatius, as a General, assisted the remarkable expansion of the Society's activities into several European countries, Brazil and Asia. During Ignatius's term of office, the Society founded Colleges in Germany, Austria, Belgium, Bohemia, Spain, France, Italy and Portugal. In Brazil the Society founded three Colleges, and in India five Colleges. By the time of Ignatius's death, the Society was also present in Japan, Ormuz, Malacca and the Molucca Islands.

The Society was organised during this period around twelve Provinces created in different years (Padberg, O'Keefe et al. 1994): Portugal (1546), Spain (1547), India (1551), Italy (1551), Sicily (1553), Brazil (1553), France (1555), Superior Germany (1556), Inferior Germany (1556) and Ethiopia (1556). In 1554 the Province of Spain was divided into three Provinces: Aragon, Andalusia and Castile. When Ignatius died on the 31st of July 1556, the Society had more than 1,000 members.

According to the *Formula of the Institute*, the main objective of the Society was the defence and propagation of faith. Given the rise of Protestantism, Ignatius paid special attention to the missions in Protestant countries, sending several Jesuits¹³ there. The Society dedicated itself to the predication of the Gospel, to Sermons, to colloquiums with the Protestants and to the direction of Exercises. Around these activities, Ignatius began the practice of writing instructions to the Jesuits. These

¹³ As the members of the Society are commonly known.

instructions emphasised the importance of trust in God and in all supernatural means, such as masses and praying. However, the natural means, rather than written instructions, such as an exemplary life, the positive tone of all the sermons and lectures and the focus on explaining truth rather than polemics as a way of converting people to the Catholic faith, were of utmost importance for the Society's "way of doing things".

The two main activities of any Jesuit should be conversation and the direction of Exercises. To this end, Ignatius sought to guarantee that all Jesuits had a common training and spoke on different subjects according to the Society's position and, of course, the doctrine of the Catholic Church should never be publicly questioned. These two activities were already distinct to the Society as compared with other contemporary Religious Orders. However, Ignatius and the Society introduced several other novelties to religious life of the 16th century. Among these, the most famous are: the dressing of all the Jesuits should be the same as the ordinary men amongst whom they were living, the residences of the Society should not have a choir, the Jesuits should not be obliged to perform any kind of regular penitence and the praying of the Professed should neither be scheduled nor last a determined time. All these innovations, which shocked most contemporary Catholic Church members, had the purpose of freeing the Jesuits, granting them the ability to move anywhere, to be available for any mission that their Superiors required. To sustain this requirement of mobility, the Jesuits should not accept ecclesiastical offices (such as being ordained Bishops) or any other civilian office that might limit them.

Other practices, also innovative, were aimed at guaranteeing a solid training: the noviciate had a duration of two years, as opposed to the one year characteristic of all other religious Orders; after the noviciate, the simple vows of chastity, poverty and obedience should be taken. The Society had different levels of membership, such as the spiritual and temporal coadjutors with simple vows and the Professed with solemn vows. Finally, another innovative practice was the exceptionally long training period with a final year of probation before being admitted to the solemn vows and to the category of the Professed.

As is clear by now, the Society was not aligned with other Religious Orders in terms of its “religious life practices”, representing, therefore, a shift. Besides changes in everyday religious practices, the Society also developed a set of mechanisms to govern its activities that were, in several aspects, extremely innovative. The following section will introduce these mechanisms, providing information about the relevance of these mechanisms to extant literature on organisational theory.

5.3 The governance mechanisms of the Society of Jesus

The Society was constituted around three foundational texts: the Exercises, the Constitutions and the *Formula of the Institute*. Whilst the Exercises were intended to constitute individual practice, the Constitutions and the *Formula of the Institute* were written to clarify how the “body” of companions ought to be governed.

The Exercises are essentially a decision-making process (Rahner 1971) that demonstrates the “way of doing things” for all the members of the Society. The Exercises, which took 27 years to write (Bertrand 1974), are mainly concerned with the shaping of individual behaviour, and all the members of the Society are supposed to know their contents exactly (Bangert 1985).

According to Arrupe (1981), the Exercises foster the “way of doing things” in three ways: through charisma; through mental and operational activities and through external behaviour that **must** be an image of the internal behavioural **rule**. The “way of doing things” integrates these three levels, builds the self and therefore connects the individual member to the organisation (Arrupe 1981, p. 132). The “way of doing things”, although tacit in the sense that it cannot be defined, can be detailed for specific circumstances. In the Constitutions (§629)¹⁴ Ignatius declares that the superior must **write** instructions on the “way of doing things” that any Jesuit must be aware of before being sent to a mission. As previously stated, the Exercises aim at individual behaviour, and the hypothesis that they constitute an intellectual technology, capable of assuring self-management through discipline, could be considered (Miller and Rose 1990).

¹⁴ Hereafter, the following notations will be used when citing or referring to the Constitutions, the Complementary Norms of the Constitutions and the General Congregations’ Decrees:

- Constitutions: “§”, followed by the number of the paragraph.
- Complementary Norms of the Constitutions: “CN §”, followed by the number of the paragraph, and the number inside the paragraph using the notation “n.”
- General Congregations’ Decrees: “GC”, followed by the number of the General Congregation, the identification of the specific decree using the notation “d.”, and by the number of the paragraph in that decree using the notation “n.”

The Constitutions, which took 24 years to write (Bertrand 1974), aim at the organisational level, and they determine the way the Society should organise itself. This way of organising through a foundational text, as well as the characteristics of the main governing offices, did not change since 1540. The description of these offices, as well as issues regarding the manner of organising the Society, will be briefly presented in the following paragraphs.

The highest office in the Society is the Superior General¹⁵, followed by the Superior Provincial¹⁶, responsible for the government of a Province, and by the Local Superior¹⁷, who governs a local residence or a college where a group of Jesuits live.

The General holds all the executive power in the Society, although he has no legislative power, which resides in the Congregation, which is an assembly of elected members from all the Provinces¹⁸ in the world. To support the coordination of the activities of the Society all over the world, the General has a group of Assistants: “*ad monitors*”¹⁹. There are two kinds of Assistants: *ad providentiam* (elected by the Congregation) and those designated by the General. The Assistants *ad providentiam* have among their functions to guarantee that the General behaves according to what is prescribed in the Constitutions.

¹⁵ From now on referred to as “General”.

¹⁶ From now on referred to as “Provincial”.

¹⁷ From now on referred to as “Superior”.

¹⁸ All the Provinces are represented by at least one Jesuit in a General Congregation.

¹⁹ According to the Constitutions, the Superior General should have around twelve *ad monitors* (§380, updated version). From now on referred to as “Assistants”, unless otherwise stated.

The functions of the General comprise: declaring rules of conduct, interpreting former rules of conduct declared by previous Generals, adapting them to local conditions, admitting and dismissing any member of the organisation and the founding and suppression of some of the Society's activities.

The Provincial is responsible for a Province, and his functions encompass: managing all administrative issues, regularly informing the General about everything that occurs in his Province and aligning the activities of the Province with the overall mission of the Society. A Province typically coincides with a country or a geographical region within a country.

The Superior is responsible for a House²⁰, and his functions consist of: managing all administrative issues related to the House, regularly informing the Provincial about everything and ensuring the accomplishment of the mission. The Superior does not have the power to determine the mission of a member of the organisation that lives in that House – that power resides with the Provincial.

This brief analysis of the Society, and its resilience as regards the number of governing offices, points to the conclusion that there have been four hierarchical levels of this organisation since 1540, leading to the possibility that the Society might have managed the same formal structure since its foundation. The challenges

²⁰ A residence is where the members of the organisation live.

posed by this hypothesis in the context of extant literature on organisational theory will be analysed in the final section of this chapter.

On top of the management levels outlined previously there is the General Congregation. As stated before, the Congregation is the locus of the legislative power and has the following functions: to elect a new General, to interpret the founding texts of the Society, to interpret the texts of previous Congregations and to discuss matters that are understood to be longstanding. The founding texts of the Society that can be interpreted by a Congregation are the Constitutions, the *Formula of the Institute* and the official norms and documents produced by previous Congregations. A significant majority of the Congregations, however, did produce neither relevant legislation, nor changes in the interpretation of the founding mission. It is particularly noteworthy that, out of a total of thirty-five Congregations held since 1540, twenty -even had the purpose of electing a new General²¹. Out of the remaining eight Congregations with alternative functions, five occurred in the 20th century, which suggests a hypothesis that something occurred either within the Society or in its external environment to justify such a need.

The Congregations have two functions related to the interpretation of organisational texts, and one related to the choice of future activity options. As stated in the Constitutions (§746), the interpretation that the Society makes of its own original texts and future activity options must always take into account local adaptation (according to space and time). In this sense, the Society seems to possess a

²¹ The General is elected for a life term.

The Organising Principles of the Society of Jesus remarkably unique way of coordinating activities, identifying and implementing overall plans of action through the interpretation of organisational texts. Given the importance of organisational texts, three distinct episodes where the foundational texts and their interpretation were crucial to the Society can be identified:

The foundation period, between 1540 and 1556 when Saint Ignatius of Loyola died.

The Restoration period, immediately after 1814 until the election of General Ledóchowski in 1915.

The five extraordinary Congregations that occurred in the 20th century.

Having been suppressed in 1773 by the Catholic Church and restored in 1814, the rules that would govern the Society and determine its structure were set in accordance with those established in its foundation. It is particularly interesting that, on the 27th of December 1834, General Jan Roothaan wrote a letter to all the Society's members in which he declared that the Exercises are the most important organizational text, and ascribes the Society's longevity to its practice of the Exercises. General Arrupe, who governed the Society between 1965 and 1983, stated that the "way of doing things" had remained unchanged since its foundation, having been recovered after 1814 (Arrupe 1981, p. 175), and that "*the Society is nothing more than the institutionalized version of the Exercises*"²² (Arrupe 1981, p. 307).

²² Translated from the Portuguese by the author.

The importance given to the foundational texts throughout the association of the Spiritual Exercises at the individual level and of the Constitutions at the organisational level underpins the literature review later in this study, as well as the research methodology adopted. The preserved link between these two texts and the Society's longevity is of utmost interest for organisational researchers along the following line of reasoning.

The Society was founded in the pre-modern organisational world, and has always seen itself not as an organisation but as a "*Corpus*"²³ or entity. Therefore, the use of the term organisation might be anachronistic when studying the Society before 1814, since we can identify the beginning of modern management around this period (Hoskin and Macve 1988).

Furthermore, the structure is resilient and replicable, as evidenced by the pattern of Provinces, houses and hierarchies within them, always leading to the General. There seems to exist a textual way of coordinating activities, identifying and implementing overall plans of action, though the latter are implemented via the General, through the Provinces and Houses, and always in full accordance with the interpretation made at the Congregation's level.

After 1814 there exists a replication of the traditional plans of action based on textual approaches, as before. However, given that the Society is restored in the modern

²³ In the tenth part of the Constitutions Saint Ignatius of Loyola states how the Society can grow and survive, always using the term "*Corpus*".

business world, the “*Corpus*”, as an entity, might have experienced influences from the practices of modern management discourse.

This line of enquiry, concerned with the issue of stability and change in the Society and how it engages in a form of conducting strategy within the textual “way of doing things”, can be translated into the following research questions (RQ):

RQ1: Which dimensions could explain the sustainable conduct of the same formal structure over the years?

RQ2: How did the entity became an organisation?

RQ3: How does the entity adopt organisational categories and practices?

The answers to these RQ’s might shed light on issues of modern organisational theory and strategy through researching an entity that has persisted from before modernity, and is now within it. In this sense, “governmentality”, as a modern concept associated with a full set of categories and regulating the lives of individuals through disciplinary techniques (Foucault 1979), should be addressed, since the objectives that underpin any governance mechanism are accompanied by technologies of self-management that, in the case of the Society, allow coordination through “action at distance” (Latour, cited in Miller and Rose 1990).

5.4 Conclusion

It is clear by now that Ignatius introduced three general novelties when devising how the Society should organise itself. The first novelty Ignatius introduced was the notion of the Exercises as a “technology” to underpin individual decisions; the second novelty encompasses all the practices characteristic of previous Religious Orders that Ignatius firmly rejected (for example the elimination of the choir, regular penances and so forth); the third novelty associated with the Society lies in the governance mechanisms Ignatius conceived. These three types of novelty provoked, throughout the centuries, a significant body of hostile literature and, even during Ignatius’ life, persistent resistance from the Roman Catholic Church’s hierarchy, with the Inquisition’s constant persecution of Ignatius as its most visible form. The remainder of the present thesis will attempt to uncover how the three categories of novelty introduced by Ignatius were used to achieve control over a geographically dispersed “body”, and how they may shed light on the relationship between the individual and organisational levels of analysis.

The above RQ’s, together with the way the Society organises itself, frame the remainder of this thesis. First, in the following chapter, a brief discussion of how has the research been undertaken, and the philosophical underpinnings that sustain it, will be conducted. Then, in the second part of the thesis, an analysis of pastoral power will set the ground in a historical context for the following presentation and discussion of the Society’s governance mechanisms and organising principles.

Historical Methodological approach

The apparent structural resilience of different religious organisations, and the already assessed structural resilience of the Society, call for a deeper understanding of the way they are organised. Since the Society not only reveals structural resilience, but also longevity, and aligned with calls from previous research on organisational structure (DiMaggio 1998, among others), a historical methodology has been considered as the most suitable for the current research, following, in this assertion, previous studies which point to the need for historical and longitudinal methodologies for the understanding of religious organisations (Miller 2002). The present chapter will discuss a particular “historical methodology”, providing grounds for the classification of extant literature on organisational structure as modern, and therefore not fitted for the Society insofar as it is anachronistic. The first part of this chapter will provide the philosophical grounding of the historical methodology adopted, and the second part will discuss history as a methodology for organisational studies.

6.1 Philosophical Grounding

Organisational studies could be divided, broadly, into three main frameworks: scientific management and human relations (Perrow 1973), and that which emerged after the “linguistic turn”, although this could be held in contempt. In the scientific

management framework, the driving forces of investigation are efficacy and efficiency, aiming at finding the models that best describe organisations, providing, henceforth, researchers and practitioners with the tools necessary to intervene in any organisation. This framework draws its conclusions upon two general assumptions: the first assumes that organisations exist independently of the researcher; the second asserts that this reality can be known. These two assumptions are coherent with particular ontological and epistemological stances that sustain theoretical generalisation, seen as the possibility of explaining various similar phenomena, therefore building a predicting capability (McIntyre 1994). This framework has developed within what is known as contingency theory, developed mainly by the Aston Group (Pugh, Hickson et al. 1968; Pugh, Hickson et al. 1969) and subsequent researchers. The main objectives of the Aston Group studies were the identification of organisational elements that influenced an organisation's structure. This means that causal relations could be found and tested (Johnson and Duberley 2000, p. 42).

The human relations framework, as defined by Perrow (1973), focuses its attention on the "whole person" and on "interpersonal dynamics" (Perrow 1973, p. 3), moving from the mechanical metaphor to the organic one (Burns and Stalker 2001) when assessing organisations. This framework assumes the existence of organisations (ontological stance) but the importance accorded to people as an organisational element (Leavitt 1965) and the belief that external entities only exist as long as subjects are aware of it, fosters the emergence of an interpretive approach to organisations (epistemological stance), drawing upon various classical studies such

The Organising Principles of the Society of Jesus as those by McGregor (1969), Katz and Kahn (1966) and March and Simon (1958)²⁴. Organisations will start being analysed not only as objectified external entities, but also as open systems (Scott 1992) in close relation to particular organisational environments. According to this framework of analysis, the notion that organisations are negotiated, organised and constructed by its members, following Berger and Luckmann's analysis of social structures (Berger and Luckmann 1966), arose as a corollary and underpinned several different approaches, like new institutionalism (Meyer and Rowan 1977; Scott 1987; Powell, DiMaggio et al. 1991).

The framework that emerged after the “linguistic turn” focuses on the understanding of how structures are enacted. In this sense, structure can be addressed from an interpretive approach, and the constructivist approach starts to identify elements of discourse that enact agency (Heracleous and Hendry 2000), leading to a “structural view of discourse” (Heracleous and Hendry 2000), as well as to an “organisational action view of strategic management” (Heracleous 2003). From this perspective, the relationship between strategy and structure is addressed from the agent's perspective and interpretive schemas (Heracleous and Hendry 2000), which represents a substantial move from previous approaches that assumed the relation between strategy and structure was taken for granted. According to this framework, change is due to discourse change (Hardy, Palmer et al. 2000), but the elements of the discourse are not identified as structural dimensions. However, after the linguistic turn, a full body of literature has addressed organisational texts as sources of possible comprehension of either organisational structure (Rhodes and Brown 2005) or

²⁴ These are classical examples, not intended to represent the full range of literature.

The Organising Principles of the Society of Jesus strategy (Dunford and Jones 2000; Jarzabkowski and Sillince 2007), adopting discursive approaches to organisations (Putman and Fairhurst 2001).

The previous assertions could easily be held in contempt. The literature on Organisational Studies' cannot be reduced to a mere three perspectives, as many more different approaches, using different methodologies and ontological assumptions, have emerged. It is this thesis' assertion that most of the literature on Organisational Studies is somehow trapped inside its own modern discourse, failing to acknowledge the extent to which some of our own assumptions have developed and emerged historically. Following this line of reasoning, assuming modern managerial categories to be contained in a specific period of time, might lead to a failure to comprehend how, possibly, some of the main managerial problems faced by modern organisations already contained in pre-modern forms of organising, leading the latter to have developed solutions that are, in their essence, similar to those envisioned by modern managerial scholars and practitioners. The following paragraphs attempt to demonstrate how an examination of historical contingencies, as a methodological approach, is the most suitable way of analysing how and why religious forms of organising devised particular sets of practices and mechanisms.

6.2 The Modern Character of Extant Literature on Organisational Studies

The frameworks referred to above are more than ontological and epistemological stances. In philosophical terms, these frameworks draw on the assumed relation between the subject and the object. This relation, which characterises modern philosophical thought, assumes the subject, and his consciousness, as constituents of the relation between Man and the external world, provide meaning. Therefore, these frameworks' analysis can be classified as modern. However, the so-called structural and post-structural²⁵ approaches to organisational studies are driven by questioning the existence of organisations as external entities (since the primacy of the organisation as an entity, and as a level of analysis, is questioned as much as the individual or the social as such), and by abandoning the mainstream philosophical stance that takes the subject as the centre of any ontological and epistemological positioning. The subject – object relation is not driven by the subject's conscious, but by the structures that underlie the being – in – the – world of the subject. This means that meaning is not in the object, and in its relation with the subject's knowledge categories, meaning is enacted by the structures that condition the subject. These enacting structures assume many forms – culture, religion, social structures and

²⁵ Post – modern approaches will not be considered since they take the failure of Enlightenment and its project of rational progress as the main reason to abandon modernism. It is not, therefore, a shift in the relation between the subject and the world. Some controversies, such as those presented in recent works will therefore be overlooked for the time being. For references please check: Ansoff, H. I. (1987). "The Emerging Paradigm of Strategic behaviour." Strategic Management Journal 8(6): 501-515., Hassard, J. (1999). "Postmodernism, Philosophy and Management: Concepts and Controversies." International Journal of Management Reviews 1(2): 171-196., Pfeffer, J. (1993). "Barriers to the Advance of Organization Science: Paradigm Development as a Dependent Variable." Academy of Management Review 18(4): 599-620., Wicks, A. C. and R. E. Freeman (1998). "Organization Studies and the New Pragmatism: Positivism, Anti-positivism, and the Search for Ethics." Organization Science 9(2): 123-141., Willmott, H. (1993). "Breaking the Paradigm Mentality." Organization Studies 14(4): 681-719.

language. The latter assumes particular interest in OS since texts (of any kind) are an important element of organisations.

However, this does not mean that the subject no longer produces meaning, but that there are meanings that are enacted by underlying structures that condition the subject. Therefore, the assumption that the former dualism (subject – object) is substituted by a new one (subject – structure) is not altogether correct. Assuming a new dualism would mean the elimination of the possibility of an autonomous subject. Furthermore, the underlying structures are conditions for the possibility of any kind of autonomy (Wahl 1973; Frank 1989), which is crucial for a clear understanding of Foucault's later work.

Autonomy arises, therefore, as a crucial notion, whose clarification can only be achieved after understanding the concepts of anomie and heteronomy, and relating them to resistance. Anomie is the state prior to any form of organisation, being characterised by the absence of clearly defined norms within a group of individuals. Heteronomy is a state in which norms characterise the structure. Those norms are imposed upon the subject from the structure, *id est*, from the exterior. In this structural state, the norms serve as a control mechanism of the Self. In heteronomy there still exists a duality subject – group. Autonomy occurs when the norms that sustain the group are assumed by the Self, interiorized. In this state the duality of subject – group no longer exists. The order of discourse, being prior to any subject–group duality, distinguishes autonomy from the other two states. If transposed to organisational studies, this would mean that the organisation could be defined as the

common underlying structure that regulates individual and group behaviour. It is in this sense that in organisations the members might not differ from the organisational structure, because both are regulated by a common structure. That is why the structure could neither limit nor oppose the Self, but foster individual freedom. Anomie, heteronomy and autonomy may be seen, therefore, as states in structural development. Although anomie does not characterise an organisation, insofar as the absence of norms does not allow the coordination of the individuals, it does appear as the first stage of structural development.

The acceptance of common norms for the coordination of a group put the entity in a pre-organisational state, heteronomy. Heteronomy induces disciplinary mechanisms that, once assimilated by the individual, will lead to autonomy. In case the individual violates the structural norms (due to autonomous behaviour), heteronomy will function as a disciplinary mechanism to sustain the established structure. (Wahl 1973; Frank 1989), which is instrumental for achieving specified goals.

Underlying the instrumentality associated with organisations is a determined way of understanding power, especially of how to exert it, which is one of the most relevant characteristics of Foucault's work. Foucault refuses to accept a general theory that might explain the domination mechanisms and the relevance given to the subject, *id est*, to the mechanisms that transform "human beings into subjects" (Foucault 1982, p. 777). Power, in Foucault's work, is therefore always present, insofar as power relations are always present in "signification relations" (Foucault 1982, p. 778). This

focus on the study of power as related to the mechanisms of production of subjects is distinctive of Foucault's research.

Foucault distinguished two modes of power: the "juridico-discursive" and the strategic mode of power (Foucault 1981). The "juridico-discursive" representation of power is relational in nature, and points to an asymmetrical mode of relationship between an entity (as the State or the Prince) and an autonomous individual. The strategical mode of power is related to the pattern of power relations that constitute a particular social arrangement. Three conclusions can be drawn from the definition of these two modes of power (Foucault 1981).

The first conclusion is that power is nothing more than a name one attributes to a particular type of social arrangement. This nominalist conception of power means that, in its nature, power is not something one has, nor is it a particular type of institution or an overarching structure. The second conclusion, which emerges from the nominalist stance, is that in order to assess the particular type of social arrangement in which a power relation is present, one should analyse power as a representation and not in terms of its nature (Foucault 1981). Therefore, as a third conclusion, power should not be analysed only as a legitimation mechanism, but mainly in terms of its productive dimension. Power is productive because it facilitates new practices and new fields of knowledge, which induce new mechanisms that entail power relations. This is the basis for Foucault's micro-analysis of practices and disciplining mechanisms of particular institutions, such as the clinic and the prison (Foucault 1991; Foucault 2001). This type of analytics of

power, detached from the traditional analysis based on the assessment of mechanisms of legitimation and consensus, focuses, instead, on modes of subjection and on a critical stance oriented to struggle and confrontation. However, this analytics of power did not fully address the modes of constitution of the Self and of its subjection, and thereby limited the capacity for a critically resistant attitude. In this sense, Foucault differs significantly from a structurally discursive approach. As outlined previously, although Foucault recognises the relevance of the discursive structural relation between a subject and an object or a group, for him the structure cannot eliminate the possibility for the subject's freedom action, which is the basis of a critical stance. Foucault's work must therefore be approached enlightened by the need to constantly assess what is behind the antinomic relation between totalitarian mechanisms and the autonomous individual (Foucault 1982). It is aligned with this philosophical stance that Foucault presented throughout his life, the two main mechanisms of resistance: "tactical reversal" and an "aesthetics of existence" (Foucault 1981).

The first mechanism of resistance, "tactical reversal", is associated with the "juridico-discursive" and the strategical modes of power, meaning that the conflicts inherent to power relations, which entail resistance, can lead to the reversal of those power relations by knowledge of how the patterns of power have been constituted, thereby thwarting such relations. The second mechanism of resistance points to a possibility of resistance directly related to an autonomous individual: only autonomy can resist power relations. Since autonomy can only come from heteronomy, as outlined previously in this chapter, a new analytics of power, based on the analysis of

heteronymous practices, was devised by Foucault in his later work. This is the third mode of analytics of power and, according to Foucault (1981), it is best to foster a critical attitude.

In his later work, namely in the lectures of 1977 - 1978, Foucault (2009) identifies a shift in the way power is exercised: sovereignty, exercised by a Prince, is substituted by governmentality, which is exercised by the State. Although the political character of the work of Foucault is beyond the scope of this study, it is important to fully understand that in the above mentioned shift an important consequence is present: if the sovereign Prince used to administer his authority over the territory and over life and death, the governmental State exercises authority over a population (Foucault 2009). It is the emergence of the notion of population that leads Foucault to investigate how specific identities can emerge from a population. More importantly, Foucault's later work is focused on an attempt to shed light on the way particular identities can be governed and conducted immersed in the population. Therefore, at this point, it should be clear that in fact all of Foucault's work is related to the subject and to the antinomic relation between a totalitarian stance and the autonomous individual. However, rather than trying to uncover the dimensions of this antinomic relation using the traditional analytics of power relations, Foucault concentrates on how the individual subject is shaped so that he behaves in a way that is in accordance with what the sovereign instance desires. The sovereign instance, which can be related to the totalitarian stance in the power relation, starts to be preoccupied, after the 18th century, with the specification of governable typologies of identities (Foucault 2009).

This does not mean, however, that Foucault rejected other modes of analysis of power. In fact, it is the assertion that power relations are strategically deployed in distinct forms with a historically-contingent rationality that led to the adoption of historical methods to uncover such relations. The analysis of the deployed rationality is what allows the understanding of how a particular set of procedures has been put up as means to achieve historically-contingent aims. Resistance, in this sense, can occur through historical shifts that call attention to the limits of the apparatuses of practices deployed, and for the rationality underpinning the dominant “episteme”. Nevertheless, this approach to power relations entails one theoretical limitation: resistance is inherent to power relations, but can only be approached through the same force relations that give shape to what it intends to resist against. In this sense, resistance seems to be always reactive to existing or rising force relations, which limits the possibilities inherent to a critical stance. As will be clearer subsequently in this chapter, this theoretical limitation is directly related to the limitations inherent to the archaeological approach envisaged by Foucault.

Before proceeding with the adoption of what could be a research methodology coherent with the research questions put forward before, it is crucial to clarify Foucault’s philosophical stance vis-a-vis his critical attitude. The question regarding Foucault’s philosophical stance and historical methodology is not new: Was Foucault a philosopher or a historian? In this sense, and given the relevance of this question, it is important to locate Foucault’s thought in both a philosophical and a historiographical tradition.

Foucault's account on modern philosophy in his central article, "What is Enlightenment?" (Foucault 1984) sheds light on his philosophical stance. Foucault's critical stance diverts from Kant's critical attitude insofar as Foucault is not seeking the transcendental limits of human reason. Foucault does accept the modern critical attitude that frees human beings as subjects from different forms of limitation, which results from the controls imposed by religion, politics and even intellectuality, but he is not seeking a transcendental *a priori*.

History, and Foucault's archaeology and genealogy as historical methodologies, come to play a crucial role in his thought because Foucault's critical attitude will replace the search for the transcendental limits of reason with a methodology that aims at showing that most, if not all, of our necessity assertions are historically contingent. Following this, archaeology treats "the instances of discourse that articulate what we think, say, and do", whilst genealogy "uncovers the possibility of no longer being, doing or thinking what we are, do, or think" (Foucault 1997, p. 315 - 316).

Critique, in Foucault's thought, is therefore different from the modern Kantian critique and not only related to the capability to resist different deployments. In fact, as outlined previously, this type of critical attitude derived from a determined view of power as either "juridico-discursive" in nature, or strategical in its deployment. The new conception of power, as envisaged by "governmentality", leads to a conception of critique based on the capability of every human agent to be free and to exercise his

own freedom. In that sense, traditional views of critique were not significant as analytical tools, insofar as they failed to explain historical and societal shifts. Foucault's critical attitude, insofar as his later work is concerned, is centred on the constitution of types of subjectivity which induce new forms of agency: "the point of critique, rather, is to forge new forms of life, new non-fascistic modes of existence. The work of critique is, in short, self-formation" (Thompson 2003, p. 123).

The "juridico-discursive" and the strategical modes of power pointed, therefore, to a particular form of critique, and to two particular historical methodologies: archaeology and genealogy.

Archaeology follows the assumption that language constrains thought. However, as discussed previously, archaeology is not based on a structuralist stance. What archaeology tries to uncover is the set of rules that frame thought, making some things unthinkable. History, in this archaeological sense, delineates the conceptual environment that constrains human agency and thought. Archaeology distinguishes itself from hermeneutics because it does not interpret texts, but only delimits the "episteme". This epistemic archaeological object is, again, quite distinct from Kant's "a priori" because it is not transcendental; Foucault's archaeology is only focused in practices, such as, for instance, how prisoners or insane people are treated. It is based on the assumption that, through practices, the historian of thought can access the "episteme" that Foucault delineates the dimensions of archaeological analysis (Foucault 2002), like the object of analysis, the concepts that frame the latter, the different modes of authority and the lines of strategic action.

Archaeology, as a methodology, is the process of uncovering the underlying systems of thought that constrain the individual – not in the sense that the individual loses liberty, but in the sense that the individual is unable to think of possibilities that are outside of the system of thought. Therefore, archaeology assumes language to be the source of thought, but it does not confine the Self to a linguistic structure, which would be typical of a structuralist approach. The rules that constrain thought are not the rules of the language structure, but the rules of the system of thought. The uncovering of these rules facilitates the understanding of the system of thought underlying them, and sense is brought to the surface. The rules of any system of thought are crucial to gaining an insight into the structure that underpins a determined context. Therefore, individuals do not lack autonomy; rather, their autonomy is embodied in a conceptual framework that limits and determines their thinking / acting. The autonomy of the individual is related to its unawareness of the system of thought that governs him.

However, archaeology will not permit the researcher to access the underlying structure of thought. What the researcher is able to assess are the superficial effects of that structure through linguistic analysis. It is because of this limitation that a proper category of language analysis must be chosen, since for Foucault it is not the formal structure of language (syntax and semantics) that allows the uncovering of the system of thought. The archaeological historical approach is not, however, hermeneutical. Therefore, meaning is not the ultimate goal of this kind of research; texts will not be treated as documents but as superficial clues that make sense only in

a particular context. This means that the archaeological historical methodology is interpretative because it tries to make sense of a set of contextual data – it neither attempts to empirically generalise, nor to interpret linguistic structures.

Archaeology applies these analytical dimensions to practices, and that is what makes genealogy meaningful. Genealogy is, in Foucault's research, a description of the changes in a determined practice. Foucault's only truly genealogical work is *Discipline and Punish* (Foucault 1991) and genealogy's innovative character derives from its attempt to link eventual changes in thought to changes in practices, thereby attempting to make a history of the present, *id est*, tracing the origins of present practices and institutions. It is through the established relationship between thought and practices that the relationship between knowledge and power arises. If it is practices that truly changes thought through the assemblage of social forces, then one can define a relationship between power and knowledge, because it is through power that discursive deployments or "epistemes" are changed. Power's productive role is closely associated with the fact that power can change an "episteme", delimiting what we know.

Given the importance of a diachronic approach, genealogy appears as a complementary historical approach. On the one hand, the archaeological approach uncovers the systems of thought; on the other, the genealogical approach attempts to explain the changes that cause the move from one system to another. It is in this context of a possible change from one system to another that power arises, making the transformation of an "episteme" possible. The process of transforming a system

relates power to knowledge in the sense that knowledge is constrained, eliminated or produced by power, and vice-versa. Foucault identifies two levels of knowledge: conscious knowledge, which is easily articulated by an individual, and an Archaeological structure of knowledge, which is to be uncovered. The relationship between power, knowledge and educational systems (of any kind – schools, socialisation processes, etc.) is the foundation of the disciplinary character of Foucault's philosophy.

The attempt to uncover the limits of our knowledge follows Kant's approach to a certain extent. However, Foucault's critical approach aims at assessing the historical contingencies that determine the systems of thought. This means that, for Kant, the critical approach was to some extent an attempt to uncover the chains of necessity that underpin the relation between the subject and the external world (a dual approach); whereas for Foucault, the chains of necessity need only to be uncovered so that they are exposed as mere historical contingencies. Hence, and in the context of the present research, the acknowledgement that the pre-modern system of thought is different from the modern one is of the utmost importance.

The biggest distinctive feature of the modern system of thought is its disciplinary character. This does not mean that there was no discipline in the pre-modern world, but that modern discipline has distinctive categories:

- 1.Hierarchical observation: individuals can be controlled and observed (the Panopticon metaphor).

2. Normative judgment: another form of control that defines what is normal behaviour, judging the individual in comparison with the other members of the social group.
3. Examination: this category combines the previous two, and is also a form of control since it sets, in a written form, the rules that govern the system of thought through the clarification of what constitutes a normal behaviour.

The previous disciplinary categories constrain the individual and are the material expression of what can be deemed as a problem. The type of problems that an individual puts forth is defined by the system of thought and controlled by the other members of the social group. However, these disciplinary mechanisms are associated with the “juridico-discursive” and strategic forms of power. Foucault, in his later work, identified a third form of power, Pastoral power, capable of explaining the emergence of a governmental form of power aimed at the “conduct of conduct” (Foucault 2009), which is distinct from any other form of power known. Pastoral power characterises pre-modern forms of organising religion and emerges into modernity as a governmental form of power (Foucault 2009). Therefore, given that the Society emerged before modernity, and that previous research has shown the limits of modern organisational structure classifications to uncover the organising dimensions of the Society (Bento da Silva 2008), an “analytics of governmentality” will be used as the preferred research methodology for an analysis of how Pastoral power can be deployed, using extant literature on this form of methodology as a theoretical framework (Rose 1999; Dean 2010).

6.3 Analytics of Government

Until the 18th century, “government” referred to self-control, guidance of the family, management of the household and the direction of the soul. According to Foucault (2009) after the 18th century government starts to refer to the State. It is around this shift that Foucault’s later work is mainly concerned with how one can relate “subjectivation” (Foucault 1982) with the emergence of the modern political State using a single analytical perspective. Foucault draws on the hypothesis that the modern State is a combination of political power with pastoral power. Whilst political power has its roots in Greek political thought, pastoral power derives from the way Christianity, during the medieval period, directed individuals’ conduct.

The Catholic Church developed a group of practices that facilitated the analysis of an individual, using individual reflection upon one’s actions and desires and the spiritual director’s supervision as the founding mechanisms of government over individuals. Therefore, Foucault (2009) states that a different type of knowledge is associated with pastoral power: the knowledge of the inner truth. Pastoral power, having spread in the 16th century to other institutions, is related to the government of the modern State insofar as the latter relies on the knowledge it has of each individual and of the population as a whole (Foucault 2009). Although the State does not aim either at the salvation of individual, nor at the guiding of individuals to a better life in the afterworld, it does rely on the need to improve the welfare of the population as a whole. It is the principle of the welfare of the population that allows the creation of several apparatuses of security, underpinned by political economy as the preferred

form of knowledge of the modern State (Dean 2010). Given the fact that the modern State relies on the assumption that individuals are autonomous, an analytics of government cannot be detached from an analytics of power. However, the type of power associated with an analytics of government is beyond an analytics of power, based on the assumption that power is either related to consensus or to domination.

The type of power associated with “governmentality” is related to ethics, in the sense that governmental forms of power aim at conducting the individual, delimiting his fields of action, rather than aiming at the individual’s consent or at the deployment of mechanisms of domination. The governmental form of power is therefore beyond the “juridico - discursive” and the strategic forms (Foucault 1997, Vol 3, p. 341):

“The relationship proper to power would therefore be sought not on the side of violence or of struggle, nor on that of voluntary contracts (all of which can, at best, only be the instruments of power), but rather in the area of that singular mode of action, neither warlike nor juridical, which is government.”

Following these assumptions regarding the nature of governmental power, an analytics of government should entail an analytics of truth (Thompson 2003) which is underpinned by rational forms of knowledge, which, together with techniques for the direction and the regulation of behaviour, allow the deployment of practices of government that will be capable of delimiting the way individuals govern their conduct.

An analytics of government should therefore try to assess what is the specific reasoning behind the deployment of a group of practices that foster the shaping of individual behaviour. “Governmentality” and its analytics go far beyond the search for mechanisms of hierarchical observation and domination. Mechanisms of observation and domination, while related to another type of power, call for the assessment of practices for disciplining the subjects. However, as far as “governmentality” studies are concerned, an analytics of government is more focused on the assessment of technologies of the self that allow individuals to freely conduct themselves through the application of practices that are aimed at the body, the soul and thought. Technologies of the self, although deployed at the governmental level, are put into action at the individual level: it is the individual who believes that he can modify his behaviour in a way that leads him to what he believes to be a better state of being, a better Self.

An analytics of government should further attempt to relate technologies of government with technologies of the Self (Dean 2010). It is only after the establishment of such a relationship that an analytics of government can go beyond the capabilities of the individual and look for the mechanisms that shape autonomous individual conduct in a heteronymous way (Lemke 2010). The search for the relationship between heteronymous practices and the constitution of the autonomous Self distinguish an analytics of government from other modes of analysis. However, an analytics of government is neither a methodology, nor a framework of explication, nor a theoretical approach: an analytics of government is a style of analysis that relies on a distinctive critical perspective (Lemke 2010). An analytics of government

is therefore an analytical tool whose objective is to critically analyze (in the sense detailed earlier on this chapter, *id est*, that a critical attitude is one that seeks new ways of forging governable Selves) how a type of subjectivity can be constituted that leads to a determined form of agency.

A critical form of analysing government is based, in the context of Foucault's work, on the concept of an aesthetics of existence, whose practices shape the Self according to a desired end-Self. It is the autonomous Self who looks forward to conducting an existence which is meaningful, *id est*, aesthetically relevant. However, as outlined earlier in this chapter, the autonomous Self is shaped through heteronomous practices which call for a rationality. However, given that this rationality is not transcendental in character, it is through history that one can assess the way different sets of heteronomous practices have shaped different autonomous Selves throughout history. This is what lies behind Foucault's research on sexuality (Foucault 1981; Foucault 1990; Foucault 1992).

In his genealogical work, Foucault (1981) ascertains that one major shift occurred with the emergence of monastic life: the technologies of the Self came to be defined in accordance with the search for inner truth. In the Classical and Imperial periods, technologies of the Self were primarily related to self-mastery, harmony and moderation. It was these principles that ruled the relation one had with one's master - philosopher. However, following the emergence of Christianity, the relation with the Pastor, the new master, was defined according to the desire for a life in the afterworld and with the revealing of one's inner truth. The knowledge of one's inner truth is

what permits, in the context of Pastoral power, the rule over the individual's conduct and, *a fortiori*, the emergence in the modern world of practices of administration, control and normalisation (Foucault 1993).

However, the relationship of the master to disciple, in the monastic context, is still asymmetrical: the master has power over the disciple through the vow of obedience. The difference between this asymmetrical form of power relation and other forms of power, also asymmetrical in their nature, is that Pastoral power relies on a relation of truth and not on a relation of either consent or domination. The practices of Pastoral power were deployed underpinned by the need for inner truth, and not by the need for legitimation or domination.

As regards power relations, in governmental practices there is still the need to solve the antinomy between the individual and the power instance (Thompson 2003, p. 130):

“Regimes of governmental practices constitute, for Foucault, specific types of governable subjects; they do so by shaping the individual's conduct from within: the individual acts in accordance with the conceptions of self-identity implicit within these practices.”

Heteronymous practices are the crucible of an autonomous behaviour insofar as the rationalities behind those practices constitute the rationality that shapes individual behaviour. In his *History of Sexuality*, Foucault (1981; 1990; 1992) traces the

emergence of processes of stylisation of the self, which, through the emergence of Christianity and its focus on the knowledge of the individual's inner truth, led to a shift in the practices of examination and confession. These practices would subsequently form the basis of the emergence of modern practices of government, which call for the need to know populations, shape governable typologies and deploy welfare practices for the government of the population (Foucault 2009; Dean 2010).

How could one set up a specific methodology around Foucault's analysis of governmental power? As a starting point, one should clearly define problematisation, which is "the way an individual formulates fundamental issues and choices, by which he confronts his existence" (Dean 2010, p. 21). This definition points to the assumption that human conduct can be shaped rationally, linking it to specific ends and therefore constituting the ethical dimension of "governmentality" studies (Dean 2010). The shaping of the individual's "behaviour according to particular sets of norms and for a variety of ends" (Dean 2010, p. 18) is what makes the governmental form of power ethical in nature, because individual conduct will be perceived by the individual as being the best.

In order to set up a research methodology based on a critical approach to practices of government, one should incorporate two fundamental dimensions:

1. The government of entities, which leads to the assessment of deployed practices of government.

2. The government of the Self, which leads to the assessment of deployed practices of the Self.

“Governmentality” studies should therefore try to establish the link between practices of government of the entity and practices of government of the identity (Dean 2010). Dean (2010) proposes the following as a research methodology:

1. Analytics of practices of the entity:

- a. What are the forms of visibility of government? This dimension looks for, as an example, relations of authority and obedience, connections between different locales and agents, problems to be solved and objectives to be sought.
- b. What are the technical aspects of government? This dimension assesses the mechanisms, procedures, technologies and vocabularies that constitute authority.
- c. What is the expertise and know-how used to govern?
- d. What are the characteristic ways of forming identities?

2. Analytics of practices of the Self:

- a. Ontology: what is the ethical substance of behaviour? E.g., the flesh in Christianity.
- b. Ascetics: how is the ethical substance governed? E.g., spiritual exercises in Christianity.

- c. Deontology: what is the mode of “subjectification”? *Id est*, who are we when we are governed in such a manner? E.g., a prey to the weakness of the flesh in Christianity.
- d. Teleology: Why are we governed? E.g., the otherworldly salvation in Christianity.

In this sense, “governmentality”, as a research methodology, is mainly concerned with regimes of practices and with the ways in which those “emerge, exist and change”; (Dean 2010, p. 30). It is the analysis of the regimes of practices that underpins the analysis of a particular entity, namely how did the entity emerge, exist and change through those regimes of practices? (Dean 2010, p. 33):

“An analytics of government takes as its central concern *how* [italics in the original] we govern and are governed within different regimes, and the conditions under which such regimes emerge, continue to operate, and are transformed.”

The critical assessment of a governmental mode of power can only operate, on the one hand, through the uncovering of the forms of truth that shape individual identity. On the other hand, the practices of government deployed at the entity level should be contrasted with the rationality of government that directs the “conduct of conducts”. A critical engagement with such forms of government will therefore look for the ends of both types of practices, insofar as power relations shifts should be sought for in the ends, and not in the means.

The remainder of this thesis will attempt to ascertain, in the next two chapters, the shifts that might have occurred in the way Pastoral power was deployed by pre-modern Religious Orders, and that might have led to the emergence of a governmental form of power. The first chapter will analyse Pastoral power as related to the practices used by pre-modern Religious Orders looking for the ends behind the practices underpinning Pastoral power; the second chapter will analyse the shifts that occurred in these practices after the emergence of the Society, both at the entity level and at the individual level.

Part 2 – The Pastorate

Pastoral power

The way religious organisations are governed and the assumptions behind the government mechanisms each religious organisation chooses might lead to the conclusion that such organisations have no parallel in the secular world, especially in other types of organisations. However, the way religious organisations are governed might rely, as suggested by Foucault, on a particular form of power known as pastoral power, which will influence the way other type of organisation, such as the State, would be governed from the 16th century onwards (Foucault 2009). Research on the emergence of pastoral power has provided information about the emergence of a rationality of the government of the state (Dean 2010). However, research on the influence of pastoral power in the emergence of the governance mechanisms of other types of organisations does not seem to have been extensively conducted. As a hypothesis, such an investigation might help understand how pastoral power can translate into a particular way of structuring an organisation: if pastoral power fosters the understanding of present rationalities regarding the way the state must be governed, can it also foster an understanding of current ways of structuring an organisation?

The pastorate is a technique of government devised during the early years of Christianity, although its origins can be found in earlier religious and philosophical traditions (Foucault 2009). As a technology of government, the pastorate relies on the notion of 'care' and on the ideal relationship between a shepherd and his flock. According to Dean (2010, p.91), the shepherd-flock relationship is based on the

relevance of the nature of that relationship, namely the duties associated with the shepherd, and these include the activity of gathering and conducting the flock towards salvation through a strong sense of devotion and beneficence. In Christian tradition, Jesus Christ is the Good Shepherd, who is the model of a shepherd, and the Catholic Church does seem to be organised around the pastorate (Dean 2010).

The pastorate as a technology of power is closely associated with the notion of government, understood as the conduct of men (Foucault 2009). This notion of government is the basis for the possibility of conducting other men, and is underpinned by the notion of pastoral power. According to Foucault, the notion of government is linked with the “idea and organisation of a pastoral power” and to the “direction of souls” (Foucault 2009, p. 123).

Pastoral power has three main characteristics (Foucault 2009). The first characteristic of pastoral power is the absence of a territory to be governed. The shepherd exercises his power over individuals, represented by the idea of a flock, who are not confined to a particular territory. The second characteristic of pastoral power is the beneficence associated with the figure of the shepherd. The only function of the shepherd is to assure the salvation of the flock, which is its subsistence. The third characteristic of pastoral power is the individualisation of the members of the flock. The flock is conducted as a group, yet without forgetting each individual. The shepherd is therefore someone who is responsible for the flock, assuming the direction of each and every member of the flock towards salvation, and being

prepared to sacrifice himself for the sake of the flock. These characteristics of pastoral power characterise it as a special kind of power, insofar as it is a power “that guides towards an end and functions as an intermediary towards this end” (Foucault 2009, p. 129). In Foucault’s words, “*The Christian Church coagulated all these themes of pastoral power into precise mechanisms and definite institutions, it organised a pastoral power that was both specific and autonomous, it implanted its apparatuses within the Roman Empire, and at the heart of the Empire it organised a type of power I think was unknown to any other civilisation*” (Foucault 2009, p. 129-130).

Pastoral power was translated by the Catholic Church into institutions such as religious organisations and into particular forms of spiritual direction, both of which seem to still influence particular forms of government today: “*This pastoral power, absolutely bound up with the organisation of a religion as a Church, with the Christian religion as the Christian Church, no doubt underwent considerable transformations during these fifteen centuries of its history. It was no doubt shifted, broken up, transformed and integrated in various forms, but basically it has never been truly abolished*” (Foucault 2009, p. 148). The pastorate as a technology of power was therefore transformed by the Catholic Church into particular ways of governing men, especially through its hierarchy and its religious organisations. However, “*the history of the techniques employed, of the reflections on these pastoral techniques, of their development, application and successive refinements, the history of the different types of analysis and knowledge linked to the exercise of pastoral power, has never really been undertaken*” (Foucault 2009, p. 150).

Research into religious organisations might foster the present knowledge of pastoral power insofar as “*we can say that the whole organisation of the Church, from Christ to the abbots and bishops, presents itself as a pastoral organisation. (...) Religious power, therefore, is pastoral power*” (Foucault 2009, p. 153). Given the fact that pastoral power is not only concerned with spiritual issues, but also with the government of everyday life, including the administration of goods, “it is, then, a form of power that really is a terrestrial power even though it is directed towards the world beyond” (Foucault 2009, p. 154). In this sense, research into the way religious organisations are governed can foster an understanding of the way other types of organisations are governed.

The government of men, is linked, as outlined before, to pastoral power and to the direction of souls: “*the pastorate gave rise to an art of conducting, directing, leading, guiding, taking in hand, and manipulating men, an art of monitoring them and urging them on step by step, an art with the function of taking charge of men collectively and individually throughout their life and at every moment of their existence*” (Foucault 2009, p. 165).

To define pastoral power, Foucault (2009) uses two sets of texts from the Christian tradition: the first set, from the early years of Christianity, is composed of John Chrysostomos’ *De Sacerdotio*, Saint Cyprian’s *Epistles* and Saint Ambrose’s *De Officiis Ministrorum* and the *Liber Pastoralis*; the second set of texts is composed of John Cassian’s *Conferences* and the *Cenobite Institutes*, Saint Jerome’s *Letters*, and

Saint Benedict's *Rule*. The first set of texts concerns the communities of the faithful that characterised the early years of Christianity, whilst the second set of texts was not used by Christian communities but by monasteries. Based on a reading of these texts, Foucault (2009) defines pastoral power around three dimensions:

1. The objective of pastorate is salvation.
2. To fulfil salvation, either the individual or the community must obey the will of God transmitted through law.
3. The pastorate predicates a particular truth, that of Christian faith.

Pastoral power links salvation, law and truth. However, pastoral power's originality does not originate in this link, since such a link characterises any kind of power. What really distinguishes pastoral power as a distinct form of power is the extent to which such power is used.

The first dimension of pastoral power, salvation, is related not only to individual salvation, but also to the salvation of the community. The community, for the pastorate, is a unity, a whole (Foucault 2009, p. 168) and the pastor is responsible for each and everyone in the community, as well as for the community as a whole. This relationship between the pastor and his flock entails what Foucault calls the "paradoxically distributive" (Foucault 2009, p. 169) character of Christian pastorate. The paradox emerges from the fact that, to save the community, the pastor might be obliged to sacrifice one of the members. Foucault, after the reading of the above mentioned Christian texts, adds more four principles to the paradoxical distributive

one. These principles are: the principle of analytical responsibility, which states that the pastor is responsible for the accountability of each and every sheep in numerical terms (a numerical distribution of the merits and faults of every member of the community); the principle of exhaustive and instantaneous transfer, which states that the merits and faults of each member of his community are transferred to the pastor; the principle of sacrificial reversal, which states that the pastor must be prepared to die to save the members of his community; the principle of alternate correspondence, which states that the pastor's merits and faults influence the community's salvation, since the pastor's example is fundamental to guide the sheep to salvation.

The second dimension of pastoral power, the law, makes the pastorate different from other forms of power, insofar as it is based on the notion of obedience. Obedience is not only respect for the law. Christian obedience, as Foucault defines it, is "pure obedience" (Foucault 2009, p. 174). Pure obedience is closely related to the Christian belief that the law manifests God's will. In this sense, pure obedience is complete subordination, which constitutes:

1. Submission of one individual to another, institutionalised in monastic life in the relationship between the abbot and a monk.
2. The relationship of obedience has no specific end rather than obedience itself, leading to a state of pure obedience grounded in humility.
3. The absence of passions, meaning that each member of the community has to renunciate his own will.

Obedience, as a distinct feature of pastoral power, seems to be closely related to processes of individualisation and care of the self through destruction of the self (Foucault 2009, p. 180).

The third dimension of pastoral power, truth, means that the pastor is responsible for teaching his community. However, two aspects distinguish the conception of teaching proper to the Christian pastorate:

1. Teaching is a “*direction of daily conduct*” (Foucault 2009, p. 180).
2. Teaching is related to spiritual direction, meaning that not only truth, but also and foremost the direction of conscience are part of teaching as a pastoral function.

The direction of conscience is, together with pastoral power, fundamental to the understanding of the notion of government (Foucault 2009, p. 123). The direction of conscience is not voluntary; it is permanent and concerns every detail of one’s life. A further vital feature of spiritual direction is that it is not aimed at self-mastery. The main objective of spiritual direction is to tell the so-called spiritual director all the details of one’s spiritual life. In this sense, spiritual direction is “*an instrument of subordination*” (Foucault 2009, p. 183). Because every detail of spiritual life is to be examined every day, “*a particular discourse of truth on the self will be formed through the examination of conscience*” (Foucault 2009, p. 183).

The dimension of pastoral power as previously outlined attempts to demonstrate the uniqueness of pastoral power as a new form of power. Through pastoral power,

Christianity sets up “*specific modes of individualisation*” (Foucault 2009, p. 184), with individualisation defined in three ways:

1. The balance of individual merits and faults at each moment.
2. The subjection of the individual to the other, with a general attitude of servitude towards everyone.
3. The production of an individualised truth.

“*Analytical identification, subjection and subjectivation are the characteristic procedures of individualisation that will in fact be implemented by the Christian pastorate and its institutions*” (Foucault 2009, p. 184). The influence of the pastorate in governmentality will occur in two ways:

1. Through the procedures it implemented to foster pastoral power, mainly mechanisms associated with the objective of salvation, through obedience and the uncovering of individual truth.
2. Through the constitution of a specific subject, “*analytically identified, who is subjected to continuous networks of obedience, and who is subjectified through the compulsory extraction of truth*” (Foucault 2009, p. 185).

The form of government based on pastoral power procedures and on the subject created through spiritual direction would take form in the 16th century. How this occurred will be addressed in the following paragraphs.

The set of techniques and procedures constitutive of the pastorate were named as the “*economy of souls*” by Gregory Nazianzen (Foucault 2009). This economy of souls referred to the “management of the family, of its goods and wealth, the management or direction of slaves, of the wife, and of children” (Foucault 2009, p. 192). According to Foucault, the economy of souls is best translated by the expression “*conduct of souls*” (Foucault 2009, p. 193). Conduct, a word introduced in the 16th century, can have two meanings: the activity of conducting and how one conducts oneself, *id est*, lets oneself be conducted. It is through these meanings associated with conduct that the pastorate was introduced into Western society, mainly through the notion of governmentality. The pastorate and governmentality are both associated with the methods, instruments and procedures developed to conduct men and to control the way men conduct themselves. Being a specific form of power, the pastorate must have come across resistance to its implementation. Examples of this resistance include the various sects developed in Christianity, the Reformation begun by Luther and, after the 18th century, secret societies as a form of developing a way of conduct distinct from the one envisaged by the ruling institutions. All these forms of resistance will be called “*counter-conduct*” (Foucault 2009, p. 201).

The pastorate had been institutionalised through a set of techniques and procedures based on the distinction between the clergy and the laity. This dimorphism would be the base for some of the counter-conduct revolts developed in Christianity, especially the Reform of the 16th century (Foucault 2009). For Foucault, the Reform is a counter-conduct movement that put into question the Catholic judicial apparatus based on the practice of confessing one’s sins, and on the system of indulgences that

was linked to a judicial model in which the Pastor plays a major role (Foucault 2009, p. 203). Counter-conduct movements were also found at the doctrinal and individual behaviour levels. An example of the latter was the appearance of the Third Orders, which were laity branches of existing Religious Orders, such as occurred with the Franciscans and with the Dominicans. Another example was the appearance of a new religious “*way of relating to God*” (Foucault 2009, p. 204), known as *Devotio Moderna*. The *Devotio Moderna* encompassed new elements to the way one was supposed to relate to God. However, it is questionable whether one can consider the creation of the Third Orders as a counter-conduct movement. Historically, the Third Orders appeared with the Mendicant Orders and were related to the assumption that a lay individual, living a secular life, could conduct a form of life that would lead to Salvation (Knowles 1966). Since its inception, Christianity had always regarded the religious form of life as the most perfect and, as previously outlined, the hermit form of life was regarded as the purest and most capable way of leading to Salvation (Lawrence 2001). This gradation of the various forms of life always considered secular forms of life as less perfect. The foundation of the Mendicant Orders, with their focus on the evangelisation of every member of the Catholic Church, and with their objective of saving everyone’s Soul, and not only the Soul of the Monk, was the starting point of a new form of Mission that would, later in the 16th century, lead to the Missionary activity of the Catholic Church in both the New World and in Protestant Europe (Clossey 2008).

The most important work of the *Devotio Moderna*, the *Imitation of Christ*, attributed to Thomas of Kempis, became a fundamental spiritual work in the fifteenth and sixteenth centuries, with a significant influence on Ignatius (O'Malley 1993).

Foucault (2009, p. 204) identifies five points common to all the main forms of counter-conduct that developed through the Middle Ages:

1. Asceticism - the development of monastic life is in contrast with ascetic life practices. All the procedures of monastic life, centred in obedience and in Rules to be applied to all the members, are opposed to ascetic life, such as that of the Anchorites.
2. Community - communities are religious groups (distinct from Religious Orders) that challenge pastoral power, mainly because they are based on the questioning of the moral profile of the Pastor. If a Pastor is in a state of mortal sin, should he confess lay people or administer sacraments? That is, does a state of mortal sin suspend the power of the Pastor? Several religious communities were formed through Middle Ages in order to challenge the existing pastoral power structures.
3. Mysticism - mystical experience is, by definition, outside any form of power, insofar as it is an individual experience.
4. The Scripture - the system of pastoral power relied heavily on the absence of the preaching and teaching of the Pastor. The Scripture being a text in no need of “*pastoral relay*” (Foucault 2009, p. 213) would underpin some counter-conduct movements.

5. Eschatological beliefs - if Christ is to return, then the Pastor is compromised by the menace of the coming of the true and only Pastor, Christ.

In this sense, “*Christianity in its real pastoral organisation is not an ascetic religion, it is not a religion of the community, it is not a mystical religion, it is not a religion of Scripture, and, of course, it is not an eschatological religion*” (Foucault 2009, p. 214). This assertion is highly questionable for various reasons.

First, there is no historical evidence that monasticism emerged primarily as a counter-conduct movement to ascetic forms of life. The various founders of Religious Orders always considered ascetic forms of life as being the highest form of life. Since the foundation of the first Monasteries, various different Rules had stipulations regarding the purity of hermitical forms of life, and made clear that a Monk could lead a more ascetic form of life inside the boundaries of the Monastery, as long as the Abbot approved it. In his seminal work, Lawrence (2001), goes further and provides historical evidence that supports the idea that the first Monasteries might have been founded because a hermitical form of life is so difficult to carry out alone, and that a cenobitical form, although less perfect, might be more adequate to the average candidate of a Religious Order.

Second, although it is true that several communities gave birth to counter-conduct movements, commonly referred to as heretic movements such as the Arians and the Albigenses²⁶, the conundrum related to the possible sinful character of the Pastor was

²⁶ These are two of the most famous heretic movements that occurred before the Reformation in the European geographical boundaries.

The Organising Principles of the Society of Jesus always dealt with by the different Rules. All the Religious Orders' Rules provided orientations towards possible routes of action in the case of the Abbot misbehaving or, using the obedience vow, ordering actions that are either clearly sinful or impossible to attain. In this sense, as regards the Religious Orders, the question raised by Foucault on the credibility of the Pastor was always taken care of by the different Rules through the deployment of specific practices for the election of those governing the Monastery (Moulin 1952; Moulin 1955; Moulin 1964).

Third, Foucault is correct when he places the mystical experience outside any form of power. However, as will be clarified later when the topic of the Society of Jesus is addressed, the mystical experience can be related to a particular form of knowledge, the so-called knowledge of the subject (Rahner 1964). This particular form of knowledge neither represents a form of counter-conduct, nor is it detached from institutionalised forms of power. Some of the governance mechanisms of the Society are clearly oriented towards the possibility of aligning the mystical revelation of God's will to the individual with the objectives of the Religious Order, always making use of the vow of obedience.

Fourth, after the Mendicant Orders' foundation, Pastoral power relied on the preaching and teaching of the Scripture. After the Reformation, with the foundation of the Society of Jesus, the interpretation of the Scripture and the use of casuistry to try to shape individual conduct would be extensively used, either in traditional Pastoral settings, or in the Missions of the New World (Keenan 2004).

Fifth and finally, it is contentious to affirm that Christianity “is not an eschatological religion” (Foucault 2009, p. 214). The decline of the belief in the second return of Jesus to Earth was paralleled by the rise in the value accorded to Missionary work. Missionary work, as associated with the discovery of the New World, is clearly eschatological. The possibility of and the need to save the Souls of those that never had heard about Jesus was one of the main founding objectives of the Society of Jesus, and was the linchpin of all Missionary work between the 16th and the 18th centuries (O'Malley 1993; Clossey 2008).

However, according to Foucault (2009), these five themes of counter-conduct would be the basis of the great division between Catholics and Protestants that occurred in the 16th century, and, as a consequence, would foster the Counterreformation of the Catholic Church. This is crucial to an understanding of the influence of the pastorate in “governmentality” structures, because after the Reformation / Counterreformation period the pastorate would take care of both material and spiritual aspects of an individual’s life. It is what Foucault describes as an “*intensification of the religious pastorate*” (Foucault 2009, p. 230), that would make the historical period beginning in the 16th century as the “*age of forms of conducting, directing and government*” (Foucault 2009, p. 231).

Foucault’s analysis of this period is centred on the emergence of a notion of government of the state, which, being different from sovereignty and pastoral power, must find its own rationality (Foucault 2009). Governmentality is concerned with a new reality, the economy, and with a new object, the population (Dean 2010).

Therefore, studies on governmentality try to uncover how the “*governmentalization of the state*” occurred (Dean 2010, p. 30). These studies are typically an analytics of government, “*a type of study concerned with an analysis of the specific conditions under which particular entities emerge, exist and change*” (Dean 2010, p. 30). The analytics of government is based, therefore, on the analysis of the emergence, maintenance and change of regimes of practices, which are “*ways of going about doing things*” (Dean 2010, p. 31) at the institutional level. There are multiple regimes of practices in a society, such as the “*criminal justice system*”, the “*health system*” or the “*social welfare system*”, which can be interchangeable in the sense that one particular regime of practices can borrow practices from other regimes (Dean 2010). Following an analytics of government, one should ask how relations of obedience and authority are constituted, how specific government mechanisms emerged, how forms of thought, knowledge, expertise, means of calculation, rationality give rise to specific practices of governing and henceforth to specific forms of truth, and how specific forms of conduct are fostered in order to build the type of identity presupposed by a specific practice of government (Dean 2010).

The development of pastoral techniques for the conduction of people is associated with the development of Christianity up to the 16th century, and although the government of Religious Orders evolved, it was always founded on the relationship between the pastor and his shepherd. However, by the 16th century the pastoral relationship was closely associated with the notion of care for those in most need and with the education of the young.

As for the individuals to be conducted by pastoral government, the three main techniques through which individualisation is achieved are: the analysis of the merits and faults, the obedience and the individual's relation to God's truth so that a hidden truth is produced (Dean 2010, p. 92). Several questions arise because of the techniques of individualisation typical of the pastorate (Dean 2010, p. 92-93):

1. Is the contemporary pastorate different from its early Christian version because the individual is nowadays normalised in relation to scientific knowledge?
2. Did the pastorate suffer a transformation around the 18th century which entailed that the modern pastorate is nowadays concerned with each member of its population?

It is in this sense that Dean associates the pastorate not only with salvation, obedience and truth, but also with the notion "*that the exercise of pastoral power rests on a specific conception of the potential inclusion of all humankind within community, the solidarity of rich and poor, and the duty of almsgiving*" (2010, p. 99). The latter are closely associated with Roman *euergetism* and philanthropy (Dean 2010).

The next section will trace the historical development of the mechanisms deployed by different Religious Orders in order to attempt to uncover possible transformations suffered by the pastorate until the 16th century.

7.1 The Transformation of Pastoral Power

Religious Orders are the institutionalised form of a religious way of life, underpinned by the eschatological possibility of Salvation of the soul (Ranft 1987). This would influence all future Religious Orders, although in different ways (Clossey 2008). The main driver of a religious life is the identification of one's behaviour with the behaviour of Jesus Christ himself. This has led, inside the Catholic Church, to the understanding that there are three main characteristics of Jesus Christ's behaviour that made him distinct: a life in poverty, chastity, combined with a strict acceptance of God's will. These three dimensions led to the Catholic Church's belief that those who lived in poverty, chastity and in obedience to God were conducting a religious life, as distinct from a secular life that characterises lay people (Lawrence 2001). Religious Orders have been the manifestation of the Catholic Church's adaptation to society, through adaptations that have followed the main concerns of the society that they were supposed to serve (Francis 1950). This brings the focus onto the main changes that occurred in the way Religious Orders organised themselves.

The first manifestations of religious life were the hermits and the anchorites (Lawrence 2001). These were people that escaped the secular world in a radical way, living in the desert and practising the *Laus Perennis* (continuous adoration of God). The desert as a location allowed a life in poverty and chastity away from the menaces that were part of the Catholic life before the conversion of the Roman Emperor Constantine in the 4th century. Martyrdom was, at the time, one of the consequences of religious life, given the religious persecution of Catholics by the

Roman Empire. The hermits and the anchorites were individuals who soon attracted followers, people that wanted to conduct a religious life detaching themselves from the secular world. These groups of people conducting what was understood as a religious life are the origin of the first forms of organised religious life, known as Monasteries. These monastic communities appeared in the desert, in the Near East, but after the 4th century cenobitical life was legally recognised by the Catholic Church and accepted by secular authorities.

The emergence of monastic communities in other spatial locations rather than the desert does not mean that the desert, as a metaphor, is absent. The desert would continue to signify the space where one can find God (Debray 2001); the monastery was the new physical location where all those that aspire to a religious life were gathered. In the fourth and fifth centuries monasteries started to spread all over Europe and, as a consequence, the need to formalise life inside the monastery emerged. The norms that prescribed life inside a monastery were set up and have been known, until the present day, as Rules. The first Rule was, according to tradition, from the authorship of Saint Pachomius (Rousseau 1999). However, the first Rules with relevance in the sense that they originated from one type of Religious Order, the Canons Regular, were authored by Saint Augustine in the 5th century (Moulin 1964). In the 6th century Saint Benedict of Nursia sets up the first Benedictine monastery, and with it the Rule of Saint Benedict, which would be highly influential, and served as the basis for another type of Religious Order, the Monastic Order.

The subsequent growth of Religious Orders led to what could be denominated as a formalisation process. However, besides growth, there seems to be another reason for the formalisation that these Rules represent. The radical acceptance of the will of God is one of the three pillars of religious life. Soon after the foundation of the first monasteries, the need to establish who represented God inside the monastery emerged, and this would be one of the main reasons for the creation of Rules and, accordingly, for the formalisation of several processes such as the admission of new members, the dismissal of members and the election of the member who will represent God. Religious life would therefore move towards an organised way of life, in the form of a Religious Order, and with the following enduring principles still valid in existing Religious Orders up to the present day:

Religious Orders are a different way of life inside the Catholic Church.

Religious Orders' members have metaphysical deeds and therefore do not embrace secular objectives for themselves.

Religious Orders' members rely in God.

Given these characteristics and the sudden growth in the number of people willing to adopt a religious life, the existing Religious Orders soon recognised the need to organise themselves around these principles. The mechanism found to foster organisation was the nomination of someone to lead the monasteries, basing this mechanism on the strong belief that Man is not responsible for his actions – God is – and aligning this with the radical acceptance of the will of God, embodied in obedience as a governance mechanism. As a consequence of the organising process

The Organising Principles of the Society of Jesus of religious life, Religious Orders' members would have as a distinctive characteristic inside the Catholic Church the fact that they take three vows (Kardong 2010): of Chastity, Poverty and Obedience. The vow of obedience is related to the belief that anyone elected by the other members to become what is called an Abbot will literally represent God. The belief that Man cannot master his life underpins the obedience vow and, as a consequence, one of the main governance mechanisms of Religious Orders is the set of mechanisms used for the election of their Abbots. The Superior is someone believed to represent God's will in every detail of his command, and must be characterised by what could be called proper behaviour, someone recognised by his wise judgment (Lawrence 2001). Therefore, not only the election of an Abbot is based on formal procedures, but the possibility of his dismissal in the case of fraud or misconduct is also acknowledged in the Rules of all Religious Orders. Two dimensions of the organising principles of the Rules emerge from this:

Religious Orders are organised envisaging the conduct of proper behaviour for all its members.

The Abbot is responsible for assuring the conduction of proper behaviour in all those members under his responsibility.

The powers of an Abbot are immense, covering both spiritual and administrative issues. However, the power of an Abbot has only one objective: the edification of those under his authority (*Omnem Auctoritatem ad Aedificationem*) in order to allow them a proper conduct of their lives, according to their Religious Order's way of

adopting a religious life. Although immense, the Abbot's powers are usually limited in two ways:

The Abbot cannot command any member to commit a mortal sin.

The Abbot cannot destroy or suppress the community.

As long as these two limits are not in question, Religious Orders' members must obey their Abbot "like a dead body" (*Perinde ac Cadaver*). The fact that an Abbot cannot overstep the above limits is relevant insofar as this reveals that the Abbot's power is limited by a Rule that he did not write and cannot change through his own will. The Rules and / or Constitutions²⁷ of Religious Orders are not only administrative documents with details regarding several procedures, but founding documents in the sense that they were written by the founder of the Religious Order with the objective of organising an entity that is beyond its members.

This entity that is beyond all its members is organised around two elements:

1. The Rules or Constitutions of the Religious Order.
2. The Chapters or Congregations.

The Chapters or Congregations are assemblies of members chosen by other members to attend them. The main characteristic of the Chapters or Congregations is the fact

²⁷ The difference between a Rule and a Constitution will be addressed later.

that they possess all the legislative power, with the authority to change the Rules or the Constitutions.

The emergence of the first monastic movements, starting in the 3rd century through the fourth and the fifth centuries, draws upon the above-mentioned principles. However, between the 6th and the 8th centuries, the Benedictine monasteries increase in number and influence; at the beginning of the 10th century, the Rule of Saint Benedict covered a significant portion of Europe. After the 10th century, several monasteries started to group themselves in Orders, such as the Order of Cluny, the Order of the Chartreux, the Order of Cister and several hospital and military Orders, for example the Templars. The rise of urban life would pave the way for the emergence of a new kind of religious Order at the end of the 12th century, the Mendicants (Francis 1950). In less than one century, two new religious Orders emerged: the Franciscans and the Dominicans (Freed 1977). The Franciscans and the Dominicans were the first Religious Orders to have objectives that went beyond the mere gathering of people who had embraced a religious way of life. As a matter of fact, the Franciscans dedicated themselves to the caring of the poor, and the Dominicans to the study of God's word and the teaching of theology. Although this does not signify that other Religious Orders did not undertake those kinds of works too, it is significant that the Franciscans and the Dominicans decided to adopt objectives that surpassed the mere perfection of life through living in a Monastery. Between the 13th and the 16th centuries, the Catholic Church would not approve any other significant changes in the way Religious Orders were organised. Religious

Orders, therefore, at the time of the 16th century, were characterised by the following:

1. Observance of a Rule or a Constitution.
2. Objectives, either tangible, as in the case of the Templars, or intangible.
3. An alternative way of life inside the Catholic Church.
4. A distinctive spirituality.

The distinctiveness of Religious Orders' spirituality is evident in the Latin aphorism *Bernardus Valles, Montes Benedictus Amabat, Oppida Franciscus, Celebres Dominicus Urbes*²⁸. Each religious Order not only has different objectives but, although similarities are shared in some of the objectives, the way of life and the founder's spiritual characteristics are dimensions that give each of the Orders a different role inside the Catholic Church. However, in terms of the administrative organisation of each Order, Saint Benedict's rule had at the time of the foundation of the Society of Jesus a significant influence, and was viewed by the Catholic Church as a benchmark for all new Rules or Constitutions proposed by new founders.

Before going deeper into the analysis of the way different Religious Orders governed themselves, it is important to note, as a conclusion, that these forms of organisation inside the Catholic Church were driven by a distinction between a secular and a religious form of life. Traditionally, the latter was always considered to be more

²⁸ This aphorism translates the places the Religious Orders' founders preferred to raise the first Monasteries or Convents: Saint Bernard preferred the valleys, Saint Benedict the Mountains, Saint Francis the cities (fortified cities in the original Latin), and Saint Dominican the highly-populated cities.

perfect and more capable of leading to the Salvation of one's soul (Lawrence 2001). Religious forms of life had assumed, since the 3rd century, several forms that can be divided in the hermitical and in the cenobitical. However, the hermitical way of life, much more austere, was always considered to be the highest form, and therefore the most perfect (Lawrence 2001). The cenobitical form of life, whilst less perfect because it was more suitable for the average individual, was the one that underwent more developments and gave rise to different Religious Orders. The cenobitical form of life has been centred, since Saint Pachomius' Rule, around two main principles: the use of a Rule to guarantee uniformity of behaviour inside the Monastery, and the reliance upon the vow of obedience to an elected Superior. In this sense it is of utmost importance that one tries to understand what distinguishes the different Rules adopted by different Religious Orders, and how the vow of obedience was practised. Variations in these two organising principles of Religious Orders might shed light on possible shifts in the concept of Pastoral power.

7.2 Critical discussion on Pastoral Power

The research conducted by Foucault on madness, sickness, delinquency and sexuality (Foucault 1990; Foucault 1991; Foucault 1992; Foucault 1998; Foucault 2001) has brought the focus onto the way the modern subject has constituted himself. Foucault, in the above studies and throughout most of his research, analysed power. The analysis of power undertaken by Foucault uncovers the technologies of power that lie behind the power of the State, and is centred on an analysis of experience and meaning: Foucault focused on the multiple ramifications of power, on the techniques (such as the technologies of imprisonment) and rituals where power manifests itself

with a real influence on the body. The reality associated with the influence of power in the body means that power is action, rather than a power that one possesses, such as the sovereign power (Foucault 2009), or a power that is based on a social contract, such as the power of the welfare state (Foucault 2009; Dean 2010). Power is therefore associated, mainly, with the production of reality, rather than only with censorship or exclusion. It is in this sense that power is consistent with the notion of governmentality as the “conduct of conduct” (Dean 2010).

The history of the emergence of the disciplinary apparatuses allows an analytics of government capable of showing the drivers of individualisation. Therefore, the analytics of the apparatuses of power underpins the understanding of the history of the modern subject, and consequently the genealogy of our subjectivity.

This analysis of the emergence of the apparatuses of discipline in the seventeenth and eighteenth centuries fosters the need to conduct an analytics of government. This movement from an analysis of power to an analysis of governmentality occurs when Foucault begins to analyse institutions based on their relations of power, instead of analysing institutions based on their external apparatuses and trying to uncover the strategy of power that lies behind the institutionalisation process (Foucault 2008; Foucault 2009). In order to analyse the relations of power inside institutions, Foucault needs to define power as related to governmentality - power is how one acts over the actions of others. In this sense, governmentality entails all the techniques and procedures that are constructed to conduct the conduct of others. Therefore, shifting the analyses of power from the external apparatuses implemented in several

institutions to the analyses of the institutions based on their relations of power, entails that the meaning of governmentality will embrace a wider range of forms of government, such as those associated with the conduction of the family, the conduction of children, the conduction of the state or the conduction of souls (Foucault 2009). The analysis of the relations of power inside an institution allows an understanding of the way men conducted the conduct of other men, uncovering the genealogy of modern man's subjectivity (Foucault 1990; Foucault 1992; Foucault 1998).

It is based on the former perspective that "biopolitics", as an analysis of power over population, will be related to the uncovering of a political rationality behind the modern State. The analytics of the techniques of government of the State that explain the origins of the modern art of government will allow an analytics of a technology of power, where the main objective will not be the community, but the individual as a member of a population (Dean 2010). The emergence of disciplinary apparatuses is therefore linked to the need for managing the population, not only as a whole, but also in detail. The knowledge regarding the best way to govern is, in this sense, associated with knowledge about the population and the individual. Foucault identifies in his research a movement away from a way of government centred not only on a territory and its people, to a way of government centred also on the individual life of each man, his habits, needs, behaviours and thoughts (Foucault 2009). The form of power associated with this new way of government has, as its main objective, to conduct individuals constantly and permanently. This form of power, distinguished from sovereign power, emerged in the Western world in the

18th century (Foucault 2009). It is reducible neither to a juridical form nor to economic and political issues. The emergence of the governmentality of the modern State would lead to the adoption of techniques of individual and collective conduct: the knowledge of human affairs would be divided into analytical knowledge about the individual, and statistical knowledge about the population (Dean 2010), associating government with the government of men.

According to Foucault, the modern State employs a technology of power characteristic of Christian institutions - pastoral power. This form of power would emerge as a technology of power used by the modern State around the 16th century, with the Reformation and Counter - Reformation movements (Foucault 2009). It was with the religious schism of the 16th century that the pastoral form of government moved from religious institutions to political institutions, leading to the emergence of modern man through the adoption of pastoral techniques of conduction. The history of the pastorate uncovered the individualisation procedures and the specific structure of power over individual souls and the flock chosen by religious institutions. The history of the pastorate is therefore the history of modern subjectivity.

The theme of the pastor appeared before the Christian era. However, in Christendom the pastorate is always associated with the power the pastor exerts over the flock and each of its members. The role of the pastor is always related, in Christendom, to the care for all the individual members of the flock. Since the care for each individual is of the utmost importance, the pastor is supposed to know each member of the flock thoroughly. The pastor, who is a pastor of souls, must know how to recognise

different human characteristics, the inner passions that drive a soul and all the hidden thoughts, so that he can help each member to live according to a way of life that will lead to the eternal salvation of the soul. The conduct of the flock has associated with it knowledge of the individual.

Monasticism deployed a group of rules and procedures to direct the soul correctly. The emergence of different types of religious institutions, although related to different reasons, some of which were taken from changes in society, fostered the development of a set of rules for the direction of souls in great detail. The Abbot, whenever elected, had at his disposal several procedures and rules that allowed him to better conduct the members of his Monastery. Through the Middle Ages the pastoral techniques of monastic life were adopted progressively by secular priests. The latter would be the pastors of their parish, and lay people were to be conducted by the priest, just as the Abbot conducted the monks. Knowledge of the different types of behaviour that characterise an individual has been important for Religious Orders since their inception. Saint Pachomius, for instance, would divide the monks not only according to their duties, but also according to their intellectual and spiritual capabilities; indeed the Pastoral Rule of Saint Gregorius the Great characterised thirty-nine types of individual, classified according to their socio-cultural background and several dimensions of their character (level of humility, level of patience, presence or not of depressive behaviour, among others).

Spiritual direction emerges as a way of accessing the inner reality of an individual, the secrets of a soul. The minutiae associated with the daily examination of

conscience is one of the most vigorous ways of knowing a soul through the accounting of sins and virtues, and these techniques of spiritual direction underpin pastoral power. The government of souls, achieved through the direction of conscience, is based on obedience, the examination of conscience and the sacrament of confession.

Foucault traces the origins of Christianity's pastoral power to the anchorites (Foucault 2009). As regards their way of life, the anchorites are identified with eschatology, martyrdom, asceticism and solitude. The anchorites are therefore the archetype of a way of life distinct from secular life, especially a way of life that refuses secular authority and power. The anchorites, who typically lived in the desert, associated a perfect life with a life in retreat from the secular world. The desert, as a metaphor for inner life, would influence Christian spirituality, and the perception Christians have of God, from its inception (Debray 2001). The desert allowed the anchorites to conduct an austere life, an extreme form of asceticism necessary for the achievement of perfection and the salvation of one's soul. The desert not only imposed severe physical conditions on the anchorites, but also allowed them to identify the various forms of temptations that an individual endures.

The anchorites led their lives according to the belief that it was possible to progressively change an individual. Ascetic practices were supposed to conduct to a life that was indifferent to all temptations. Such a way of life would be proper of men believed to be superior individuals, capable of things not achievable by common individuals. From an institutional point of view, such ascetic practices could be seen

as being in opposition to official doctrine. The Catholic Church did not support straightforward asceticism and mysticism due to possible conflicts between officially-approved doctrine and the potential doctrine that could arise from a mystical experience. Due to the identification and persecution of several heresies of mystical inspiration, the Catholic Church would always approach mystics, and accounts of mystical experience, with extreme prudence, leading, in several cases, to conflicts between the Catholic Church and some individuals. The anchorites were especially associated with mystical experiences due to the absence of a leader, a pastor. The figure of the Pastor, as well as the belief that asceticism by itself was difficult to attain in solitude, would foster the development of organised monastic life inside the Catholic Church.

Cenobitical and monastic life was organised around the belief that all individuals are sinful, and that human communities are groups of sinful individuals. The figure of the pastor would emerge as the solution for a sinful life insofar as he would be responsible for helping others to conduct a way of life that might lead them to the salvation of their souls. However, a distinctive characteristic of pastoral power is the assumption that the pastor is not different in nature from the other members of the flock; the assumption that the pastor is not perfect will underpin the establishment of Religious Orders' governance mechanisms. The community of the sinful needed, therefore, discipline and clearly-defined rules. The overall will for asceticism required an organisation, a rule, a defined discipline and a superior. These were the principles behind the first monasteries founded by Saint Pachomius in the East and, in the 4th century, and those founded by Cassian, at Marseille, in the 5th century. These

monasteries were organised under a well-defined hierarchy, a disciplinary regime and the authority of the Abbot. Monasticism was founded on the principle of obedience to the superior, the Abbot. The main difference, therefore, between anchoritism and monasticism resides in the fact the latter centres itself around the sacred value of obedience, while the former centred itself on asceticism as a way of mastering one's own body. Although obedience is an individual vow which must be attained individually, it would be the fundamental rule of organised monastic life, insofar as obedience to the Abbot was one the pillars of the centralised structure typical of a monastery.

The cenobitical or monastic institution is driven by the concern to help each individual to save his soul. This individual focus is characteristic of the pastorate as defined above. The monastic organisation educates its members, under the daily life of a religious community. The Abbot, although submitted to monastic rule like any other monk, would, as Pastor, be responsible for the community and each member of it. The role of the Abbot not only helps the understanding of the change from anchoritism to organised monastic life, but it also enlightens the figure of the religious superior as the Pastor of Religious Orders.

However, anchoritism and ascetic life were far from being suppressed by the time the first monasteries were founded. To avoid deviations from official Catholic doctrine, those who wanted to become anchorites had to secure some previous training and accept the guidance of a spiritual director. Cassian believed that there could not exist a proper religious life of any kind without spiritual direction, conducted by someone

much older, so that the conscience is correctly guided in all matters. By submitting all his desires, pleasures and will the monk combats, through the practice of obedience to a superior in the community and to a spiritual director, the sin of pride.

The direction of the conscience is grounded on two practices: the examination of conscience and the sacrament of confession. These two practices have one main objective: the transformation of the subject through the learning of obedience, discretion and humility. The discretion of the spirits is particularly crucial in forming the subject about the practice of choosing correctly in every matter of daily life.

The direction of conscience, together with obedience, leads the monk to report everything and to be prepared to obey every aspect of monastic and private life. The consequences of the direction of conscience are therefore twofold: assuring the cohesion of communal life and the proper conduct of private life. The Abbot, as Pastor of the monastery, is therefore the centre of communal and private life insofar as he is the one everyone must obey and report to. Since the Abbot is not, in principle, the director of the conscience of every monk, those who assume that role must be aligned in doctrine and way of conduct with the Catholic Church and the Religious Order.

The renunciation by the monk to his will is the main characteristic of monastic life. Neither previous forms of religious life, such as anchoritism, nor secular life required the renunciation of the will of the subject. In monastic life, even ascetic practices are under the authority of the superior, meaning that no one can submit himself to

corporal ascesis without authorisation. This is something that is clearly opposed to the way of life characteristic of anchoritism. The renunciation of the will is clearly a renunciation of the subject, where the degree of humility is the most important measure of the degree of renunciation of the subject.

Being the fundament and the objective of the direction of conscience, obedience is not supposed to be a mere promptitude to attain any command, but a permanent state: the subject is a subject in constant disposition towards obedience. Perfect obedience is achieved when the monk does not question in his mind, or orally, a command; he acts under a command with full acquiescence, and truly believes that the command is the best option to be taken and that any other option is solely based on personal pride. The monk who obeys in this way does not have a conscience that he is obeying and, therefore, is fully autonomous, because what he does is what he would do should he opt alone. The understanding of this mechanism is fundamental to understanding the construction of trust in the monastic setting: the most trustworthy monk is the one who always acts as he would act were he to ask for direction. The senior monk will, as a consequence, need less guidance than a novice, because the subject of the latter is not yet transformed.

An important characteristic of monastic obedience is the fact that the superior, by the time the first monasteries had been founded and over the course of several centuries, was not supposed to be an example of perfection of Christian virtues: to become the Abbot, the superior, there was no need for any type of qualification, experience or competence. It is curious to note that many Abbots were not even ordained as Priests

(Lawrence 2001). The practice of obedience is related neither to the content of the command, nor to the competence of the one who commands. Obedience is related only to the unconditional renunciation of the will. Monastic obedience, being one of the pillars of the Pastorate, is in clear opposition to the ancient practices of submission, such as stoicism. Ancient practices of submission of the will were supposed to lead the subject to a state of full independence: independence from other subjects, from passions, from exterior events. The objective of the ancient practices of submission was the achievement of personal perfection. Monastic obedience, however, imposed a relation of submission to another person, and the passive acceptance of any event. Ancient passivity, as in the case of the stoic, was related to the domination of interior passions: one should become passive in the sense that the passions had no effect on one's will, since one should be the sole master of oneself and not be submitted to passionate episodes. Monastic passiveness is precisely the submission to the will of another subject, the full renunciation to the possibility of commanding one's life. It is in this sense that monastic obedience is clearly contrary to ancient practices of submission and asceticism.

The submission of the will to the superior and to the spiritual director is at the core of monastic life grounded in the direction of conscience. The formation of the subject, in the context of the monastic Pastorate, is centred in the examination of conscience and in the sacrament of confession. The examination of conscience, conducted privately, is the first step in the submission of the will, since every aspect of private life must be submitted to the examination of the spiritual director. It is in the practice of the examination of conscience that the sacrament of confession is grounded. The

monk must not only obey in all matters, but he must also orally state all his faults. In the primitive Christian Church, the confession was public: the sinful person stated publicly that he had sinned, without analysing the sin. Monastic institutions would centre the sacrament of confession within the relationship between the monk and the spiritual director, who is responsible for critically analysing the list of sins brought up by the monk after the examination of conscience. Obedience to the superior in everything, and verbalisation of every sinful action or thought to the spiritual director are at the basis of the formation of the Occidental Christian subject under the Pastorate.

It was in the cenobitic organisation of the 4th century that the first techniques of exploration and knowledge of the Self emerged: the examination of conscience and the Sacrament of Confession emerged as the main apparatuses of Pastoral Power. These two practices were properly articulated in Christendom, forming the basis for the need to report to someone else, through obedience, and the need to report to oneself, through the examination of conscience. Obedience and the examination of conscience are required in order to achieve the *Discretio* of spirits. Antiquity saw Wisdom as the way to exercise power over oneself. Christian *Discretio* differs from Wisdom in that it is not related to the subject's independence, but to the belief that the soul is incapable, by itself, of achieving the necessary discernment to distinguish good from evil. It is to compensate the subject for this natural lack of discernment that the examination of conscience and the Sacrament of Confession are formed.

The lack of discernment, together with the presence of bad thoughts, may lead the soul to condemnation. Impure thoughts were something believed to be used by the Devil to tempt the anchorites: living in the desert, with no other source of temptation, the Devil chose thoughts as a means to try to divert the anchorites from the path to Salvation. The source of Evil is, in this sense, inside the subject. The fight between Evil and Good is fought in the interior of the subject. The Wisdom proper to Antiquity was related to the domination of oneself and over exterior objects through will. In Christendom, *Discretio* is the control over what lies inside the subject. The examination of conscience is therefore supposed to be more related with the interior movements of the soul than with exterior actions. The Sacrament of Confession is not only the enumeration of one's faults but a tool used by the monk to eliminate bad thoughts. Through the verbalisation of every thought, the Sacrament of Confession is a mechanism to analyse thought.

Christendom introduced a system to explore the subject and conscience, using to this end the mechanism of the examination of conscience and the Sacrament of Confession: the discursive verbalisation of all the movements of the soul makes access to subjectivity possible. The subject is capable of knowing the inner side of his soul with these two mechanisms. The examination of the self is therefore submitted simultaneously to obedience and to the verbalisation of thoughts. As a confessional religion, Christendom uses the authority of the priest as a governor of souls and as someone necessary for the salvation of the soul. Christendom builds a new form of power, with the objective of assuring the knowledge and the control of the daily conduct of each individual. At the monastic level, all the details of the daily

life of each monk are subjected to observation, a rule and surveillance. The subject does not use the direction of conscience as in Antiquity, where that technique was the means to achieving total control over oneself. Christian direction of conscience is an instrument to assure the full dependence of the subject to another subject through obedience, and to guarantee that the individual is truthful about himself. Truth about the individual is achieved through the renunciation of the self. It is this paradox of the renunciation of the self that constitutes the core of the Western Christian.

The Pastorate establishes a full set of mechanism to conduct individuals that is comparable neither to juridical forms of power nor to pedagogical methods. One of the main characteristics of the Pastorate is that it is not used solely to exert control over a collectivity, but also to constitute the individual in all his singularity, structuring his subjectivity. The Christian Pastorate establishes a link, using detailed reporting, between the Pastor and each member of the flock. Detailed reporting is used for the integral dependence of the individual to the Pastor, and total personal submission. In Antiquity, obedience was connected either to the Law or to the will of the city. In Antiquity, obedience was not submission, but a means to achieve control, perfection and equilibrium. Christian obedience is a value by itself, related only to the full submission of one's will to another individual.

Christian morality is based on the renunciation of the Self. Knowledge of the self is a means to renunciation, not an autarchic ideal, based on the perfection of the individual. Christian morality does not believe that the individual is capable, by himself, of achieving perfection, of even transforming himself. The relation with

God must therefore be mediated by obedience and the Sacrament of Confession to the priest (the Pastor), or the spiritual director. The Christian subject is someone to survey, to analyse. Through this inner truth, based on the analysis of the subject, obedience to the Pastor is made possible. The need to achieve subjective truth is what makes obedience possible, because the Christian subject believes that only through the relation with the Pastor can he be led to Salvation.

Monasticism was a step forward in the constitution of the Pastorate. Antiquity and anchoritism did not institutionalise the submission of the subject. Anchoritism was a form of asceticism closer to stoic practices than to monastic pastoral practices. The anchorite subject was formed through sanctity, achieved with the aid of ascetic practices capable of freeing the individual. The passive acceptance of another individual's will did not form part of the anchorite way of life towards Salvation. Monastic organisation of religious life constituted the first step towards the institutionalisation of the authority of the Catholic Church.

The Catholic Church created a set of mechanisms to conduct its members. These mechanisms would be especially relevant for the conduction of those who chose a religious life. The Pastorate would be institutionalised in different forms over the centuries. For a period of almost fifteen centuries, Pastoral power would be especially characteristic of Religious Orders, which developed outside the control of secular political power. By the 16th century, pastoral power would begin to influence the way political power organised itself in the modern State. The mechanisms of individualisation used by the Pastorate would diffuse through to the modern political

State through several different forms of individualisation and control of the subject, such as education, psychiatry, medicine and industrial organisations, among others.

7.3 Conclusion

The pastorate, as outlined previously, seems to have suffered various changes since early Christian communities were founded. There exist two main shifting points around pastoral power techniques that have already been identified by Foucault (2009). The first was in the 16th century, with the schism between Catholics and Protestants (Foucault 2009). The second occurred in the 18th century, and was linked to the development of the welfare state (Dean 2010) and the emergence of “biopolitics” (Foucault 2009).

Besides the changes that might have occurred in pastoral power techniques, an analysis of the evolution of Religious Orders’ government mechanisms shows that the latter also underwent substantial changes through the centuries. The Counterreformation period clearly represents a shift in the way Religious Orders were governed. This shift was embodied in the governance mechanisms of the Society of Jesus, which can be considered the first modern religious organisation (Francis 1950). However, if it is true that pastoral power techniques were behind the Christian schism of the 16th century (Foucault 2009), can it also be stated that these techniques underwent another change when the welfare state techniques for the care of individuals and population emerged? Whilst it has been acknowledged that pastoral power techniques underpin the governance mechanisms of religious

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organisations (Dean 2010), it seems that a thorough investigation into this relationship has yet to be undertaken.

Thus far, the relevance of several practices, such as the Direction of Conscience and the Confession, for the deployment of Pastoral power has already been asserted. The main governance mechanisms of the different Religious Orders, such as the vow of obedience and the use of the Rule, have also been analysed. Nevertheless, the eventual relation between individualisation techniques, such as the Confession and the direction of Conscience, and institutional practices, such as the use of the Rule and the vow of obedience, has not been properly established. The main dimensions of Pastoral power as a form of power are the absence of a territory, the focus on Salvation and the deployment of individualisation techniques. These are the three dimensions that would be transposed to the government of the Welfare State, giving birth to a new form of power known as governmentality (Miller and Rose 2008; Foucault 2009; Dean 2010).

What is striking is that Pastoral power is used to describe the relation between the Priest and the lay members of his parish, between the Abbot and the monks living in the Monastery he administers, and, after the emergence of governmentality, between liberal forms of the State and its citizens, yet is not used to describe modern managerial relations. Foucault, in his lecture on governmentality (Foucault 2009) uses the French word “gérer”, which means “to manage” seventeen times²⁹. Therefore it seems legitimate to question whether the Pastoral power framework, and

²⁹ I thank Professor Keith Hoskin of Warwick Business School for this insight.

The Organising Principles of the Society of Jesus governmentality as the “conduct of conduct” (Foucault 2009), can be used to analyse large, modern organisations.

In order to assess this question, a historical study of a specific modern organisation might be enlightening. In this sense, the Society seems to be of utmost importance insofar as it is a Religious Order and, therefore, according to Foucault, must deploy some form of Pastoral power; it was the first Religious Order with no territory limiting its activity (Clossey 2008); furthermore, it was the first modern Religious Order (Francis 1950). The way the Society deployed Pastoral power, and the new characteristics it presented, will be dealt with in the following chapter.

Part 3 – The Society of Jesus

The Society of Jesus

8.1 Introduction

The present chapter describes the Society's governance mechanisms. The structure of the chapter is divided in two main parts. In the first part, the Constitutions of the Society are analysed in full. After the analysis of the Constitutions, a description of all the governing offices will be made, followed by an extensive explanation of how correspondence is used for the government of the Society. The second part of this chapter describes and analyses the Exercises as a practice for the shaping of individual conduct.

The governance mechanisms of the Society will be analysed, tracing their historical evolution up to the present day. Although the Constitutions have not been altered, several changes to some of the offices have been made, and some of them have been eliminated. The main text of the Constitutions has remained unchanged because the Constitutions are more than a legal document: they entail the charismatic distinctiveness of the Society. Therefore, the analysis of the governance mechanisms, of the offices and of several practices, as with the use of correspondence, will try to uncover the ends, rather than the means, behind them, aligning the hereafter proposed analysis of the Society with the critical stance clarified in the preceding chapter.

From a methodological point of view, the adoption of an analytics of government could strongly justify the division of the current chapter into two parts: one considering the practices for the conduction of the entity, and the other the practices of the Self. Such division was not adopted for two main reasons. First, that was not the original division made by Ignatius, at least explicitly. Second, the organisational texts of the Society follow a determined hierarchy according to the Catholic Church's Canonical Law. The following paragraphs will explain how such a hierarchy is constructed and its relevance to an understanding of the Society.

8.2 The Formula of the Institute

The Society produces many organisational documents of different legal status and of different relevance to an understanding of the entity. However, it is not possible to somehow discard these documents, most of which were produced by Ignatius himself, with the help of his personal secretary, Father Polanco. All these organisational documents serve two main objectives: to clarify what Ignatius understood to be the “way of doing things” properly for the members of the Society, and to fulfil the Catholic Church's legal impositions on any Religious Order. The first objective is behind the significant number of letters (nearly 7,000) that Ignatius wrote to the members of the Society and the production of the *Directory of the Spiritual Exercises*, explaining how to minister them³⁰. The second objective, being

³⁰ Hereafter, all the references to the *Directory of the Spiritual Exercises* will follow Palmer's edition: Palmer, M. E. (1996). On giving the Spiritual Exercises: the early Jesuit manuscript directories and the official directory of 1599. Saint Louis, Institute of Jesuit Sources.

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compulsory, obliged Ignatius to devote the rest of his life after the foundation of the Society to the writing of the *Constitutions*, following the approval of the *Formula of the Institute*³¹. It is through the written documents produced during the early period of the Society that it is possible to grasp the administrative principles that led to the adoption of specific governance mechanisms, significantly distinct from those used by former Religious Orders (O'Malley 1993). During approximately the first forty³² years of the Society, the main concerns of those governing it were strongly related to the interpretation of what characterised its missions (O'Malley 1993). In this sense, the presentation of the first organisational document relevant to an understanding of the governance mechanisms, the *Formula of the Institute*, is of the utmost importance.

The writing of the *Formula of the Institute* was mandatory for any new Religious Order. In it, the founder of a Religious Order should define what characterised its way of life, distinguishing it from other already existing Religious Orders (Aldama 1990). The term *Institute*, in the Catholic Church's tradition, is used to designate a way of life and its juridical form. Therefore, the *Formula of the Institute* is a document that states what is most distinguishable in the way of religious life of the Society, and is the first organisational document to characterise the "way of life"

³¹ Hereafter, all the references to the *Formula of the Institute* will follow Padberg's edition contained in: Loyola, I. (1996). The Constitutions of the Society of Jesus - and their complementary norms. Saint Louis, The Institute of Jesuit Sources.

³² From 1540 till 1580. The year of 1580 is a landmark in the history of the development of some governance mechanisms, as will be made clear throughout this chapter. During these forty years the Society had the following Generals governing it: Ignatius, General Laínez, Saint Francis of Borgia, Father Mercurian and Father Aquaviva.

proper to its members. The *Formula of the Institute* is a document that states clearly what the objectives of the new Religious Order are and how those objectives will be achieved by means of characteristic missions. The meaning of the word *missions*, in the Catholic Church's Religious Orders context is related to what is specifically done, for example praying, agriculture and other manual labour activities, feeding the poor, education, preaching, among others. Every religious order has to translate its objectives, and the means for achieving them, into a document that clearly formalises every element of the *Formula of the Institute* in rules that condition the particular behaviour of the members of that Religious Order. This document, which is the juridical form of the *Formula of the Institute*, is, in the case of the Society and the Dominicans, the Constitutions, and in the case of other Religious Orders, the Rule.

Since by now it is clear that the Society has produced organisational documents that are mandatory in juridical terms, it will now be explained, briefly, what the relative importance is of these documents in the context of the Catholic Church. Every Catholic Religious Order has a legislative framework that distinguishes it from other Religious Orders. However, the Catholic Church's Canonical Law is above any rule or document of any Religious Order. Therefore, the *Formula of the Institute* is the type of document that, being important for distinguishing the Society as a Religious Order, always needs approval from the Papacy. That is why, at the very moment Ignatius and his companions decided to found the Society, the first thing they did was to go to the Vatican to obtain Papal approval for their endeavour. In juridical terms, after the Canonical Law, the second most important juridical documents of the Society are the Constitutions and the General Examine. The 34th Congregation

approved which norms of the Constitutions and the General Examine were declared, abrogated and derogated. Together with the Constitutions and the General Examine, the Complementary Norms, approved by the 34th Congregation, are as important in juridical terms insofar as they are an adaptation to contemporary times of the Constitutions.

For the Society, the third most important documents in juridical terms are the *Formula of the General Congregations*, the *Formula of the Provincial Congregations*, the *Formula of the Procurator Congregations* and the *Formula* to elect a temporary Vicar. Besides these *Formulas*, with the same level of importance, there are the rules on conduct that were approved in Congregations. These rules cover issues such as modesty of behaviour, the General Assistants', the General *admonitor*'s and the General Vicar's offices.

The fourth most important juridical documents are all the rules and orders promulgated by the General. Finally, the fifth most important documents are the Instructions sent to all the Society. Before proceeding to an analysis of the most important documents of the Society, the *Formula of the Institute*, the Constitutions and the Spiritual Exercises, a short description of what the rules and the instructions are will be provided.

The rules of the Society, the third most important document in legal terms, are divided into three groups: a summary of the Constitutions, the rules that are common to all the members and the rules that are specific to an office or class of membership.

The first rules to be published date back to 1540, and are related to common issues: rules that govern the way of study, on how to govern a college and on how to behave in a specific mission. Most of the first rules were written by Ignatius. The first formal publication of a set of common rules occurs in 1549. The main source for the composition of these rules is experience of the daily administration of the Society at the time. In 1552 the set of rules grows and incorporates rules on various offices and on several common matters, such as how to keep the spiritual and corporal elements aligned, on edification and, the most famous ones, on modesty.

In 1560 General Laínez published the first set of rules together with the first summary of the Constitutions. These rules were later modified by Generals Borgia (following a recommendation of the 2nd Congregation, 1565), Mercuriano and Acquaviva (1582). These rules remained unchanged until General Ledóchowski revised them in 1918. After the 27th Congregation (1923), a new set of rules was published in 1932 and, following recommendations from the 31st Congregation, General Arrupe abrogated several of the existing rules in an attempt to adapt them to local circumstances. Therefore, the rules were mainly adapted by the Provincials, and a document summarising their recommendations was published entitled *The religious life of the Jesuit* (Arrupe 1981). In 1990, General Kolvenbach abrogated the rules on 45 offices on the grounds that they were not adapted to contemporary circumstances. Therefore, the rules that remain valid are (CN§12, n. 3): on modesty (the same rules written by Ignatius), on the office of General Vicar, on the office of General Assistant and on the office of General *admonitor*.

According to the *Formula of the Institute*, the Superiors are responsible for the observation of all the rules, and all the members must read and meditate on the Constitutions on a regular basis (every month, preferably) so that “the way of proceeding” characteristic of the Society is appropriated (CN §415). The Provincials, on their annual visit to every House, must check if this recommendation is being accomplished.

Besides these rules, the Society recurs to other type of documents with different legal strength, and these are sometimes used for particular missions or circumstances.

These documents are:

The ordinations: these are norms promulgated by the General, which all the Society must follow. Ordinations can refer to issues such as studies, the administration of temporal assets, liturgical practices and so forth.

The instructions: these are norms that the General proposes to the Congregation. The instructions are guidelines, and only have legal power should they be declared by a Congregation, or if it is a matter in which the General has discretionary power. The instructions can refer to matters such as the media, doctrinaire issues, the administration of assets and so forth.

The directives: this is a document that provides guidance in a determined ministry, and generally refers to a very determined activity of the Society. A

typical example of this type of document is the directive on how to guide the Exercises.

It is noteworthy that all these documents cannot oblige a member of the Society under mortal or venial sin, which is a concern that also characterised previous Religious Orders' Rules, as described previously, especially in what was directly related to the vow of obedience. Ultimately, all the juridical norms can be related with the religious vows of obedience, poverty and chastity, framing religious life as a distinctive form of life in a legal framework. However, the entire juridical corpus of the Society can be understood as being part of the obedience obligation of any of its members (§602; GC 31, d. 4, n. 4).

The *Formula of the Institute*, which was approved by Pope Paul III on the 27th of September 1540, marking the date of foundation of the Society, stipulates the distinctive features of the Society through five chapters which will be analysed in the following paragraphs. Having been written by Ignatius and the other nine founding members of the Society in 1539, the analysis of the five chapters of the *Formula of the Institute* will show the distinctiveness of this Religious Order and underpin the subsequent analysis of the Constitutions. As stated previously, the *Formula of the Institute* cannot be changed by the Society without approval from the Papacy. However, the Society can interpret and adapt the *Formula of the Institute*, according to specific times and geographical locations, through the Congregation's decrees, always following the pivotal charisma of the document. In this sense, the pertinence

of the analysis of the *Formula of the Institute* lies in its centrality to an understanding of the way the Society organised itself around its mission.

The *Formula of the Institute* has five chapters and one conclusion, which comprise the following:

The first chapter describes the Society's goal as a religious body, with a chastity vow, a Superior, one legislative corpus and a council.

The second chapter describes the special vow of obedience to the Pope.

The third chapter explains the implications of the vow of obedience.

The fourth chapter explains the vow of poverty, especially relevant insofar as it declares that the Society, as a legal entity, cannot accept regular income.

One exception is made, however, for the Colleges whose members study; these are governed separately.

The fifth chapter explains the way of life proper to the Society: without choir, imposed penitences that can limit the ability to attend the ministries and admission to the Society. This chapter also highlights that only those who have been thoroughly examined and tested can be admitted as members.

In the context of the 16th century Catholic Church, the *Formula of the Institute* was quite disruptive (O'Malley 1993). Although it was approved, that did not occur without contestation from several important members of the Catholic Church's hierarchy. The main problems the critics encountered in the *Formula of the Institute* were the special vow to the Pope, considered superfluous, the absence of the

The Organising Principles of the Society of Jesus traditional liturgical practices, such as regular singing in a choir, and the elimination of regular penitential practices. The latter gained especial relevance since this norm, being close to Protestant principles, could be used by the Lutherans in particular to sustain their critiques against the Catholic Church.

The *Formula of the Institute* is inspired in some points by the Exercises, mainly the Meditations on the Kingdom and on the Two Banners³³. However, a possible relation between the individual stance and the entity level should not be sought in this document, as that does not seem to have been the intention of Ignatius. The *Formula of the Institute* is only directly related to the Constitutions (§637–653) because it enumerates the ministries that characterise the Society, *id est*, it declares what the Society should do as a Religious Order. The first group of ministries entails spiritual ministries: public lecturing on the word of God; the teaching of sacred matters and all that is related to the word of God; the direction of Exercises; the teaching of the Christian doctrine to children and the ignorant; hearing confessions; the administration of Sacraments. The second group of ministries is related to all charity works, such as reconciling those that are not in harmony, visiting hospitals and prisons. The second group of ministries is not compulsory for the members of the Society. They merely state the kind of work the first members of the Society did. However, the first group of ministries clearly specifies the means by which the Society attempts to achieve its foundational purpose.

³³ These are two of the most famous meditations on the Spiritual Exercises, bearing a clear military character insofar as they invite the individual to choose between one of two “battle fields”: Jesus Christ’s or the Devil’s.

As is by now apparent, the Society has a set of organisational documents that detail all the aspects of its characteristic way of life. Although other Religious Orders have produced organisational documents with several rules on daily life, the documental apparatuses of the Society is unique and aligned with the declared mission and ministries. The fact that the Society put so much effort into the normalisation of its way of life, without, as will be clear by the end of this chapter, compromising individual liberty, is of utmost importance to understanding the set of governance mechanisms which endeavoured to conduct the organisation. In order that the governance mechanisms may be understood, it is important to understand the reasons behind their setting up. For this reason, the following section will analyse the Constitutions.

8.3 The Constitutions of the Society

This section analyses the Constitutions of the Society³⁴. The Constitutions were written by Ignatius with the help of Father Polanco, who was his personal secretary (Aldama 1989; O'Malley 1993). Given the relevance of this organisational text to an understanding of what the Society is, as a Religious Order, and of how it is structured, an analysis of all the ten parts that form the Constitutions will be made hereafter.

The Constitutions comprise four books:

³⁴ All the citations taken from the Constitutions are based on Padberg's edition: Ibid. Jose Bento da Silva

1. The General Examen.
2. The Declarations on the General Examen.
3. The Constitutions of the Society, divided into ten chapters.
4. The Declarations on the Constitutions.

The Declarations either on the General Examen or on the Constitutions are explanations of what is stated in the Constitutions. This explanation is made in every number of the Constitutions. The Constitutions are the fundamental rule of the Society, binding its members in juridical terms according to the Catholic Church's Canon Law, which means that the Constitutions have legislative power.

Every Religious Order has a text with this character. As discussed earlier, several Rules were in use by the time Ignatius founded the Society. The influence of these rules in the Constitutions has been extensively researched (Hsü 1971; Aldama 1989), but will not be addressed extensively because it is beyond the scope of this research. The Constitutions will be analysed in terms of their legislative influence in the governance of the Society. All the aspects that concern the government of the Society are fully declared in the Constitutions. The fact that the Constitutions cannot be changed³⁵ in their fundamental text, but that the Declarations can be updated by a Congregation, calls attention to the relevance of these texts in understanding the governance mechanisms of the Society and their inner charisma.

³⁵ The Constitutions were approved by GC 1, in 1558, and the unalterable character was reinforced by GC 3, decree 23, in 1573, GC 27, decree 14, in 1923, and GC 31, decree 4 in 1965-1966.

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The first, and probably one of the most important, aspects to consider when approaching the Constitutions is their structure. In accordance with a modern way of charting thought (Ong 2004), the Constitutions follow a determined order in the presentation of the subject matters (Coupeau 2010). That order is based on practical considerations, which means that the aim of the Constitutions, which is the proper governance of the entity, is only stated in the final chapters, numbers nine and ten, entitled respectively “*Governance of the Society*” and “*The Preservation and Increase of the Society*”. The Constitutions can and should be analysed according to this rationality, and bearing in mind that the aim of this legislative text is to fully regulate the governance of its members aligned with their characteristic way of missioning. This is the first major difference between the Constitutions and previous Rules; the missioning that is proper of any member of the Society is based on the assumption that all of its members are fully available to go to any part in the world: “*the members of this Society ought to be ready at any hour to go to any part of the world where they may be sent by the sovereign pontiff or their own superiors*” (§588). This availability was, at the time, quite unusual because life in the monasteries was characterised precisely by stability: a monk would enter a monastery and, most probably, spend his entire life in that monastery.

The Constitutions were written to assure the proper government of its members, determining how to select and train them, and how to select those who should govern the entity. In this sense, the Constitutions mark a clear shift as regards what concerns previous Rules. The Rules of other Religious Orders were, by the 16th century, focused mainly on ordinances (Aldama 1989) which detailed extensively what

The Organising Principles of the Society of Jesus should be done and at what time of the day, for example. The Constitutions do not extensively detail issues regarding the practice of everyday life precisely because of the need for flexibility and adaptability to different geographical locations. The Constitutions are therefore to be approached enlightened by the need for moderation: *“Moderation in spiritual and bodily labours and the middle tenor of the Constitutions, which do not lean toward an extreme of rigor or toward excessive laxity (and thus they can be better observed), will help this whole body to persevere and maintain itself in its well-being”* (§822).

The Constitutions, being always concerned with the resilience of the entity, take into consideration two dimensions of the entity that Ignatius considered fundamental:

1. How to properly shape the members of the entity. In the Constitutions, the shaping of the members of the Society is treated in the General Examen and in Chapters One through to Five.
2. How to properly govern the entity. In the Constitutions the government of the entity is treated in Chapters Eight through to Ten.

The two chapters in between, Chapters Six and Seven, treat, respectively, the characteristics of religious life and of apostolic life. Religious life is understood as being subjected to the vows of chastity, obedience and poverty. There are substantial differences between the Society and previous Religious Orders in terms of the understanding of how one should live a proper religious life. Apostolic life is concerned with the specific missions a member of the Society has. Again, the Society

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The Organising Principles of the Society of Jesus distinguishes itself from other Religious Orders in the type of with which mission it is engaged. Both the religious way of life and the apostolic missions were the cause for great concern inside the Catholic Church due to its revolutionary character (O'Malley 1993). However, this present section will not address these issues here as they will be treated in the critical discussion chapter. The following chapters will analyse the Constitutions according to its original division, starting with the chapters that treat dimensions related to the conduct of individuals, and ending with the chapters concerned with the conduct of the “*Corpus*”.

8.4 The government of individuals

8.4.1 The General Examine

The Constitutions start with the General Examen, which is intended to evaluate the ability of a candidate to join the Society. The need to test a candidate was not new, and previous Rules took care of this issue. The Rule of Pachomius³⁶, the Rule of Cassian³⁷, the Rule of Saint Benedict³⁸ and the Constitutions of Saint Dominic³⁹ all stress the importance of examining the candidates for a life in the monastery. However, these Rules examine a candidate asking him to show that he really wishes to join the monastery. As an example, Cassian tested his candidates by asking them to wait for ten days at the door of the monastery. These examination mechanisms

³⁶ Number 49.

³⁷ John Cassian’s Conlationes, Chapter 21, Number 1

³⁸ Chapter 58

³⁹ Part 1, chapter 13

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aimed at testing the capability of the candidate to undertake a life of asceticism (Aldama 1989).

The General Examen of the Constitutions is quite different from the former evaluation mechanisms, insofar as it does not examine the propensity for asceticism, but the personal characteristics of the candidate and their alignment with the grades of incorporation into the entity⁴⁰.

The General Examen starts by presenting the Society to the candidate, especially as regards those issues in which the Society is distinct from other Religious Orders. The Society presented, when it was founded, several characteristics that not only made it distinct, but also resulted in some resistance inside the Catholic Church (O'Malley 1993). The main distinctive characteristics of the Society were:

1. Its name, because it used the word "Jesus", which was not common and needed approval from the Catholic Church.
2. Its mission, which was directed towards the salvation of others and not only of the members of the Society. In other Religious Orders the main reason to join was, by force of the entity's nature, one's own salvation and sanctification. In the Society, the salvation of other people is not secondary but its primary focus, and the reason for its existence.

⁴⁰ The grades of incorporation into the Society will be explained later in the present chapter.

3. The vow of poverty, which has some peculiarities. As was common in other Religious Orders, the members of the Society cannot have any possessions. However, there is something distinct in the Society's way of living poverty: only the houses where members in training live, commonly known as Colleges, can have regular sources of income. The houses destined to Professed members cannot have either regular sources of income, or accept stipends.
4. The fourth vow of obedience to the Pope. This is probably one of the most distinctive aspects of the Society, and also one that raised more resistance in the Catholic Church. The vow of obedience to the Pope means that the Society, and therefore all its Professed members, must accept any request from the Pope for missions that he considers to be relevant, which puts the Society directly dependent on the Papacy.
5. The external way of living. The members of the Society differ from other Religious Orders' members because they must dress like the people of the region where they are living, must not attend regular choirs (as is common in most Religious Orders) and should not practise either regular forms of penance, or extreme forms of austerities such as long fasting. In a word, the Society clearly distinguished itself from monastic forms of life.
6. The candidates to the Society are admitted to different grades of membership.

7. Last but not least, the training period of a member of the Society is extremely long when compared to that in all other Religious Orders in the 16th century. To the present day, the time spent training a Professed member of the Society is unique among the Catholic Church's religious organisations.

After presenting the Society to the candidate, the General Examen proceeds to inform the candidate of the reasons that might lead to the refusal of his application. The main reasons not to accept a candidate for membership in the Society (at this moment, the candidate is not entering the Society in a strict sense, but is trying to be admitted for the noviciate), concerned the perfection of his life in terms of faith and moral conduct. Other Religious Orders used to accept for membership those who had committed crimes, but showed repentance. Given the fact that the Society's main mission is not the members' own salvation but the salvation of others, accepting people who might not be able to convince others due to their previous life would not be allowed.

Besides moral and faith related reasons, the Constitutions state that someone who presents some sort of health issues should not be admitted: *“Has he had or does he have any illnesses, concealed or manifest, and what is their nature? Especially, he should be asked whether he has any stomach trouble or headaches or trouble from any other congenital impediment or defect in some part of his body. This should be not only asked but subjected to examination so far as possible”* (§44). According to Aldama (1989), one of the sorts of illness that Ignatius was referring to in this passage of the Constitutions was mental health issues. The reason for examining the

health condition of the candidate is the need to be available, as a member of the Society, to go anywhere in the world, which depended on good health due to the hazards associated with long sea journeys, where the missionaries died frequently before reaching their destination (Clossey 2008).

After presenting the main characteristics of the Society and assessing if there are causes for refusing the candidate, the General Examen proceeds towards the examination of two issues:

1. Examining the candidate's determination to be a member of the Society.
2. Examining particular aspects of the candidate in order to determine his fitness for one of the grades of membership of the Society.

The examination of particular aspects of the candidate is mainly concerned with his capability to undergo a long period of training, especially academic training:

“So that better knowledge and understanding of these candidates may be gained, these questions should be put to each one. Where did he study? In which faculty? What authors and what doctrine? How long? In his own opinion, how has he progressed? And especially, what facility has he in the Latin language? Has he received a degree in the liberal arts, or in theology, or canon law, or another faculty?”

Does he think he has a memory to grasp and retain what he studies? Does he think that his intellect enables him to penetrate quickly and well what he studies? Does he find in himself a natural or voluntary inclination to studies?

Does he think that the study was injurious to his bodily health? Does he feel that he has the spiritual and bodily strength to bear the labours required in the Society, whether it be in studies during their time or in the Lord's vineyard when the time comes to work in it?" (§104 - §107)

The General Examen deals, therefore, with the need for uniformity⁴¹, which the Society believes to be essential to accomplish its mission. So that the candidate is not misled and the examiner can be sure to be admitting someone capable of becoming a member of the Society, a complete list of questions is undertaken covering the candidate's determination, which should be stronger after knowing the main characteristics of the entity, his conduct background, his health and his intellectual capabilities. However, besides these questions the General Examen also informs the candidates about two important dimensions of the Society.

First, the candidate must accept that his conduct might be corrected as a consequence of his membership: *"For the sake of his greater progress in the spiritual life, and especially for his greater lowliness and humility, he should be asked whether he will be willing to have all his errors and defects, and anything else which will be noticed or known about him, manifested to his superiors by anyone who knows them outside*

⁴¹ *"This is done so that both sides may proceed with greater clarity and knowledge in our Lord, and also that the more the subject's constancy has been tested, the more stable and firm they may be in the divine service and in their original vocation, for the glory and honor of his Divine Majesty."* (§18)

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of confession; and further, whether he along with all the others will be willing to aid in correcting and being corrected, and to manifest one another with due love and charity, in order to help one another more in the spiritual life, especially when this will be requested of him by the superior who has charge of them for the greater glory of God.” (§63) This practice, which is known as Fraternal Correction, is typical of the Society, and is of great importance. The practice of Fraternal Correction means that any member of the Society can correct the behaviour of another member, either in private or in the presence of other members of the Society. There are two types of Fraternal Correction: the first type is regular, and involves the entire community; the second type has no specific regularity, and occurs whenever a member feels that he ought to correct someone. Every member of the Society, independently of his grade of membership or hierarchical position, is obliged to accept a request to be submitted to a Fraternal Correction. This practice was heavily contested in the Society due to possible damages in personal reputation. Because of the amount of internal resistance, the 6th Congregation declared that any member of the Society renounces to his personal reputation (GC 6, d. 32). Aldama (1989, p. 49), when reflecting on the nature of Fraternal Correction, attributes to this practice the sustainability of the Society as a social entity.

The second dimension of the Society that the General Examen deals with is the relevance of the experiences that any member must undertake. These experiences, known as the Six Principal Experiences, are outlined thus:

1. *“The first experience consists in making the Spiritual Exercises for one month.”* (§65)

2. *“The second experience is to serve for another month in hospitals.”* (§66)

3. *“The third experience is to spend another month in making a pilgrimage without money, but begging from door to door at times.”* (§67)

4. *“The fourth experience consists in the candidate employing himself, after entrance into the house, with all diligence and care in various low and humble offices, while giving a good example of himself in all of them.”* (§68)

5. *“The fifth experience is that of explaining the Christian doctrine or a part of it in public to boys and other simple persons.”* (§69)

6. *“In a sixth experience the candidate, who now has been tested and found edifying, will proceed further by preaching or hearing confessions, or in both together, in accordance with the times, places, and capacity of each.”* (§70)

The Six Principal Experiences are related to the reason for the existence of the Society, insofar as they resemble the same experiences that the founder undertook, and because these experiences are directed towards the training of the individual in qualities that will make him better suit a life of hardship, destined largely to help others save their souls. Besides training the member of the Society in the “way of

life” proper to the entity, these experiences are an evaluation mechanism of the qualities of each individual. Every member of the Society is obliged to undertake these experiences. However, given the implications in terms of availability of time to practise some of these experiences, the first three are only undertaken during the noviciate or during the final part of training, known as the Third Probation.

In the final part of the General Examen, the candidate is confronted with one of the most innovative aspects of the Society (Aldama 1989): the Account of Conscience. The obligation to give an Account of Conscience has no similarity with any other religious practices of the Western Christian world, and therefore it seems that it was Ignatius who, probably with the help of Father Polanco⁴², created this practice. The Constitutions are clear on the reasons for the creation of the Account of Conscience by Ignatius:

“After pondering the matter in our Lord, we consider it to be of great and even extraordinary importance in his Divine Majesty that the superiors should have a complete understanding of the subjects, that by means of this knowledge they may be able to direct and govern them better; and while caring for them guide them better into the paths of the Lord.

Likewise, the more thoroughly they are aware of the interior and exterior affairs of their subjects, with so much greater diligence, love, and care will they be able to help the subjects and to guard their souls from the various difficulties and dangers which might occur later on. Later, in conformity with our profession and manner of

⁴² I thank the historian Father John O’Malley for this insight, given in an interview I conducted with him.

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proceeding, we must always be ready to travel about in various parts of the world, on all occasions when the supreme pontiff or our immediate superior orders us. Therefore, to proceed without error in such missions, or in sending some persons and not others, or some for one task and others for different ones, it is not only highly but even supremely important that the superior have complete knowledge of the inclinations and motions of those who are in his charge, and to what defects or sins they have been or are more moved and inclined; so that thus he may direct them better, without placing them beyond the measure of their capacity in dangers or labours greater than they could in our Lord endure with a spirit of love; and also so that the superior, while keeping to himself what he learns in secret, may be better able to organize and arrange what is expedient for the whole body of the Society.” (§91-§92)

The lengthy citation above helps understand the main reason for the creation of the practice of the Account of Conscience; a thorough knowledge of an individual is relevant to the correct governance of both the individual and the entity. The fact that the Account of Conscience is used for the governance of the Society is precisely what distinguishes this practice from previous practices used for the direction of conscience, envisaged by Cassian and Saint Benedict. However, there is a significant difference between former manifestations of conscience and the Society's Account of Conscience; whereas manifestations of conscience were made to a director of conscience with the objective of helping the individual meliorate his inner life through the manifestation of his inner truth, the Account of Conscience is made to the Superior so that he better governs the entity. Another important characteristic of

the Account of Conscience that did not exist in the previous forms of manifestation of conscience is that it is regular: every member of the Society must give an Account of Conscience every year. Previous forms of manifestation of the individual's conscience had no regularity, as they only occurred when the individual was in need of interior guidance, or as a preparation for the Confession.

It is important that the differences between the manifestation of conscience, the Account of Conscience and the practice of Confession are made clear. Foucault (2009) when defining Pastoral power, refers to the practices of manifesting one's conscience and to the practice of confessing one's sins. However, Foucault does not mention, as far as the context of the present research is concerned, the practice of Account of Conscience. In that sense, given the relevance of the Account of Conscience for the Society and its singularity, it seems crucial to clarify the differences between these three practices so that a clearer understanding of the way Pastoral power is deployed can be attained.

The manifestation of the individual conscience is used to secure the Pastor's guidance in spiritual life. This means that the manifestation of conscience is a spiritual practice which is at the cornerstone of Pastoral power, as understood by Foucault (2009). All the movements of the soul, such as temptations, are manifested to the director of conscience, the Pastor, so that he can use this inner truth to better conduct the individual towards the salvation of his soul. Traditionally, the Pastor was either the Abbot of the monastery, or the priest responsible for the parish to which the individual belonged.

The practice of Confession is used to manifest the personal sins and obtain total forgiveness. In the Catholic Church's tradition, the practice of Confession is the main mechanism to achieving forgiveness for the sins, and it presupposes repentance. It is clear, therefore, that the practice of Confession and the manifestation of conscience are quite distinct. However, given the fact that these two practices assume a personal interaction with the Pastor, it is common to confuse them and to even practise them together within the same conversation.

The practice of the Account of Conscience is quite distinct because it is not related exclusively to the spiritual movements of the soul, and is not to be given to the director of conscience but to the Superior. As a practice, the Account of Conscience is given to the Provincial who is not the director of conscience or the confessor, as was the case in monastic and mendicant Religious Orders. However, the Account of Conscience deals with inner movements and truths, but of a different nature. The inner movements and truths to be dealt with in the context of the Account of Conscience are related to the individual mission of each member of the Society and with his desires. In this sense, the building of a "space of desire" as Certeau (1973) has defined it, is of utmost importance in understanding the relevance of the Account of Conscience. This issue will be clarified in the critical discussion chapter.

These three practices, of manifestation of conscience, Confession and the Account of Conscience, imply secrecy. This means that everything that is said to either the Pastor, the director of conscience, or, in the case of the Account of Conscience, to the

Superior, may not be revealed to anyone. However, although the information cannot be revealed, it can be used. The conjugation of secrecy with the possibility of usage justifies the high centralization of the Society; the Superior General knows more because he was informed by all the Provincials through correspondence, who, in their turn, were informed by all the members of their Province through the same practice, together with the Account of Conscience.

The practice of the Account of Conscience is of such relevance that it required several declarations throughout the history of the Society precisely to define it as being contrasted with a manifestation of conscience and with the Confession of sins. Ignatius had gathered theological support for this practice by the time he introduced it; later, in 1594, the 5th Congregation manifested the relevance of this practice for the government of the Society (GC 5, d. 58); at the beginning of the 20th century, the Superior General Ledóchowski asked Pope Pius XI to especially declare that this practice was in accordance with the Code of Canon Law (Aldama 1989, p. 60). Knowles (1966) also refers to this practice and points out the fact that other Religious Orders tried to replicate it, though without success.

8.4.2 Incorporation into the Society

After the General Examen, the Constitutions deal with the admission to the Society (Chapter 1), the dismissal of members (Chapter 2), the probation of novices (Chapter 3), the formation of scholastics (Chapter 4) and the incorporation into the Society

(Chapter 5). The remainder of this section will analyse briefly Chapters 1 through to 4, and Chapter 5 will be addressed in a separate section.

Strictly speaking, the authority to admit anyone to the Society is conferred to the Superior General. In practice, the Superior General delegates this authority to the Provincials (§138). Ignatius always wanted to make admission to the Society extremely difficult. This difficulty in joining the Society posed some problems when it experienced a significant growth in the number of its members (Alden 1996). As previously stated, only the Professed members of the Society can be elected Superiors. Therefore, given the extremely long training period, there were periods in the history of the Society in which the number of members in training by far exceeded the number of Professed members. The consequent ease of admitting people to the Society led to disciplinary problems, especially with the Portuguese Province (Alden 1996). Following this, Ignatius is quite clear: *“Both the one who has the authority to admit and his helper ought to know the Society well and be zealous for its good functioning, so that no other consideration will be able to deter him from what he judges in our Lord to be more suitable for his divine service in this Society. Therefore he should be very moderate in his desire to admit.”* (§143)

After clarifying the need to be strict in the selection of candidates, the Constitutions detail the qualities required for admission. These qualities depend on the possible degree of incorporation one is destined for after the General Examen. Therefore, those who are admitted to become Temporal Coadjutors do not need to demonstrate intellectual qualities: *“under the presupposition that they should not be more*

*numerous than is necessary to aid the Society in occupations which the other members could not fulfil without detriment to the greater service of God, they ought to be men of good conscience, peaceful, docile, lovers of virtue and perfection, inclined to devotion, edifying for those inside and outside the house, content with the lot of Martha in the Society, well-disposed towards its Institute, and eager to help it.” (§148). The Temporal Coadjutors were the equivalent to the lay brotherhood, introduced by the Cistercians, and commonly known also as “*mercenarii*”, “*monachi laici*”, “*monarchi barbati*” or “*conversi*” (Knowles 1966), and used mainly to help the monks with the daily activities of the Monastery.*

For those who admitted to the spiritual ministry⁴³, the number of qualities is more detailed and extensive. There are two sets of qualities in the Constitutions for the admission to spiritual ministry: intellectual and external. Intellectual qualities pertain to the capability of the member to undertake a long period of academic formation, which typically implies studies in philosophy and theology (§154)⁴⁴, and his capability to memorise matters (§155). The external qualities pertain to behavioural characteristics, such as the strength of his will (§156), capability to speak in public, (§157), the physical appearance⁴⁵ (§158), and his health condition, either physical or

⁴³ Spiritual ministry is reserved for those who will be ordained Priests and can, should they prove themselves valuable, become Professed members.

⁴⁴ This means that to this day a member of the Society has two degrees, with very few exceptions to this “rule”. Given the fact that many members join the organization late in their lives, it is not difficult to find people who have three degrees.

⁴⁵ “*In regard to the exterior, a lack of bodily integrity, illnesses and weakness, or notable ugliness.*” (§185)

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The main source of concern when listing the qualities required to become a member of the Society is uniformity. Those who are admitted to the Society should present similar qualities that make the subjects more manageable, so that they can conduct themselves in accordance with the “way of proceeding” characteristic of those who are Professed. Lack of uniformity at the moment of selection will make the uniformity of the Professed more difficult, if not impossible.

The second chapter of the Constitutions is relevant for two reasons: on the one hand, in the 16th century no other Religious Order had a chapter on its rules dedicated to the dismissal of its members (Aldama 1989); on the other hand, the dismissal of members is closely related to the degree of incorporation of a member. The higher the degree of incorporation of a member, the more difficult it is to dismiss him. This

⁴⁶ *“Another impediment is to be mentally ill, with the result that the judgment becomes obscured and unsound, or to have a notable disposition toward such illness.”* (§175)

means that the novices can be dismissed quite easily, but a Scholastic can only be dismissed by the Superior General. As for the Professed members, the possibility of dismissal is extraordinary, and needs to be thoroughly grounded.

There are three broad reasons to dismiss a member: incorrigibility of behaviour⁴⁷, incompetence⁴⁸, scandal⁴⁹ and a lack of capability to align himself with the entity. The latter is especially relevant insofar as it is related to what is expected of a Professed member: “(...) *is unable to bring himself to live under obedience and to adapt himself to the Society’s **manner of proceeding** [emphasis added], because he is unable or unwilling to submit his own judgment, or because he has other hindrances arising from nature or habits.*” (§216)

After dealing with the admission to and dismissal of candidates to the Society, the Constitutions deal with the training of members in Chapters Three and Four.

Chapter Three deals with the training of novices along two dimensions: how to make progress in what concerns the soul, and how to preserve the body: “*toward enabling them to make progress both in spirit and in virtues along the path of the divine service, in such a manner that care is also taken of the health and bodily strength*”

⁴⁷ “(...) *because this person is judged to be incorrigible in some passions or vices (...).*” (§210)

⁴⁸ “(...) *because of his notable incompetency for any task whatever (...).*” (§212)

⁴⁹ “*The more serious and culpable these are, the less ought they to be tolerated, even if they might not scandalize others because they are occult.*” (§210)

necessary to labour in the Lord's vineyard. Consequently what pertains to the soul will be treated first and then what pertains to the body.” (§243)

The first aspect the Constitutions address regarding training is seclusion, considered fundamental to start caring for the soul. During the two years' duration of the noviciate, the novices are supposed to live in seclusion, being forbidden to communicate unless with members of the Society: *“In regard to the soul, it is of great importance to keep those who are in probation away from all imperfections and from whatever can impede their greater spiritual progress. For this purpose it is highly expedient that they should cease from all communication by conversation and letters with persons who may dampen their resolves.” (§244)* This means that the members of the Society that live in the house where the noviciate functions must be carefully chosen, so that the novices can learn by example. As for seclusion, this was a practice already common to existing Religious Orders. However, the latter treated extreme forms of seclusion, which implied the complete retreat from the world, as the most perfect form of religious life, resembling the one conducted by primitive anchorites. According to this understanding, the monk would start by living a cenobitical form of life so that he could later aspire to an anchorite form of life, even inside the Monastery (Lawrence 2001). For Ignatius, the initial two of seclusion only served the purpose of training the candidate in matters related to the soul, helping him to conduct his own spiritual life. Seclusion is not understood by Ignatius as something that the Jesuit might aspire to, insofar as he is always supposed to carry out his mission in the midst of the secular world.

Assuming seclusion and silence (§249) as guidelines, the Constitutions move toward the instruction of the novices. The first dimension in the instruction of novices is the “*special care to guard with great diligence the gates of their senses (especially the eyes, ears, and tongue) from all disorder*” (§250). The second dimension in the instruction of the novices is “*to preserve themselves in peace and true humility of their souls*” (§250). One aspect that should be noted is the assumption that interior progress must be evaluable through exterior signs, such as “*the modesty of their countenance, the maturity of their walk, and all their movements*” (§250).

All the exterior practices envisaged for the training of the novices are therefore directed at the progression of their soul. However, the progression of their soul is also made accountable through their behaviour, which must be modest and humble. Practices of seclusion and guarding the senses are aimed at the progression of one’s soul: “*All should take special care to guard with great diligence the **gates** [emphasis added] of their senses, especially the eyes, ears, and tongue.*” (§250) The first step in the protection of one’s soul is taken by protecting the senses, which are the gate through which many sources of temptations from the outer world enter.

Care must also be taken in respect to the formation of the interior man, through three practices: dispossession of property⁵⁰, spiritual combat⁵¹ and spiritual direction. Spiritual direction is based upon the regular reception of the Sacraments (attendance

⁵⁰ “So that they may begin to experience the virtue of holy poverty, all should be taught that they must not have the use of anything as their own.” (§254)

⁵¹ “They should be taught how to guard themselves from the illusions of the devil in their devotions and how to defend themselves from all temptations.” (§260)

at Mass and Confession), and the daily examination of conscience. The Examine of Conscience underpins the sacrament of Confession. The Constitutions are clear as regards the need for the spiritual director to know everything, so that in the case where someone needs to confess his sins to a Priest other than his confessor he must, later on, reveal the contents of that confession to his spiritual director: *“Moreover, one who confesses to another than to his ordinary confessor ought later to open his whole conscience to his own confessor, as far as he remembers, so that he, being ignorant of nothing which pertains to it, may the better aid him in our Lord.”* (§278)

In what pertains to the novices, their confessor must be the Master of Novices, who is responsible for the conduction of their souls and their training while they are in the noviciate: *“It will be beneficial to have a faithful and competent person to instruct and teach the novices how to conduct themselves inwardly and outwardly, to encourage them to this, to remind them of it, and to give them loving admonition; a person whom all those who are in probation may love and to whom they may have recourse in their temptations and open themselves with confidence, hoping to receive from him in our Lord counsel and aid in everything. They should be advised, too, that they ought not to keep secret any temptation which they do not tell to him or to their confessor or to the superior, being happy to have their entire soul completely open to him. Moreover, they will tell him not only their defects but also their penances or mortifications, or their devotions and all their virtues, with a pure desire to be directed if in anything they have gone astray, and not wishing to be guided by their own judgment unless it is in agreement with the opinion of him whom they have in place of Christ our Lord.”* (§263) The Master of Novices must therefore train the

novices in their conduct, counselling them and helping them in all they might need in order to progress.

Specific practices are deployed to foster spiritual progression. Two are worth noting: the practice of treating one's faults by their opposites, and the practice of correcting one's faults. Treating one's faults by their opposites, although relevant to the spiritual progression, is referred to briefly in the Constitutions: "*Temptations ought to be guarded against by their opposites, for example, if someone is seen to be inclined to pride, by exercising him in lowly matters deemed helpful for humbling him; and similarly of other evil inclinations.*" (§265) The style of this paragraph is typically Ignatian insofar as it leaves to the judgment of the person responsible for the conduct of one's soul the choosing of the best means to achieve the end aimed at (Aldama 1989). As far as corrections are concerned, the style used in the text of the Constitutions is also Ignatian: "*The procedure to be followed in corrections and penances will be left to the discreet charity of the superior and of those whom he may delegate in his place, who will measure them in accord with the disposition of persons and with general and individual edification (...).*" (§269) Ignatius envisaged three levels of correction: the first level of correction is not to be severe, because it is to be applied when the fault in question is committed for the first time; the second level of correction, more severe, is to be applied the second time the fault is committed in such a way that the subject feels himself humiliated; the third level of correction, which is to be applied once the fault has been committed for the third time, is supposed to be severe and to induce fear (§270).

All these practices deployed during the Noviciate, together with the above-mentioned six fundamental experiences, have two purposes: the preservation of one's health, since the practices must not put in question the good condition of the body⁵², and indifference.

Indifference of the subject is by far one of the most important themes for Ignatius, if not the most important. Indifference is addressed both in the Constitutions and in the Exercises, as will be clarified subsequently in this chapter. Indifference relates to the availability of the subject to undertake any mission given to him: *“Each one ought to be ready to undertake whatever employment may be assigned to him”* (§302), because *“the aim and end of this Society is, by traveling through the various parts of the world at the order of the supreme vicar of Christ our Lord or of the superior of the Society itself, to preach, hear confessions, and use all the other means it can with the grace of God to help souls.”* (§308) Indifference is supposed to be the result of the long training period of the members of the Society, and is directly related to the way the Society has chosen to move forward with its mission: *“Consequently it has seemed to us necessary, or at least highly expedient, that those who will enter the Society be persons of good life and sufficient learning for the aforementioned work. However, those who are both good and learned are relatively few; and even among these few, most are already seeking rest from their labours. We have thus found it a*

⁵² *“Just as an excessive preoccupation with the needs of the body is blameworthy, so too a proper concern for the preservation of one's health and bodily strength for the divine service is praiseworthy and should be exercised by all. Consequently, when they perceive that something is harmful to them or that something else is necessary in regard to their diet, clothing, living quarters, office, or occupation, and similarly of other matters, all ought to give notice of this to the superior or to the one whom he appoints.”* (§292)

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quite difficult matter to increase the numbers of this Society with such good and learned men, in view of the great labours and the great abnegation of self which are required in the Society. Therefore all of us, desiring to preserve and increase the Society for the greater glory and service of God our Lord, have thought it wise to take another path, that of admitting young men whose good habits of life and talent give hope that they will become both virtuous and learned in order to labour in the vineyard of Christ our Lord. We shall likewise accept colleges under the conditions stated in the apostolic bull, whether these colleges are within universities or outside of them; and, if they are within universities, whether these universities are governed by the Society or not. For we are convinced in our Lord that in this way greater service will be given to his Divine Majesty, with those who will be employed in that service being multiplied in number and making progress in learning and virtues.” (§308) The selection of candidates, the training mechanisms deployed at the noviciate and the rest of the mechanisms to train the members of the Society take care of the need for indifference, so that the entity may not only conduct the individual behaviour, but also assign him whatever mission the Superior finds most needed.

Chapter Four of the Constitutions deals with the training of those that finished their noviciate successfully. The members of the Society that are in academic training before they are ordained Priests are known as Scholastics. The Constitutions extensively address the need for the establishment of special physical places where the Scholastics should live: the Colleges. In this sense, the word “Colleges” has two meanings in the context of the Society: there are Colleges for the training of its

Scholastics, and there are Colleges that accept students that are not members of the Society. The fact that the Colleges where the members of the Society studied started accepting external students led to an increase in the number of Colleges and to the establishment of a ministry that had not previously been envisaged by Ignatius (O'Malley 1993).

In the context of the Society as a Religious Order, it is important to notice that the establishment of Colleges and Universities is something that emerges naturally, given the nature of its mission: *“The end steadfastly pursued by the Society is to aid its own members and their neighbours in attaining the ultimate end for which they were created. For this, in addition to the example of one’s life, learning and skill in expounding it are required. Hence, once the proper foundation of abnegation of themselves and the needed progress in virtues is seen to be present in the new members, it will be necessary to provide for the edifice of learning, and of skill in employing it, so as to help make God our Creator and Lord better known and served. For this, the Society undertakes colleges as well as some universities, where those who prove themselves worthy in the houses but have entered the Society unequipped with the necessary learning may be instructed therein and in the other means of helping souls.”* (§307)

Just as in the noviciate, the Constitutions also deal with which practices are to be undertaken by the Scholastics. The difference between the practices of a Novice and the practices of a Scholastic are significant. The Constitutions treat the formation of

Scholastics along three dimensions: spiritual progression and health maintenance, intellectual formation and pastoral training.

Health maintenance is touched upon only briefly, but represent a good example of what most deeply characterises Ignatian spirituality: *“special attention should be given to their abstaining from studies at times inopportune for bodily health, to their taking sufficient sleep, and to their observance of moderation in mental labours so as to be able to keep at them longer both during their studies and later on when using what they have studied for the glory of God our Lord.”* (§339)

Spiritual progression must be assured through practices that do not put in question the intellectual progression of the Scholastic. Although this might not seem relevant, in the 16th century the focus on the intellectual training of the Scholastics to the detriment of spiritual practices was a novelty, one which caused great opposition in the Catholic Church (Aldama 1989; O'Malley 1993). The Society abandoned most of the monastic practices in use, using only those that Ignatius believed to be conducive to a more perfect spiritual life as long as they did not compromise the mission of the Society. Therefore, the refusal of Ignatius to incorporate previous monastic practices does not represent any kind of opposition to the monastic way of life, for which he had great admiration, but is linked to the way the entity is to be organised, given a mission that is to be undertaken globally. That is why the Society does not adopt common practices of monastic life, especially the choir, the communal prayers, the night prayers, and the regular penances. The Scholastic is supposed to pray for no

more than an hour a day. This hour is divided in two examinations of conscience, of fifteen minutes each, and half an hour of intellectual praying (§342).

This does not mean that a member of the Society lacks a spiritual life. Indeed, what should characterise the spiritual life of any member of the Society is the capability to seek God in all things and at every moment of his life. The difficulty in achieving such a spiritual state is the main reason behind the length of the noviciate, which takes two years⁵³.

Until the Scholastic is ordained a priest he must have a humanistic, philosophical and theological academic training, which must be the main concern during this period. In terms of intellectual training, the Constitutions take special care of one practice: the disputation. This practice is associated with the discussion of specific subjects and the treatment of case studies, which Ignatius institutionalised in the Society after his experience with this pedagogical method at the University of Paris (O'Malley 1993; Lécrivain 2011). The discussion of case studies concerning theology, philosophy and ethics served not only to actively train the Scholastic, but to prepare him for pastoral activity, which should be centred in conversations with people and preaching: *“Similarly, they will exercise themselves in preaching and delivering [sacred] lectures in a manner suited to the edification of the people, which is different from the scholastic manner; they should strive to learn the **vernacular language** [emphasis added] well, to have prepared and have ready at hand the topics most useful for this ministry, and to avail themselves of all appropriate means to perform*

⁵³ The Society is the only Religious Order to have a noviciate of two years. All the other Religious Orders have a noviciate of one year.

The Organising Principles of the Society of Jesus *it better and with greater fruit for souls.*” (§402) The care for practising preaching and lecturing through case studies, along with the need to “learn the vernacular language” of the place where the Scholastic lives, is perfectly aligned with a life of no fixed residence and with the availability, supported by indifference, to go anywhere in the world. This form of indifference must characterise the highest form of integration into the Society, known as Professed, as will be illustrated in the following paragraphs.

8.4.3 Membership of the Society

Chapter Five of the Constitutions deals with the “*Admission of incorporation into the Society*”⁵⁴. The Society is characterised by the fact that its members have different levels of incorporation, meaning that not everyone has the same degree of membership. The highest level of incorporation into the Society is the Professed of four vows⁵⁵. Whenever the organisational texts refer to the Society, they are referring to the Professed Society. The Professed level is the most important, since only members with this level of membership can be elected to govern the Society: “*The reason is, not that the body of the Society contains no other members, but that the professed are the principal members, some of whom, as will be explained later, have active and passive voice in the election of the superior general and in other such matters.*” (§511)

⁵⁴ Title of the fifth chapter.

⁵⁵ The Professed members of the Society take the traditional three vows of poverty, chastity and obedience, together with a fourth vow of strict obedience to the Pope.

The second level of incorporation into the Society is composed of the auxiliaries of the Professed members, known as Coadjutors. The coadjutors can be either temporal or spiritual, with the latter always being ordained Priests.

The third level of incorporation into the Society is composed of the Scholastics, who are not trained. This includes all those that are still studying and have not received the Sacred Orders (Priests).

The fourth level of incorporation into the Society is composed of the novices, who are not considered to be members of the entity. This means that, strictly speaking, the social entity that is the Society has only three categories of membership: the Scholastics, the Coadjutors (either temporal or spiritual) and the Professed.

It is important to notice that this categorisation of membership is a novelty in the context of 16th century Religious Orders, and continues to be a factor of differentiation insofar as other Religious Orders do not practise it. Traditionally, a novice takes the three vows of poverty, chastity and obedience after one year of noviciate, and immediately becomes a professed member of the Religious Order in question. Ignatius devised a different mechanism of incorporation to ensure a better government of the Society. It was Ignatius's conviction that it was not easy to find people capable of governing the Society. That is why, besides placing great emphasis on the selection process, Ignatius envisaged a long training period before someone can become a Professed member, with the possibility of being elected for a governmental role: *“However, those who are both good and learned are relatively*

few; and even among these few, most are already seeking rest from their labours. We have thus found it a quite difficult matter to increase the numbers of this Society with such good and learned men, in view of the great labours and the great abnegation of self which are required in the Society. Therefore all of us, desiring to preserve and increase the Society for the greater glory and service of God our Lord, have thought it wise to take another path, that of admitting young men whose good habits of life and talent give hope that they will become both virtuous and learned in order to labour in the vineyard of Christ our Lord.” (§308)

The Professed members of the Society are therefore thoroughly tested during a long training period, which concludes with the Third Probation. The Third Probation is a one year long probation, to be undergone after the member of the Society has finished his training period as a formed Coadjutor. The members of the Society that can be granted the level of Professed are only the Spiritual Coadjutors. Therefore the following paragraphs will deal only with this level of Coadjutor.

After being ordained a Priest, the Scholastic becomes a formed Spiritual Coadjutor, and starts his pastoral activities in any of the multiple missions of the Society. After a certain period, which depends upon the individual and the decision of his Superior, the formed Spiritual Scholastic will cease his activities in the missions of the Society and will start the Third Probation training period. It is after the Third Probation that the Spiritual Coadjutor is evaluated and possibly granted the level of Professed. Should the individual not be considered apt for the level of Professed of four vows, he can become either Professed of only three vows, or Spiritual Coadjutor.

The Third Probation is also known as the “*school of the heart*” or the “*school of affects*”. Aldama (1989, p. 197) points out the fact that this terminology has led to misunderstandings, especially due to the influence of interpretations based on the expertise of psychology. According to Aldama (1989), the correct interpretation of this terminology, based on the meaning of the Latin word “*affectus*” would be based on the assumption that the Third Probation will treat the formation of virtues through “*exercising themselves in spiritual and corporal pursuits which can engender in them greater humility, abnegation of all sensual love and will and judgment of their own, and also greater knowledge and love of God our Lord; so that when they themselves have made progress they can better help others to progress for the glory of God our Lord.*” (§516)

One can be misled by the assumption that the degree of Professed is destined for those that are higher in virtue. However, this would call for the need to deploy a mechanism for the evaluation of those degrees of virtue. Such a mechanism is never envisaged in the Constitutions and would, in some sense, be contrary to what is proper to Ignatian spirituality. In this sense, what is stated in the Constitutions is that those who are Professed are supposed to be well-tested and learned: “*those persons will be judged suitable for admission to profession whose life is well-known through long and thorough probations.*” (§516) This means that it is the responsibility of all the individuals to continuously examine each other and to report the results of their evaluation to the Superior General “*to whom a report will be sent by the subordinate superiors or others from whom the general desires information.*” (§516)

The Third Probation, however, does indeed aim at training the Spiritual Coadjutors in virtues, especially enlightened by the need to deepen their sense of humility and indifference that might have been lost after a long period of academic training. Therefore, in the Third Probation, the spiritual Coadjutor will typically repeat the six experiences he had undergone in the noviciate. Not all the experiences are mandatory to repeat, except those related to the practice of humble tasks, and the Exercises last one month.

The degree of Professed of four vows is so important that only the Superior General can grant it⁵⁶. To know who should be granted the degree of Professed, the Superior General uses the information available to him in the correspondence archived at the General Curia, as will be clarified later.

The following sections will analyse how the entity is conducted by the Superior General, the Provincials and the Local Superiors.

⁵⁶ In special circumstances, the Superior General could delegate this power to the Provincial: *“In some very remote regions, such as the Indies, the general may leave it to the judgment of the provincial to decide whether or not certain subjects should be admitted to profession without awaiting approval from here [in Rome] (since it would not arrive for several years). However, in the regions where better communications exist he should not readily entrust admission to profession to any provincial, but should himself first be informed and give his consent individually for those who he thinks in our Lord should be admitted to profession.”* (§517)

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8.5 The government of the entity

The final three chapters of the constitutions, Chapters Eight, Nine and Ten, deal with the means necessary for the government of the entity. Chapter Eight is entitled “*Helps toward uniting the dispersed members with their head and among themselves*”, and is related with the specific character of the Society as an entity with members dispersed around the globe: “*The more difficult it is for the members of this congregation to be united with their head and among themselves, since they are so spread out in diverse parts of the world among believers and unbelievers, the more should means be sought for that union.*” (§655)

It is rather relevant that the Constitutions acknowledge another reason for the need on a chapter concerning the union of the Society’s members: “*There are also other reasons, for example, the fact that they will ordinarily be learned men who enjoy the favour of princes or important persons, or of peoples, and so forth.*” (§656) The Third Probation, as a school for the affections and humility, was also considered relevant, given the fact that the members of the Societies were learned persons, with strong doctrinal training at the university level. Ignatius was therefore convinced that this could undermine humility and the unity of the members.

The need to specify how the Society should take care of unity also stems from the fact that it does not have the usual means at the disposal of other Religious Orders, “*such as monastic stability, living together under the same roof, choral or communal prayer, conventual chapter and the like*” (Aldama 1989, p. 265).

The Constitutions devise two ways of uniting the members of the Society: the first is achieved through the “union of hearts”⁵⁷, spiritual union, and the second is physical gathering. It is important to note that the means for achieving union are not supposed to be used by the members of the Society, but by those who govern it.

The means for achieving spiritual union are obedience and fraternity. Obedience is the main source of union of the dispersed members, and it is underpinned by the belief that the Superior truly represents the will of God, and by the interior subordination of the subject: *“Since this union is produced in great part by the bond of obedience, this virtue should always be maintained in its vigour; (...) Those who are more important in the Society should give a good example of obedience to the others, by being closely united to their own superior and by obeying him promptly, humbly, and devoutly.”* (§659)

Obedience, as treated in the Constitutions, has two main dimensions: the authority to rule, and the subordination of one’s will. The Constitutions clarify what are the two main qualities of those who exert authority: reputation and the ability to govern: *“Very especially helpful, among other qualities, will be his credit and prestige among his subjects. (...) It will further help if his commanding is well thought out and ordered; he should endeavour to keep up obedience among the subjects in such wise that the superior on his part employs all possible love, modesty, and charity in our Lord so that the subjects may be disposed always to have greater love than fear for*

⁵⁷ *“Aids toward the union of hearts”* is the title of the first part of Chapter 8 in the Constitutions.

their superiors, though at times both are useful.” (§667) In the context of Ignatian spirituality, “ordered” means that the command given by the Superior must not have any disordered affections⁵⁸. Because, in the Society, the authority descends from the Superior General⁵⁹, and to better exert his authority the Superior General must communicate regularly with all the members, the residence of the Superior General will be at Rome “*where communications with all regions can more easily be maintained.*” (§668)

Subordination, in the Constitutions, is hierarchical: “*To the virtue of obedience also pertains the properly observed subordination of some superiors to others and of subjects to superiors, in such wise that the individuals who dwell in a house or college have recourse to their local superior or rector and are governed by him in all things. Those who are spread throughout the province refer to the provincial or another local superior who is closer, according to the orders they have received; and all the local superiors or rectors should communicate often with the provincial and thus too be directed by him in everything; and the provincials in their turn will deal in the same way with the general. This subordination, when thus observed, will uphold union, which to a very great extent consists therein, with the grace of God our Lord.*” (§662) There are exceptions to this principle of subordination, such as the collateral office. The collateral is a consultant and *admonitor* of a superior (§659-§661), and is not under the authority of the Superior to whom he is collateral. The

⁵⁸ The meaning of disordered affections will be clarified in the section on the Spiritual Exercises.

⁵⁹ “*It is thus from the general as head that all authority of the provincials should flow, from the provincials that of the local superiors, and from the local superiors that of the individual members.*” (§666)

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office of collateral is another innovation introduced by Ignatius in the government of Religious Orders.

One of the duties of the collateral is to foster unity⁶⁰, which is understood as fundamental. However, unity can only be achieved through uniformity of doctrine, judgement and will: *“Still another great help can be found in uniformity, both interior uniformity of doctrine, judgments, and wills, as far as this is possible, and exterior uniformity in respect to clothing, ceremonies of the Mass, and other such matters, to the extent that the different qualities of persons, places, and the like permit.”* (§671) It is through uniformity that fraternity, as a strong bond uniting all the members, can be achieved: *“Even in judgment about practical matters, diversity, which is commonly the mother of discord and the enemy of union of wills, should be avoided as far as possible. This union and agreement among them all ought to be sought most earnestly, and the opposite ought not to be permitted, so that, united among themselves by the bond of fraternal charity, they may be able better and more efficaciously to apply themselves in the service of God and the aid of their fellow men.”* (§273)

As for physical gathering, the mechanism devised by the constitutions is the Congregation meeting. However, given the fact that the Congregations, as stated earlier, are only rarely assembled, the main locus of physical gathering for the

⁶⁰ *“The collateral should also endeavour to bring the subjects to agree among themselves and with their immediate superior as far as this is possible, acting as an angel of peace among them and getting them to hold the proper esteem and love toward their superior.”* (§661)

members of the Society is the house where they live, which constitutes their community.

Chapter Nine of the Constitutions, entitled “*The Society’s head, and the government which descends from it*”, describes the role of the Superior General in particular. The Superior General has all the executive power in the Society, and holds a lifelong term. The latter is another innovation introduced by Ignatius in the government of Religious Orders. The reasons for having a lifelong term are twofold: to diminish the need for gathering a Congregation to elect the General; to capitalise on the experience of the Superior General in the office, avoiding pitfalls in the government of the entity.

The qualities required for the office of Superior General are divided, in the Constitutions, into three categories:

1. Spiritual qualities.
2. Natural qualities.
3. External gifts.

As regards spiritual qualities, the Superior General must be a man of prayer, excelling in virtue. Among the most important virtues required are the temperance of passions and humility, magnanimity, perseveration, fortitude and patience: “*Magnanimity and fortitude of soul are likewise highly necessary for him, so that he may bear the weaknesses of many, initiate great undertakings in the service of God our Lord, and persevere in them with the needed constancy, neither losing courage in*

the face of the contradictions, even from persons of high rank and power, nor allowing himself to be deflected by their entreaties or threats from what reason and the divine service require.” (§728) The virtuous character of the Superior General appears aligned with the nature of his office: he needs virtues so that he can govern better and lead the entity.

The natural qualities of the Superior General are related to academic training, his capacity for judgment and his capacity to work: “(...) *he ought to be endowed with great intelligence and judgment, so that he is not lacking in this talent in either speculative or practical matters which may arise. And although learning is highly necessary for one who will have so many learned men in his charge, still more necessary is prudence along with experience in spiritual and interior matters, so that he may be able to discern the various spirits and to give counsel and remedies to so many who will have spiritual necessities.” (§729)*

Given the need to govern the entity and to avoid the call for too many Congregations, the Superior General must also be healthy: “*As regards health, appearance, and age, account should be taken on the one hand of dignity and authority, and on the other of the physical strength demanded by his charge (...).*” (§731)

The external gifts of the Superior General are related to all that might foster his reputation: “*The sixth quality regards external things. Among these preferences should be given to those which help more toward edification and the service of God our Lord in such a charge. Such are normally esteem, a good reputation, and whatever else contributes toward authority among those within and without.*” (§734)

The reputation the Superior General has must exist prior to his election, marking his person over a long period of time: “(...) *he ought to be one of those who are most outstanding in every virtue, most deserving in the Society, and known as such for the longest time.*” (§735)

The tenth and last Chapter of the Constitutions is entitled “*How the whole body of the Society is to be preserved and increased in its well-being*”. This final chapter points to the purpose for writing the Constitutions, which is to provide the means for assuring the correct government of the entity and its members. Chapter Ten, therefore, whilst short, provides a thorough account of what is considered most relevant for the government of the Society. The means envisaged for the preservation and growth of the entity are:

1. The selection of candidates.
2. The deployment of means conducive to union among the members.
3. The assurance of a correct government.
4. The avoidance of relaxation.

Although it is assumed by the Constitutions that there is a need to increase the number of members of the Society, this increase must not be made by means of a compromise regarding the qualities of those to be admitted: “*Much aid is given toward perpetuating the well-being of this whole body by what was said in Part I [142-144], Part II [204], and Part V [516-523] about not admitting a mob and persons unsuitable for our Institute, even to probation (...)*” (§819)

Union among the members is supposed to be fostered through obedience, uniformity of behaviour and judgment, as well as mutual contact, especially achieved through the exchange of information⁶¹: *“This bond is strengthened by their getting information and news from one another and having much intercommunication, by their following one same doctrine, and by their being uniform in everything as far as possible, and above all by the bond of obedience, which unites the individuals with their superiors, and the local superiors among themselves and with the provincials, and both the local superiors and provincials with the general, in such a way that the subordination of some to others is diligently preserved.”* (§821)

The correct government of the Society is to be achieved by the means clarified previously, where the ninth part of the Constitutions was presented. However, in its tenth part, the Constitutions present a summary of what was stated before: *“Since the well-being or illness of the head has its consequences in the whole body, it is supremely important that the election of the superior general be carried out as directed in Part IX [723-35]. Next in importance is the choice of the lower superiors in the provinces, colleges, and houses of the Society. For in a general way, the subjects will be what these superiors are.*

It is also highly important that, in addition to that choice, the individual superiors should have much authority over the subjects, and the general over the individual superiors; and, on the other hand, that the Society have much authority in regard to

⁶¹ The obligation to write catalogues, as stated before, is one of the fundamental means for assuring mutual contact among the members of the Society, as will be clarified later.

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the general, as is explained in Part IX [736, 757, 759, 766-88]. This arrangement is made so that all may have full power for good and that, if they do poorly, they may be fully in subjection. It is similarly important that the superiors have suitable helpers, as was said in the same part [798-810], for the good order and execution of the affairs pertaining to their office.” (§820)

Relaxation is behind the deterioration of religious life. According to Ignatius, relaxation occurs in two fundamental dimensions: relaxation in poverty and ambition for governmental offices. To avoid relaxation in poverty, the Professed members of the Society must make a vow not to change any part of the Constitutions regarding poverty and not to accept any fixed income, or to have possessions or any other kind of recompense (§816). Ambition is also taken care of through special vows taken by the Professed members: *“The professed should similarly promise to God our Lord not to seek any prelacy or dignity outside the Society and, as far as in them lies, not to consent to being chosen for a similar charge unless they are compelled by an order from the one who can command them under pain of sin.” (§817)*

8.5.1 The governance mechanisms of the Society

In the following sections the main offices of the Society will be described, following not only what is stated in the Constitutions, but also various historical developments. The governance mechanisms of the Society will be described following the established hierarchy of the Society: the Superior General’s office will be described

first, followed by the Provincial and Local Superior's offices. For each hierarchical office the main support roles will also be described.

8.5.2 The Superior General

The Superior General, commonly known as the General, is the supreme superior (*supremus moderator*) in the Society. The main characteristics of the member to be elected General, as well as the way he should govern, are described in the ninth part of the Constitutions (§709-811). The General, who is elected by a Congregation with a majority of votes, cannot decline the nomination. To be elected, the General must be a Professed member of four vows and possess certain qualities: at the spiritual level, he must be known for his closeness to God, his charity and his humility; at the human level, he must be known for his prudence, discretion, hardworking capabilities and intellectual excellence.

Since the foundation of the Society, the General has been elected for a life term. This stipulation was approved in the first Congregation (1558) just after it elected General Lainez. This characteristic of the governance of the Society was quite polemical among the hierarchy of the Catholic Church, which induced Pope Paul IV not to approve it, imposing a triennial mandate on General Lainez. However, Pope Paul IV died before General Lainez completed his first triennium and the following Pope, Pope Pius IV, declared on the 22nd of June 1561 that the General of the Society is a life term mandate. This ended a controversy which had existed between the Society and the Catholic Church since the days of Ignatius as a General. This does not mean,

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however, that the Society was not criticised for this by other Religious Orders or even by its own members. The 31st Congregation (1964 – 1965) confirmed the fact that the General has a life term, but introduced the possibility of a renunciation of the office in a Congregation. The first time this ever occurred was in 1983, when General Pedro Arrupe presented his resignation (due to serious health problems) to the 33rd Congregation, which accepted it.

The Constitutions state that the General has supreme power over the Society, but only for edification (*ad aedificationem*) and not for the suppression of it (*ad destructionem*). To achieve this purpose, the General has the support of his Assistants and the Provincials. One of the most distinctive points in the government of the Society is the fact that the Superiors are elected by the General (§757) and not by local assemblies, known as Chapters, which was the common procedure followed by other Religious Orders in the 16th century.

However, the supreme authority in the Society resides in the Congregation. Once the Congregation ends, the General Assistant *ad providentiam* represents the Congregation and is responsible for surveying the General as regards his spiritual, intellectual and governmental capabilities. Should the General resign or die, a General Vicar will be responsible for gathering a Congregation with the purpose of electing a new General. Since the first Congregation, the General must designate as soon as possible a General Vicar so that in case he dies the Society will not lack power. The 27th Congregation determined the proceedings to make this nomination public.

The Constitutions state that the General Vicar substitutes the General whenever the latter is not capable of conducting the Society due to incapacity, when he dies or resigns from the office, or when, in special circumstances, there is the need for replacement or particular help. The General Vicar must be a Professed member of four vows, and should govern the Society according to the way the General would govern it (§687-689; §773). There are six types of General Vicar.

The first type of General Vicar has the right of succession. In the history of the Society this has occurred only twice. Juan Pablo Oliva was elected a General Vicar of the 11th Congregation, on the 7th of July 1661, and succeeded General Goswino Nickel on the 31st of July 1664; Antonio Maria Anderledy was elected a General Vicar on the 24th of September 1883 and succeeded General Pedro Beckx on the 4th of March 1887.

The second type of General Vicar temporarily substitutes the General. This General Vicar is either nominated by the General or elected by a Congregation. His functions are to substitute the General for a temporary mandate. The Constitutions state that there are two occasions when this General Vicar substitutes the General: health problems or extremely advanced age (§773). It is important to note that if the General does not nominate this General Vicar, then the Assistants should make him do it. Should the General refuse to nominate a General Vicar, a Congregation can be called. Besides those two reasons for substituting the General, the General Vicar can also be called to govern the Society should the General need to be absent from the

Roman Curia for a long time. After the 30th Congregation (1957) another reason was added: in case the General needs help in extraordinary matters.

The third type of General Vicar replaces the General in the case of death. The Constitutions stipulate that the General must nominate a General Vicar to govern the Society after his death, and before a Congregation designates another General (§687). Until the 33rd Congregation, five Generals had died without nominating a General Vicar: Ignatius, Láinez, Saint Francisco of Borgia, Everardo Mercuriano and Miguel Tamburini. The 4th Congregation insisted that the General should nominate a General Vicar and, should the General not do this, a special Congregation to elect a General Vicar should be convened. The only function of this General Vicar is to govern the Society until a new General is elected and to prepare the Congregation for the election of a new General.

The fourth type is the perpetual General Vicar. During the suppression of the Society of Jesus (from 1773 to 1814), three perpetual General Vicars were elected in Russia: Estanislao Czerniewicz, Gabriel Lenkiewicz and Francisco Javier Kareu. Ledóchowski asked the 28th Congregation (1938) to be helped by a perpetual General Vicar. The Congregation granted his request, as long as the General Vicar did not have a right to succession.

The fifth type is the coadjutor General Vicar. The 31st Congregation (1964-1965) authorised the General to elect a coadjutor General Vicar to help him with the government of the Society whenever the General felt appropriate.

The sixth type is the General Vicar who takes office after the resignation of a General. Whenever a Congregation accepts the resignation of a General, the General Vicar is the member of the Congregation chosen by the General. If the General does not choose a General Vicar, the office is assumed by the eldest (in terms of membership of the Society) General Assistant.

8.5.3 The Provincial

In hierarchical terms, the second most important level in the Society is the Provincial. The Provincial is the superior responsible for the government of a Province, which is a geographical area of influence of the Society of Jesus, typically consistent with a political geographical region (as is the case of Spain which has six Provinces) or a country (most of the Provinces fit this criteria). The Provincial must be a Professed of four vows.

According to the Constitutions, the Provincial helps the General in the government of the Society (§797). The personal characteristics of a Provincial must conform to what is said in the Constitutions about the General (§810-811). In this sense, there is an attempt to align the spiritual, human and intellectual capabilities of all those who are responsible for the government of the Society. The Provincial is nominated for a three-year mandate, renewable should the General find it appropriate. Typically, a Provincial is elected for two consecutive mandates, being replaced after 6 years. Only very particular circumstances contradict this practice.

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The power to nominate Provincials was given to the General of the Society on the 5th of July 1546 by Pope Paul III. By this time, Ignatius had nominated the first three Provincials of the Society: Simão Rodrigues (Portugal), Antonio Araoz (Spain) and Francisco Javier (India and all the Portuguese eastern maritime empire).

The role of the Provincial is described in the rules for the office. The first rules were written by General Borja, but were lost. Generals Mercuriano, in 1580, and Acquaviva, in 1582, wrote 137 rules for the office, complemented with 32 norms to be followed in the regular visits of the Provincial to the houses under his jurisdiction. General Ledóchowski adapted these rules on 1932, so that nowadays the office is described by 111 rules and the visits by 28 rules.

In some special cases, a region or country (for example, Mozambique) is not a Province but a Vice-Province dependent on a Province (in the case of Mozambique, it used to be dependent on the Province of Portugal). This link to a Province usually occurs for historical reasons (Mozambique was part of the Portuguese empire) and the Vice-Province is kept as such until it reaches a dimension that justifies an autonomous government. A Vice-Province is ruled by a Vice-Provincial who depends hierarchically on the Provincial. Therefore, all the issues related to a Province which require the approval of the General must go through the Provincial, although the Vice-Provincial can communicate directly with the General should he feel he must do so. The Vice-Provincial must be a Professed of four vows, and his Assistants are nominated by the Provincial. General Ledóchowski wrote 6 rules on

the office of Vice-Provincial in 1932. The last Vice-Province of the Society was Mozambique which is, nowadays, a dependent region. Currently there are no Vice-Provinces.

There is a second type of Vice Provincial, one who governs the Province whenever the Provincial is absent from the Province, when he cannot govern due, for example, to health conditions or when he dies (CN §342, n. 3). The Vice-Provincial is a Professed of four vows (CN §344, n. 2). Whilst the Vice-Provincial is temporarily replacing the Provincial he must govern the Province according to the ways the Provincial would and, whenever it is possible, he must consult the Provincial before taking decisions. In the case of the death of the Provincial, the Vice - Provincial must not change anything in the government of the Province until a new Provincial is elected (CN §336).

The third type of Vice-Provincial is the temporary Vice-Provincial, who is nominated by the Provincial in the case that the General does not nominate anyone. Should the Provincial die, there are several rules that determine the way the General chooses the Vice-Provincial (CN §345).

Another possible hierarchical level, inside the Province, is the Regional Superior, who is responsible for the government of an administrative region, which can be either directly dependent on the General or dependent on a Province (CN §387, n.2). A Regional Superior has all the rights and duties of a Provincial, except the right to

participate in a decision when a General resigns, or to vote for the election of the Assistant *Ad Providentiam* (CN §392).

To help the Regional Superior there is the Regional Vice-Superior, who is also a Professed of four vows, who temporarily governs a region in the event of the death of the Regional Superior. If the Regional Superior has not nominated a Regional Vice-Superior, then the region is temporarily governed by the Socio, should he be a Professed of four vows, or by the eldest Professed of four vows who is an Assistant of the Provincial. As an extreme case, if there is not a Professed of four vows among the Assistants, the office will be held by the eldest (in terms of date of entry into the Society) Superior of the region (CN §345).

8.5.4 The Local Superior

The third hierarchical level in the Society is the local Superior, who is the Superior of a house of Professed. These houses are different from those where the members of the Society who are studying live, insofar as it used to have special requirements concerning the vow of poverty. Nowadays, there is no distinction between a house of Professed and a house where the members still in training live (CN §401), usually referred to as a College⁶², in terms of the rules of government.

According to the Constitutions, the local Superior is nominated by the General (§683, §757). Generals Mercuriano (1580) and Acquaviva (1582) wrote 87 rules on

⁶² The term College is used in two senses: to designate the house where the members still in training live, and to designate colleges for external students (one of the most famous missions of the Society).

the office of the local Superior. General Ledóchowski, in 1932, put together the rules for this office and for the office of Rector (the Rector is the local Superior of a College). Nowadays these two offices are specified by 99 rules.

The Rector is the Superior of a house of training, sometimes referred to in the literature as a College. The term Rector derives from the name given to the person that ruled a College in the 16th century⁶³. The Rector is nominated by the General or by the Provincial, with the authorisation of the former (§490, §421, §740, §757, §419, §758). According to the Constitutions, the Rector does not need to be a Professed (of either three vows or four vows). However, in 1923 the 27th Congregation declared that the Rector should be a Professed of four vows.

The office of Rector was first formalised by General Lainez in 1561 through 17 rules. General Borgia, as decreed by the 2nd Congregation, reviewed these rules. Generals Mercuriano (1580) and Acquaviva (1582) wrote 84 rules regarding this office, later transformed into 99 rules when General Ledóchowski joined the office of Rector in 1932 with that of the local Superior in terms of rules. The two offices remain distinct nowadays.

Every local Superior has a Vice-Superior who will replace him in the case of death, temporary absence or if he cannot exercise his office due to special circumstances (CN §342, §346). The Vice-Superior is nominated by the Superior or by the Provincial.

⁶³ In the Paris Colleges, the term was Master.

8.5.5 The Visitors

Besides the above mentioned offices that are part of the hierarchical structure of the Society (or can be part of the hierarchical structure, such as the Regional Superior who cannot exist), there are offices related to the need to delegate special tasks or to inspect the way a Province is being governed. This kind of office is usually a temporary one. There are five types of temporary office: the Delegate Superior, the District Superior, the Commissar, the Inspector and the Visitor.

Every Superior can delegate some of his duties to a delegate who will be responsible for specific missions and (or) the members of the Society assigned to the Superior. To give an example, the General delegates to some Superiors the government of specific Roman missions that are not attached to the Province of Italy, like institutions that are transversal to all the Society.

The District Superior used to govern a region that was part of a territory not faithful to the Catholic Church. The District Superior was the delegate of the Provincial for a district. This office no longer exists in the Society.

The commissar is someone who has a special function and whose authority is delegated by a Superior. This office was typical of the Religious Orders contemporary to Ignatius. Therefore, this office is specified in the Constitutions without, however, great detail (§141, §745, §765). Some Congregations determine

the nature of the office in more detail (the 1st, the 2nd and the 4th Congregations), but the commissar stopped being used by the Society as a representative of the General, and was replaced by the Visitor.

The Inspector is nominated by the General to examine the way a house or a mission of the Society is being administered. The Inspector is supposed to evaluate issues such as religious observance, progress in studies and the financial situation, reporting back directly to the General. This office is not described in the Constitutions, and is distinguished from the Visitor because it does not have jurisdiction (the Inspector has no authority as a representative of the General) and is limited to very specific issues.

The need to create this office is related to the growth of the Society, something that was not foreseen when the Constitutions were written. Between the foundation of the Society in 1540 and 1600 the number of members and Provinces grew significantly, which induced administrative needs. Since the major decisions were centralised at the General level, General Acquaviva started nominating Inspectors in order to ensure that all the rules and behavioural specifications were being accomplished (Letter of General Acquaviva, 31st of July 1598). The Inspectors sent by General Acquaviva were crucial in assuring the conformity of the missions with the rules written in Rome. The nomination by General Acquaviva of Inspectors to check if the rules were being accomplished (in 1599) to ensure a correct administration of temporal goods (in 1601) and to evaluate the progress of academic studies (in 1602) reduced the need to gather Congregations. In fact, in 1599, all the Provincial

Congregations stated that there was no need for an extraordinary Congregation, since everything was being meticulously inspected (Philippart 1968).

It is important to note that the role of the Inspector is similar to what is expected of the Provincial whenever he visits the houses and missions under his jurisdiction. Since these visits occur annually, the Inspector appears to be a redundant role, yet important in order to guarantee the precision of the information the General gathers. General Acquaviva suspended the use of Inspectors at the end of his life and, after that, the Visitor also assumed the role of Inspector. The Inspector was, therefore, used at a very particular moment in the history of the Society, because throughout the mandate of General Acquaviva the Society grew in such a way that the administrative issues reaching the Roman Curia were not being taken care of in due time.

The Visitor is a temporary office, nominated by the General, to supervise a Province whenever the General finds it necessary. The Visitor is therefore an extraordinary office, nominated for the time span that the General determines, and with the powers the General wants. In the case of the General dying, the Visitor keeps his office until the General Vicar, after consulting with the General Assistants, or the new General determine otherwise (CN §386).

The need to have a Visitor is contemporary to Ignatius, who did not travel frequently as a General, although prior to being nominated he travelled extensively—as a General, Ignatius only left Rome on three occasions. Other Generals, prior to the

20th century, visited Provinces more frequently. However, the General at that time was supposed to live in Rome due to the difficulties of travelling. That was the main reason for the need of a Visitor.

Before the Suppression of the Society, the Visitors were used quite often, given that sometimes the Visitor was in the office for a long time due to the difficulty in reaching some Provinces. The 5th Congregation (1593) declared that it was useful for the Society of Jesus that the General himself visit the Provinces. However, this appeared to be difficult, and the practice of nominating Visitors was maintained. The Visitor was sent to solve daily issues and to help the Province to align “the way of proceeding” with that which is characteristic of the Society. Famous examples of this kind of visit include the visit of Jerónimo Nadal to the college of Coimbra, in Portugal, to solve problems in the correct understanding of the vow of obedience, as well as the visit of four Visitors to Spain, sent by General Mercuriano in 1577, to help in the interpretation of certain practices of austerity. In 1966, the 31st Congregation recommended that the General should travel more often in order to sustain the union of the Society. Following this recommendation, the succeeding Generals Arrupe and Kolvenbach visited the great majority of the Provinces.

8.6 Practices of Government

The government of the Society is highly centralised at the General level. The General has all the executive power, and is responsible for the admission and resignation of members, nominating and dismissing all the Superiors and taking decisions

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The Organising Principles of the Society of Jesus concerning all the missions of the Society. The line of authority, in the Society, goes from the General to the Provincial, and from the latter to the local Superior⁶⁴ (§662, §666, §736, §740, §757, §759, §820). This hierarchical subordination is, according to the Constitutions, set in order to guarantee unity in action. The Provincials and local Superiors are the focus of the union of those who live under their jurisdiction. They are a contact point with the universal Society⁶⁵.

The power of the General is *ad aedificationem* (§736); however, this power is balanced and controlled by the Society, represented in the Congregation and through the General Assistants (§767). The function of the Superior, according to Ignatius, is essentially paternal, and his subordinates should revere him with the heart more than externally (§551). This understanding of the hierarchical relation is described in the *Formula of the Institute*, number four.

There are, in the Constitutions, several references to the way a Superior should govern those under his responsibility: strong and loving relations (§551, §727); mutual esteem (§423, §551, §667); openness in communication (§91-§93). It is therefore trust that underpins the relationship between a member of the Society and his Superior. Ribadeneira provides several examples of the way Ignatius practised authoritative relationships⁶⁶. The good Superior knows how to balance strong authority with benign caring for those he supervises (§423, §727).

⁶⁴ Or Rector.

⁶⁵ Letter of Ignatius of Loyola to the College of Gandía.

⁶⁶ FontNarr 3:613, 618-619

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8.6.1 The Assistants

Every hierarchical office in the Society has an Assistant. The Assistant is understood, in the Constitutions, as anyone who helps another in his functions. There are, therefore, several types of Assistant determined in the Constitutions (§490, 703). However, the Assistants of the General are of great importance in the government of the Society (§766-811). The Assistants are not characteristic of the Society insofar as, for example, the Franciscans and the Dominicans also used Assistants of the General, although they did not use this term, rather “*definidores*”.

The Assistant is understood as someone who is collateral to the General in the sense that he is supposed to help him govern the Society. The Society has two types of General Assistants: the *ad providentiam*, who has authority over the General as the representative of the Society (§767); and the Assistant who advises the General in the government of the Society (§803-§805).

The Assistant *ad providentiam* is the delegate of the Society to exercise its providence over the General. This General Assistant must be a Professed of four vows, distinguished by his spiritual characteristics. The Society elects four *ad providentiam* General Assistants for the life term of the General, being responsible for advising him in everything they consider useful for the greater glory of God (§766, §779-§781).

The second type of General Assistant, those who help the General through advice, have had their offices distributed geographically since the foundation of the Society. Because of this way of distributing the Assistants, the Society is divided into Assistances. In the Constitutions, four Assistances are determined: Germany-France, Spain, Italy and Portugal. These General Assistants can combine this office with the *ad providentiam* office. Although they can prioritise issues in all that concerns their Assistances, the General has full authority over them. These Assistants are nominated by the General and not by the Congregation (§803-§805).

The 1st Congregation (1558) elected the first four General Assistants *ad providentiam*, who combined this office with the second type of General Assistant office. The growth of the Society, through the number of members, and the fact that the geographical dispersion of the Provinces also increased, led to the creation of more Assistances and, consequently, to the nomination of more General Assistants.

Before the Suppression (1773), two more Assistances were created. In 1608 the 6th Congregation created the Assistance of France (the request for the creation of this Assistance was made during the 3rd Congregation, in 1573); the Assistance of Poland and Lithuania was created during the 28th Congregation (1755-1756), after its creation had been requested in 1652.

After the Restoration (1814), the 20th Congregation (1820) elected four Assistants that, in the 21st Congregation (1829), took the Assistances of Germany, France, Italy and Spain. The 22nd Congregation (1853) elected the fifth General Assistant, Jose Bento da Silva

The Organising Principles of the Society of Jesus responsible for the English-speaking Provinces. At the 26th Congregation (1915) a sixth General Assistant was elected for the United States of America. In 1923, after the 27th Congregation, a seventh General Assistant for the Slave countries was nominated. The Assistance for Latin America was created in 1938 after the 28th Congregation, and the Assistance for India and Eastern Asia in 1957, after the 30th Congregation. Due to the growth of the Society in Latin America and Asia, these Assistances were divided, generating the following distribution: in 1958, after a recommendation of the 30th Congregation the Assistances of Northern Latin America and Southern Latin America were created; in 1961, the Society created the Assistances of Eastern Asia and India, now separated. In 1971 the Society created yet another Assistance: Africa and Madagascar, following a recommendation of the 30th Congregation (1957).

Therefore, in 1971 there were 12 Assistances with 12 different General Assistants. The significance of the distribution of these General Assistants was the fact that they combined the function of General Assistant *ad providentiam* with their regular office. This practice, predicted in the Constitutions and made traditional by the 1st Congregation, resulted in too many double assignments. After several recommendations from the Society asking for a review of this practice, sent during the preparation of the 31st Congregation, the Assistants were divided into the two new categories as follows: General Assistant (Regional and *ad providentiam* Assistant) and Regional Assistant (advice Assistant). The 34th Congregation (1995) established a board of Assistants of the General, composed of the General Assistants,

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the Regional Assistants and the General Advisers⁶⁷. The same person can assume
more than one office.

General Kolvenbach, on the 31st of July 1988, created the Assistance of Western Europe (eliminating the Assistances of England and France), the Assistance of Central Europe (eliminating the Assistance of Germany), the Eastern Europe Assistance (eliminating the Slave Assistance) and the Southern Asia Assistance (eliminating the Indian Assistance). On the 15th of February 1995 General Kolvenbach created the Southern Europe Assistance (eliminating the Assistances of Spain and Italy).

The General Board is constituted of the Assistants *ad providentiam*, the Regional Assistants and the General Advisers.

The Assistants *ad providentiam*, as stated previously, are those elected by a Congregation, and with authority over the General as far as what the Congregation has determined is concerned (§766-777). Due to their office, these General Assistants are always General Advisers (CN 380, n. 2). With the exception of what is deliberated during a Congregation, these General Assistants have a deliberative vote on all the issues that are under the jurisdiction of a Provincial (CN 375). There is no clear definition of the duration of the nomination for Assistant *ad providentiam*. Before the Suppression, the practice of the Society, following the interpretation of the 1st Congregation, was to maintain these Assistants for the life term of the

⁶⁷ Advisers for specific issues or missions.

General. Several Congregations confirmed this interpretation (GC I, d. 90; GC V, d. 73; GC VI, d. 4; GC XI, d. 12; GC XII, d. 1-2; GC XIV, d. 4; GC XVI, d. 6). After the 31st Congregation (d. 43, n. 4) it was stipulated that the General Assistants (the new terminology for the Assistants *ad providentiam*) could be replaced if, during the life term of a General, an extraordinary Congregation occurred. The 32nd Congregation decreed (d. 15, n. 1, b: CN 376 §1) that every extraordinary Congregation must elect the General Assistants, given that the current Assistants can be elected again, with no limitation on the number of elections. The 34th Congregation changed the terminology to refer to these Assistants back to its original form, naming them again Assistants *ad providentiam* (CN §363).

The Assistants *ad providentiam* cannot resign from the office or be dismissed by the General. However, if an Assistant *ad providentiam* needs to be replaced due to death, health conditions or misbehaviour, then the General can nominate a substitute, as long as he has the approval of the majority of the Assistants and the Provincials (CN 376 §§ 2-5).

Close to the office of Assistant *ad providentiam* there is the *Admonitor*. The *Admonitor* must advise the General in everything related to his way of governing or person (§770). The 1st Congregation (d. 22; d. 35), in 1558, determined that the *Admonitor* should be a Professed of four vows, that he should be elected by the Procurators of the Provinces, and that his mandate would last as long as the General was in office. Besides this, the 4th Congregation (d. 15) declared, in 1581, that the *Admonitor* does not need to be one of the Assistants. This same Congregation wrote

the rules concerning the office of *Admonitor* (GC IV, d. 43). Since the duties of the *Admonitor* are identical to those of the Assistants *ad providentiam*, the 1st Congregation (d. 82) determined that all the recommendations the Assistants *ad providentiam* want to make to the General must be through the *Admonitor*.

The Regional Assistants advise the General on all the issues that concern their Assistance. During a Congregation, these Assistants are elected by the General after receiving three candidates from each of the members of the Congregation from each Assistance. If the General wants to elect a Regional Assistant outside a Congregation, he must ask three candidates of the Provincials of the intended Assistance. The duration of the Regional Assistant office is between 6 and 8 years, and the Assistants should not be replaced simultaneously (CN §381, n. 1).

The General Advisers advise the General on all the issues that relate to the universal Society. The board of advisers is composed of the four Assistants *ad providentiam*, the Regional Assistants and the General Advisers, with whom the General entrusted a specific issue that concerns the entire Society. The General Advisers are nominated by the General after the deliberative vote of the Assistants *ad providentiam*, and after hearing the recommendations of the other General Advisers (CN §380, n. 2).

The General Advisers can be consulted individually or in a board of advisers so that the government lines of orientation are followed. The General Advisers should make spiritual discernment in order to take decisions (CN §382, n. 1). The General can form a section inside the board to take care of administrative and common issues.

Since this section does not need all the advisers, the only condition for its formation is that the Assistants *ad providentiam* form part of the composition of the section. The General Advisers who are not Assistants *ad providentiam* should be in office between 6 and 8 years (they cannot be replaced simultaneously) in order to achieve stability in the board composition (CN §381, n. 1). Besides the advice of the General Board, the General can also nominate experts for specific issues for no more than 8 years (CN §384, n. 1-2). The General can nominate these experts freely.

8.6.2 The General Curia

All the hierarchical offices in the Society, the General, the Provincial and the local Superior, are associated with the place where they live. The houses where the General and the Provincial live are called Curia, and are important insofar as they are the geographical centres of government of the Society.

The General Curia is the residence of the General and his staff. The word ‘Curia’ is used only twice in the Constitutions (§§ 329, 690), but in these cases refer to the Papal Curia. The General Curia does not fit in any of the residence categories included in the Constitutions since it is neither a Professed Residence, as long as it is not destined to the ministries and obliged to the vow of poverty, nor a College, since it is not sustained by regular incomes. The General Curia could be defined as a distinct residential category insofar as it is destined for the government of the Society.

Despite the fact that the term ‘General Curia’ is not used in the Constitutions, Ignatius does mention a residence for the General that must fulfil determined conditions for the government of the Society (§668), with good communication facilities between the General and the overall Society being the most important condition. That is why the General Curia has been in Rome since the foundation of the Society⁶⁸, and as close as possible to the Vatican. At the General Curia resides the General, all his staff and the Superiors responsible for the Society’s ministries that require global coordination: education, social work, refugees, media, Ignatian spirituality and praying, and the Christian Life Communities. The most important offices that comprise the General Curia in support for the General will now be briefly outlined.

The office of General Secretary is prescribed as necessary in the Constitutions (§800). The General Secretary is supposed to assist the General in his daily activities, including the writing of letters and other important documents. This office should be occupied by someone with good judgment, a solid theological doctrine and a thorough knowledge of the Society (§802). The General Secretary is nominated by the General (§760). This office is not an advisory post and, therefore, the General Secretary has no deliberation rights.

The office of General Procurator is prescribed in the Constitutions (§760). This office, typical of other Religious Orders, has the function of managing the relations

⁶⁸ With the exception of the period between 1873 and 1894 due to the confiscation of the Society’s properties in Italy. The 24th General Congregation (1894) recommended that the General Curia should return to Rome.

between the Society and the Papacy, as well as conflicts inside the Society concerning the Professed Houses and the Colleges. Since this is an office that is supposed to manage conflicts, the Constitutions recommend that the General Procurator reside near the General, but not in Profess residence (§807). After the 27th Congregation (1923), the General Procurator has resided at the General Curia (d. 273, n. 1). In spite of the fact that the Constitutions declare that the General Procurator should not be Profess (§806), several Generals have asked the Congregations to change this norm (GC XII, d. 29; GC XVII, d. 16; GC XVII, d. 21). However, only at the 27th Congregation (1923) was this request granted, and they divided this office into two offices: General Procurator and General Exchequer (GC XXVII, d. 273, n. 1). This was the only change the office underwent throughout the entire history of the Society.

Due to his office, the General Procurator has the right to attend a Congregation. In a Congregation, the General Procurator can participate in the election of the *admonitor*, but not in the election of the General and his Assistants.

The Provincial or Assistance Procurator was the manager of all the issues related to a Province or to an Assistance at the General Curia. In the Constitutions (§329) the office of Procurator is mentioned and described as being necessary in order to manage issues related to the Society at either the Papal Curia or at the King/Prince level if the matter could be solved by a King/Prince. The office of Procurator is again mentioned at the 12th Congregation (1682, d. 56, n. 2). At this same Congregation, the office of Assistance Procurator was recognized, and rules were provided for it. These rules were further revised at the 16th Congregation (1731, d. 29) and at the 18th

Congregation (1755, d. 18). The 27th Congregation declared those rules null due to their obsolete character (1923, d. 9).

The Procurator should take care of all the issues posed to him by the Profess Residences and by the Colleges of his Province or Assistance. After the 27th Congregation the last Procurator (from the Province of Spain) left the office, which has disappeared up to today. Besides the aforementioned offices at the General Curia, others exist that deserve to be mentioned briefly.

The General Exchequer is the person responsible for what is classified as secular issues, such as finance (CN §388, n. 1). This office was created at the 27th Congregation (1923) and used to be part of the office of the General Procurator.

The General is also assisted by a General Postulator, responsible for dealing with all the canonisation processes of members of the Society.

The Secretary of an Assistance is the assistant of a Regional Assistant. It is a rotating post in terms of the origin of the person. The rules concerning this post were published at the 7th Congregation (1615-1616, d. 30, d. 101).

The General Reviewer is part of a board of experts chosen from various nations that assist the General to ensure the Society is aligned in doctrinaire issues, especially in written documents. The 8th Congregation (1645-1646) declared that rules should be written for this office, and these were approved by the 10th Congregation (1652, d.

11). These rules were to be followed by all the Society's reviewers, such as the book reviewers. The origin of the office lies in the practice of reviewing all the books written by members of the Society as ordered by General Acquaviva. After the Restoration, the General Reviewer office was suspended, and General Wernz initiated the practice of constituting a board of reviewers, with one from each Assistance, amongst those who lived in Rome. It was General Ledóchowski who restored the office. This was further developed by General Janssens. By this time, the General Reviewer, together with a board of consultants, had taken the responsibility for assuring that everything that was written was in accordance with the doctrinaire principles of the Catholic faith, and with what the Society recommended. All the books, notes of classes from professors who are members of the Society, school programmes, papers and written conferences were to be reviewed. General Arrupe, on the 27th of June 1969, eliminated this office. Nowadays, the duties of the General Reviewer are fulfilled at the Provincial level.

8.6.3 The Provincial Curia

The Provinces also have a Provincial Curia, which were the Provincial, together with his staff, must reside. Usually, at the Provincial Curia, lives the Provincial Socio (which is, due to his office, also the Provincial Secretary, the Provincial *admonitor* and one of the Provincial Consultants). Besides the Provincial Socio, the Provincial has three other Provincial Consultants and one Provincial Exchequer. There should also be a reviewer for accountancy and another for the administration of all the

Houses. Should the Provincial wish to nominate other offices for specific issues, he must obtain authorisation from the General (CN §358, n. 1; §393; §356, n. 1).

The Provincial *Admonitor* is responsible for warning the Provincial about everything that he thinks the latter should change in his way of governing. This office is always occupied by the Provincial Partner, thereby being nominated by the General. He must transmit to the Provincial only those matters that the other Provincial Consultants have asked to be transmitted, or after having spiritually discerned their relevance. The rules concerning this office were first published by General Borgia (in 1567), and reviewed by Generals Mercuriano (in 1580), Acquaviva (in 1582) and Ledóchowski (in 1932).

The Provincial must have four Provincial Consultants, all of them nominated by the General. One important thing to notice regarding this office is that none of the Provincial Consultants can represent, in the course of his office, particular interests from Houses, Colleges or ministries. The Provincial Consultants are nominated by the General after a consultation of all the Houses (CN §355, n. 1; §355, n.2).

The Provincial Socio is an assistant of the Provincial. This office is similar to the office of the General Secretary. It was General Mercuriano who proposed this office, probably after the description of the office of *collateral* made in the Constitutions (§494). The rules concerning this office were published after a recommendation from the 12th Congregation (1682, d. 56, n. 2) and were later reviewed by the 27th Congregation (1932). These rules describe the scope of the work of the Provincial

Socio. If the Provincial wishes, he can also designate as a second Provincial Socio a Brother (GC VII, d. 27).

The Province Exchequer is responsible for the administration of all the material assets of the Province. If requested by the Provincial, he is also responsible for particular material needs of all the Houses in the Province (for example, he can be responsible for buying cars, civil works management and so forth). The Provincial Exchequer is nominated by the Provincial with the authorisation of the General. Due to his office, the Provincial Exchequer has the right to attend the Provincial Congregation (GC V, d. 81).

Besides the Province Exchequer, there is the Reviewer of the several accounts where money is kept, who is responsible for ensuring that money is being distributed as it should. The Reviewer is nominated by the Provincial with the authorisation of the General (CN §358, n. 1).

8.6.4 The Local Houses

The local Houses, managed by a Superior, have several other offices to ensure the daily administration of each House is in accordance with the Provincial's directions. The several supporting offices in a House are designed to help the Superior in the administration of the House. The main offices are the minister, the exchequer, the advisers, the spiritual affairs, the studies, the health, the church and the library. In the case that the House has a significant number of members, there can also exist a Vice–

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Superior or a Director responsible for a specific mission. Both these offices depend on the Superior (CN §404-§406).

All these offices have specific rules written by Ignatius, and published by Generals Mercuriano and Acquavia.

The Superior of a House also has an *admonitor*, who is responsible for advising the Superior on every issue the former considers important to align the administration of the House with the directions of the Provincial and with what is expected from a Superior. The *admonitor* is nominated by the Provincial, and he must only transmit to the Superior what the other advisers ask him to, or what he considers important after thorough reflection. The rules that describe the office of *admonitor* were written by General Borja (1567), and later revised by Generals Mercuriano (1580) and Acquaviva (1582). General Ledóchowski, in 1932, declared that the rules describing the *admonitor* of the Superior should be different from those applying to the *admonitor* of the Provincial.

The Superior is advised by a maximum of four advisers, nominated by the Provincial after hearing the opinion of all the members of the House (CN §355, n. 1; §356, n. 2).

The minister of the House is the closest office to the Superior. The minister is nominated by the Provincial (CN §358, n. 2), and he must conduct his office according to the judgement of the Superior. The minister is responsible for the

keeping of discipline and for taking care of all temporal issues (CN §404, n. 1). If the minister is a priest, he replaces the Superior in the case of absence (CN §346, n. 1). The rules that govern this office were first written in 1549, and later revised by Generals Mercuriano (1580) and Acquaviva (1582). The latest version of these rules dates from 1923, from the 27th Congregation. The minister is usually also responsible for any health-related issues of the members of the House.

The Superior and the minister can have someone to help them, called the *sotoministro*, for specific issues. The *sotoministro* replaces the minister in the case of absence, but not the Superior, unless otherwise stated by the Superior should both the Superior and the minister be absent. The rules concerning this office were published and reviewed three times, by Generals Mercuriano (1580), Acquaviva (1582) and Ledóchowski (1932).

The Exchequer of the House is responsible for the financial issues of the House. He should not be a Professed but a Coadjutor in order to free the Professed members of the House for their ministries. If this office is occupied by the minister or the Superior, then an adviser for financial issues should be nominated.

The spiritual adviser is someone that personally advises each member in spiritual issues. Every member of the Society must have a spiritual adviser (CN 66 §3; CN 232) and the first rules for this office were published by General Mercuriano (1580).

In every College of the Society, either a College for members or for external students, there must be someone responsible for the studies. This office has existed since the 2nd Congregation in 1565. This office is responsible for everything related to studies, including checking the validity of the curricula of Provincial Colleges or Universities. General Ledóchowski, in 1924, declared that this office can be occupied by someone close to the Provincial who overlooks all the education-related issues of the Province. This is the most common arrangement currently.

There can exist in each House someone responsible for the conscience cases. The conscience cases are a long tradition of the Society (O'Malley 1993). The first rules published on this office, by General Mercuriano (1580), state that twice a week a case should be discussed by all the priests of the House, and that someone knowledgeable must solve and explain the case. General Acquaviva (1599) reinforced this rule and stated that the cases should have a method of exposition and explanation. This type of case discussion no longer exists in the Society, given the stabilisation of the theological university training.

In each House there should also exist someone responsible for choosing the readings to be made during some meals. The first rules regarding this office were published by Generals Mercuriano (1580) and Acquaviva (1582), with the latter including a catalogue of recommended readings. These rules were reviewed by General Ledóchowski in 1932.

The Collateral is an office specific to the Society, created by Ignatius and not present in other Religious Orders. The Collateral is a “friend”, a confidant given to the Superior of a House and to the Provincial. He is also a regular adviser and informant. The Collateral is also an executive assistant and the intermediary between the Superior or the Provincial and those under his responsibility. However, the Collateral has no executive role. According to the Constitutions (§661), the Collateral is responsible for the union of all the members under obedience, preventing difficulties resulting from the weakness of human nature.

Ignatius introduced this office to relieve the Superior and the Provincial of the duty of uniting all the members. The Collateral was therefore someone nominated to help the Superior or the Provincial, but since it lacked executive jurisdiction it started to create some difficulties. After the Restoration of the Society the office of Collateral was abolished, although not in juridical terms. The understanding of the Collateral is, nowadays, confused with the understanding of the *admonitor*.

8.6.5 The General Congregation

The governance structures of the Society are markedly different from those of other Catholic Religious Orders (O'Malley 1993): the relevance of the legislative power of the Congregation, the mechanisms to elect superiors and their assistants, the role of the Procurators and the irregular character of the Congregations are distinctive in the way the Society governs itself when compared with other Religious Orders.

These mechanisms must be always analysed vis-à-vis the relevance of the Exercises, the importance given to the vow of obedience and with the life term of the Superior General and the attribution to this office of all executive power.

The Society is organised around three governance levels: the General level, the Provincial level and the House level.

The General level comprises the Congregation, the Superior General, the Congregation of Procurators, the Assistants of the General and the employees of the General Curia; the Provincial level comprises the Provincial, the Assistants of the Provincial and the employees of the Provincial Curia and the House level comprises the local Superior, his Assistants and the employees of the House.

The most important part of the General governance level is the General Congregation, which has the supreme power (*summa potestas*) in the Society. The entire Society, including the General, is submitted to the Congregation. The General has the obligation of gathering a Congregation whenever there is the need to take decisions that affect the mission of the Society. This means that the Congregation takes care of sporadic issues, and the General takes care of governance issues.

The Congregation represents the Society (§744), having all the legislative power. According to Article §732, all the Superiors, including the General, have only a participative power in the Congregation.

The Congregation also has the power to declare, meaning to interpret, the *Formula of the Institute*. This means that the Congregation can interpret the foundational activities of the Society, adapting them according to different times and locations. Besides this, the Congregation also has the power to interpret the foundational texts of the Society, the Constitutions and all the regulations that previous Congregations have declared. The Congregation shares with the General the power to interpret the regulations given by previous Generals, and of applying sanctions according to the laws and precepts of the Society.

Besides these legislative powers, the Congregation has the power to elect the General, his Assistants, his *Admonitor* and, eventually, the perpetual General Vicar. The Congregation can also dissolve Houses or Colleges of the Society.

In terms of lines of authority, the decrees of the Congregation are less powerful than the official documents of the Holy See and the Constitutions, but more powerful than the documents produced by the General. Despite all this power, the Congregation, as a governance mechanism, is limited by the fact that it gathers only rarely.

The Congregation is composed of the General, the general Vicar, the Assistants, the Provincials and the members of the Society elected by the Provinces especially for the Congregation. The number of elected attendants to the Congregation must be superior to the number of attendants of office position. Given the growth of the Society, the number of elected attendants has increased since the foundation. It should be noted that there is no rule concerning the duration of the congregation.

8.6.7 Conclusion

Although the Congregation has all the legislative power, the General has all the executive power. The difference between the powers of the General and the powers of the Provincial and the superiors of the Houses points to a centralised structure.

The functions of the General comprise:

1. All the executive power.
2. Part of the legislative power, since he is a member of the Congregation (entitled to two votes).
3. The right to promulgate rules, to interpret those made by previous Generals or adapt them to different times and locations.
4. The designation of the Provincials, the Superiors of the Houses and the general Visitors.
5. The admission of new members to the Society, the dismissal of members, the admission to the perpetual vows and the assignment of missions to the members of the Society.

6. The creation, control and suppression of missions, provinces, residences and colleges.
7. The gathering of the Congregation.
8. The mediation between the Society and the Holy See.

Although the list of governance powers that assist the General is long, he is limited in his actions in three ways:

The General is submitted to the Congregation.

The General cannot designate his successor, his Assistants, the general *Ad Monitor* or the General Vicar.

The General cannot dismiss a General Assistant by his own will.

The two main governance mechanisms of the Society are characterised by the absence of temporal constraints: the Congregation does not occur regularly (only 35 times in all its history) and the General is elected for life (there have been 30 Generals in all its history).

To help the General, the Congregation elects a group of eight Assistants. Besides this, the General can directly nominate more Assistants. Those Assistants that are

The Organising Principles of the Society of Jesus elected by the Congregation cannot be dismissed by the General. Should one of the Assistants have to leave office due to health problems or resignation (the resignation of an Assistant is very rare), the General can nominate one as long as he has the approval of the majority of his Assistants and of the Provincials. One of the Assistants, known as the *Ad Monitor*, has the function of transmitting to the General the observations of the other Assistants. The main role of the Assistants is to help the General administer the Society. The main functions of the Assistants are:

1. Assistance in financial decisions.
2. Attending to administrative decisions such as the erection of new Provinces, Houses, Colleges and Missions.
3. Attending to decisions related to the nomination, resignation and rotation of Superiors and Provincials.
4. Attending to decisions regarding the relationship with the Holy See.
5. Attending internal disciplinary decisions such as the admission of new members, the resignation of members and the admission to the Professed category.

Should the General be considered incapable of governing the Society, the Congregation of Procurators is gathered. The Congregation of Procurators gathers

four years after each Congregation, and every three years subsequently. The Congregation of Procurators is constituted by the General, his Assistants and the procurators elected among the Professed. The main task of the Congregation of Procurators is to assess the need to gather a Congregation.

At the provincial level, the Provincial is responsible for administering the Society in the geographical area comprised for the Province. Since the Provincial has as his main task the implementation of the overall mission of the Society in the Province, his election is submitted to a detailed procedure aimed at choosing the best member of the Society for the office. The election of a Provincial proceeds as follows.

After hearing the advice of his Assistants, the current Provincial sends a list of three candidates to the General (known as the *terna*). The Constitutions state that the Provincial will designate four special advisers that will fulfil a form of 45 questions regarding each of the three candidates. This questionnaire covers issues related to previous offices occupied by the candidates, their physical health, their psychological condition, their standing outside the Society, among others.

Besides this, the Assistants of the Provincial will also fulfil the questionnaire regarding the candidates, send it to the Provincial who will gather all the information and prepare a report for the General. The Assistants of the Provincial must also write a personal letter, sent directly to the General, with their opinion on the candidates.

After this procedure, the General has at his disposal eight different sources of information about each of the candidates. Besides all this information, the General can consult the catalogue “*apti ad gubernandum*” which contains a list of all those who are capable of assuming a governing office. This catalogue is updated by the Provincial and his Assistants every three years.

The General can, after gathering all the necessary information, nominate after the advice of his Assistants the Provincial. The General has the power to nominate a Provincial that was not part of the “*terna*”. The nomination of a Provincial outside the *terna* is frequent when the members of the Province have not been in the Province for many years due to the rotation of the members of the Society.

The duration of the Provincial office is three years, renewable for another three. The Provincial may hold his office for more than six years, but the Constitutions advise to the contrary. Although the powers of the Provincial are limited, this does not mean that he serves as a mere intermediary between the Province and the General. The Provincial has, in fact, much autonomy to, together with his Assistants, deliberate about daily administrative issues of his Province.

The four Assistants of the Provincial are nominated by the General. The Assistants of the Provincial help him in the administration of the Province and in decisions related to abnormal issues. The Provincial must meet with his Assistants at least once a month. In these monthly meetings a list of points, enumerated in the Constitutions, must be addressed.

The Congregation of the Province is composed of the Provincial, the Superiors of the Houses, the member of the Provincial Curia responsible for financial issues and the Professed members. The Congregation of the Province designate the delegates of the Province to the Congregation of Procurators and to the Congregation. Those elected to these two Congregations must be Professed. The Provincial Congregation does not have any legislative or regulative power. The elected delegate of the Congregation of the Province must report the state of affairs of his Province to the General.

The last governance level is mainly represented by the local Superior, who is nominated by the General, according to the “*terna*” procedure described above. Their mandate is of three years, renewable. However, once again, the Constitutions state that no one should stay in this office for too long. According to article §703 of the Constitutions, the local Superior should address the Provincial frequently. Therefore, the powers of the local Superior are quite limited. In fact, the autonomy of a local Superior is primarily related to financial issues.

As with all other hierarchical levels, the local Superior must have Assistants, known as Consultants, and one *Admonitor*. These Consultants and the *Admonitor* are nominated by the Provincial to assist the local Superior. The local Superior must meet with his Consultants at least once a month.

The number of offices stipulated to govern the Society is limited. However, the main question related to these offices is how to ensure that whatever is determined for

each office is accomplished in accordance with the will of the Society represented in the Congregation. As stated previously, one of the main mechanisms to guarantee that the Society is properly governed is the use of regular correspondence with the General Curia. The next section highlights how the Society uses correspondence to integrate the three governance levels described thus far.

8.7 The relevance of correspondence in the Society

Ignatius saw in correspondence not only a government mechanism, but also a means to ensure unity of the body, as the title of the eighth part of the Constitutions clearly states, and this is clear after analysing the several particular norms it envisages (§673–§676). The minutiae of some norms have changed due to changes in the size of the Society, but the main obligations related to the use of correspondence have remained unchanged: the Provincials must always be in written contact with the General, informing him of details related to the regular visits to the different Houses of the Province, to all the members, sending, annually, a catalogue with biographical notes on all the members. Every three years, the Provincial must compile a catalogue with more details on all the members of his Province, indicating their missions and their aptitudes. Apart from all this, the Provincial must present the General, in the correspondence, all those that can be elected as Superiors, those that can be elected Professed, and make him as fully aware as possible of all the missions, projects, decisions and everything considered crucial for the quality of the information that he has.

The local Superiors, as is the case with their consultants and the Provincial's consultants, must also write letters to the General, bypassing the Provincial. The purpose of this is to gather information on the same subjects, but from different points of view. Therefore, at the Roman Curia, the General and his Assistants regularly check for inconsistencies in the information received.

There are different types of letters to be sent to the General, all of which have different purposes serving the government of the Society. All of these types are described in the following paragraphs.

The *Litterae quadrimestres, semestres and annuae* letters are sent to the General every four months, six months and year respectively. The *quadrimestrales* letters (§675) should be sent every four months, both to the Provincial and the General. The content of these letters should foster edification and comfort to those who read them (§673). According to the Constitutions (§276, §280), the edification of other members means everything that can contribute to the spiritual growth of the person. It is not related, therefore, with pietism. This was the original purpose of these letters. However, they were also useful for the government of the Society. These letters should be sent in January, May and September. After being read and corrected by the Society's secretary, the letters are circulated through all the Society⁶⁹.

In 1564, General Lainez decreed that these letters should be sent only twice a year, so they were hereafter referred as "*semestrales*". The second Congregation decreed

⁶⁹ EpIgn 1:548 (letter of Polanco)

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that these letters should be annual and that they should contain biographical notes on deceased members. After 1651 the publication of these letters was interrupted. After the Restoration of the Society, many Provinces published their annual letters independently and in the form of news. After 1960, the Roman Curia publishes the *Annuario Societatis Iesu* that is a complement to the annual letters.

The *Litterae ex officio* are to be written by the local Superiors to the Provincial every week. The same rule applies to the Provincial, who must write weekly to the General. The General must write every month to the Provincial, and the latter to all the Superiors and the individual members whenever possible (§647, §790). These letters were vital for Ignatius, who often gave detailed directions on those sent on missions, on what they should do and how to behave. In 1564, General Lainez reduced the number of letters, given the increasing number of members of the Society. These letters contain information on the regular visits of the Provincial to the different houses, official documents such as contracts, accounting issues and so forth. These were, therefore, important letters for administrative issues concerning the daily operations of the Society.

In 1580, General Mercuriano sent an instruction to the Society, entitled *Formula Scribendi*, acting in accordance with a recommendation of the third Congregation. The *Formula Scribendi* establishes norms on how to write letters according to the Constitutions (§629, §673-§676). The *Formula Scribendi* has three parts:

1. Dealing with the letters of the Superiors.

2. Dealing with the annual letters.

3. Dealing with the catalogues and the annual information.

In 1923 the 27th Congregation decreed that these norms should be established by the General. In the 34th Congregation, this was again reinforced. Nowadays, the General is the only person responsible for establishing the norms relative to the correspondence.

There were, however, previous attempts to substitute the *Formula Scribendi*. In 1831 General Roothaan published the *Practica Quaedam ad Formula Scribendi*. This instruction has undergone several revisions (the last one in 1973) and contains norms on all the usual documents written at the Provincial level and official formulas for the standardisation of writing.

The other types of letters sent to the General are the *Informationes*. These letters contain specified types of information and are written on two main occasions:

For the election of Superiors, Provincials and the General.

For the nomination of members for the different categories.

Four days before the Congregation to elect a General is assembled, information is gathered concerning the Assistants of the General. To elect the delegates that are sent to a Congregation, information is also retrieved.

The election of a Provincial proceeds as follows. After hearing the advice of his Assistants, the current Provincial sends a list of three candidates to the General (known as the *terna*). In the mid-20th century, the Provincial would designate four special advisers who would complete a form of 45 questions regarding each of the three candidates (Moulin 1964). This questionnaire covered issues related to previous offices occupied by the candidates, their physical health, their psychological condition, their standing outside the Society among others. Besides this, the Assistants of the Provincial also filled out the questionnaire regarding the candidates, send it to the Provincial who would then gather all the information and prepare a report for the General. The Assistants of the Provincial also wrote a personal letter, sent directly to the General, with their opinion on the candidates. After this procedure, the General had at his disposal eight different sources of information about each of the candidates. Besides all this information, the General could consult the catalogue *apti ad gubernandum*, which contains the list of all those who are capable of assuming a governing office. This catalogue is updated by the Provincial and his Assistants every three years.

The General can, after gathering all the necessary information, nominate following the advice of his Assistants of the Provincial. The General has the power to nominate a Provincial that was not part of the *terna*. The nomination of a Provincial outside the

terna is frequent when the members of the Province have not been in the Province for many years due to rotation of the members of the Society.

Whenever a nomination is to occur, information is gathered on the different members to be assigned. The typical situations where there is the need to obtain detailed information on a member of the Society are:

- a) Before beginning the studies on theology.
- b) Before being ordained a priest.
- c) Before being nominated a Professed.
- d) Before being sent on an international mission.
- e) Before being elected a local Superior.

Another type of written information sent to the General is the Catalogues. The Constitutions (§676) stipulate that the information concerning the members of the Society must circulate. Every four months, a list containing every member of the Society and the house he is attached to is sent to Rome to form the Catalogues.

In 1573, the third Congregation stipulated that General Mercuriano could introduce changes to the Catalogues. There used to be three types of Catalogues. The first one, to be sent every three years, had information on the name, date and place of birth, date of entry into the Society, academic qualifications and information on which vows the member had attained. The second, also to be sent every three years, had information on the physical and moral qualities of each member, his character, his talents and his aptitude for the ministries of the Society. The third contained the list

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Together with the annual Catalogue there was the habit of sending a supplement to the Catalogues, sent every three years. These supplements had information concerning the changes that had occurred every year so that the triennial information could be annually updated. According to the *Practica Quaedam*, the first annual catalogue and the supplements are called *Scheda Personalis n. 27* and *Scheda Personalis Supplementum n. 28*, respectively. The *Scheda Personalis n. 27* is sent to the Roman Curia only once in a lifetime of a member; the *Scheda Personalis Supplementum n. 28* is sent every three years until the age of 65.

8.8 The Spiritual Exercises of Ignatius of Loyola

The book entitled *The Spiritual Exercises* is the most famous book written by Ignatius, and indeed the only book he fully wrote. The Exercises, as a book, are not easy to understand insofar as the structure is not clear. However, the purpose of the Exercises is not to read them but to practise them.

The Exercises are usually conducted in the form of a spiritual retreat, destined to anyone who wishes to take a decision in accordance to God's will. Typically, the Exercises are ministered in retreats of either three or seven days. However, in their original form, the Exercises were to be ministered in retreats for the duration of one month. For the purposes of the current research, the Exercises will be approached not

as a spiritual retreat, like many others, but as decision-making process (Rahner 1971). As a decision-making process, the Exercises are used by the Society either as on an individual or a collective basis.

In the context of the Society as an entity, the practice of the Exercises is mandatory for all the members and for all the candidates. Before being admitted to the noviciate, any candidate must practise the Exercises for at least one week; while in the noviciate, and before being admitted as a Scholastic, the member of the Society must practise the Exercises for one month; in the third probation, and before being admitted as a Professed, any member of the Society aspiring to achieve that grade must practise the Exercises for one month for the second and last time in his religious life⁷⁰. Throughout his religious life, the member of the Society is obliged to practise the Exercises for one week every year.

As a decision-making process, the Exercises are intended to guide the individual in the election of an important life decision, for example the decision to join a Religious Order, the decision on which career path to undertake, among others. The types of decisions that call for the practice of the Exercises are therefore rare in the life of any individual. In this sense, it would be legitimate to ask why there is the need to practise the Exercises every year. The following paragraphs, after clarifying the nature and the structure of the Exercises, will outline the relevance that the main

⁷⁰ A member of the Society must only practise the month-long Spiritual Exercises twice in his life because otherwise such a practice would be time-consuming, not allowing him to be available for other tasks.

objectives of the Exercises assume in the context of the Society as an entity, namely the indifference as a primordial state of the subject to be governed.

The Exercises are divided in four parts, known as “weeks”⁷¹. The first week is entitled “Spiritual Exercises to overcome oneself and to order one’s life, without reaching a decision through some disordered affection” (SE §21⁷²). During the first week of the Exercises, the individual examines his conscience with the objective of confessing all his sins. The first week begins with the famous meditation on the “Principle and Foundation” of life: “Human beings are created to praise, reverence, and serve God our Lord, and by means of doing this to save their souls. The other things on the face of the earth are created for the human beings, to help them in the pursuit of the end for which they are created.

From this it follows that we ought to use these things to the extent that they help us toward our end, and free ourselves from them to the extent that they hinder us from it.

To attain this it is necessary to make ourselves indifferent to all created things, in regard to everything which is left to our free will and is not forbidden.

⁷¹ Due to the fact that each part is supposed to be practised for one week in the case that the Spiritual Exercises last for one month.

⁷² All the citations of the numbers of the Spiritual Exercises follow the original numbering, and are in accordance with the following notation: SE, followed by “§” and the number of the paragraph. The edition of the Spiritual Exercises used is Loyola, I. o. (1992). The Spiritual Exercises. Saint Louis, The Institute of Jesuit Sources.

Consequently, on our own part we ought not to seek health rather than sickness, wealth rather than poverty, honour rather than dishonour, a long life rather than a short one, and so on in all other matters. Rather, we ought to desire and choose only that which is more conducive to the end for which we are created.” (SE §23) This meditation, probably the most important in the Exercises, clearly specifies the main objective of the Exercises: to decide in such a way that all possible outcomes, before starting the Exercises, are truly indifferent. The individual that practices the Exercises must be indifferent, not desiring any particular outcome of the decision-making process. The four parts that constitute the Exercises are organised around the principle of indifference as the cornerstone of a good decision, and around the “*magis*” as the only possible outcome of a decision that is existential in its nature (Rahner 1971).

The indifferent individual is not fully indifferent insofar as he stops being indifferent after the moment he chooses the correct option. Indifference is not a relativist stance, but a call for more (“*magis*”). The Latin expression “*magis*” is one of the most famous characteristic dimensions of the spirituality of Ignatius, and is deeply rooted in the Exercises. In this sense, the indifferent subject of the Exercises is not the self-mastered subject of Stoicism as referred to by Foucault (Foucault 1981; Foucault 1990; Foucault 1992). The indifferent subject differs from the self-mastered subject because the objective of the Exercises as a practice is not indifference by itself, but the autonomous choosing of a form of life considered to be better in the sense that it leads to a desired end. The indifferent subject therefore does not really choose, but accepts to be conducted by God. The indifferent conduction of one’s life is therefore

directly related to the ability to accept the conduction of one's life in accordance with God's will. The indifferent subject is therefore not only distinct from the self-mastered subject, but also distinct from the ascetic subject of early medieval Religious Orders. The indifferent subject is not nullified by ascetic practices, but is active in his search for continuous improvement. The latter movement is what distinguishes "*magis*". The indifferent subject autonomously elects what God determines to be best for his life.

Indifference as the fundamental state of the subject, and "*magis*" as the inner movement that underpins the possibility for change on any dimension of the individual Self, are what allow a clear understanding of the inner structure of the Exercises. After understanding these two aspects it is easier to grasp the meaning of the four weeks.

During the first week the subject will practise a group of exercises to detail his sins and to achieve forgiveness through a Confession. The objective of the first week of the Exercises is to clarify what is sinful in the subject. During the second week, entitled "The contemplation of the kingdom of Jesus Christ", the subject is supposed to meditate on the life of Jesus Christ as a model. The objective of the second week of the Exercises is to choose a life similar to Christ's life. The second week's meditations are dedicated to the contemplation of the most important known moments of Christ's life. Before entering the third week, the subject is supposed to take whatever decision has appeared to him as the best one in accordance with what

he has meditated on Christ's life. This is what is known as the election moment, for which Ignatius devised a set of principles to foster the decision making.

The third week, which has no title, is dedicated to the meditation of Christ's suffering after accepting God's will for himself. All the meditations of the third week follow Christ's last known moments, such as the Last Supper, the suffering in the garden, the process of Pilate, until the Crucifixion moment.

The fourth week, also without title, is devoted to the meditation on the Resurrection of Christ, being quite short. The most famous meditation of the fourth week is the "Contemplation to Attain Love". The objective of this contemplation is to foster the love for God after meditating on everything good the subject has been given, either by nature or by the Grace of God (for instance the redemption of all the subject's sins). The Exercises, as a practice, always end with the "*Contemplation to Attain Love*".

The method proposed by the Exercises to take a decision is therefore based on the knowledge of the subject (which is the objective of the first week), on the knowledge of Christ's life (which is the objective of the second week), and on the autonomous acceptance of the decision taken on the second week (which is the objective of the third and the fourth weeks). The Exercises are, therefore, in their structure, not directed at taking a decision after terminating the practice, but at autonomously accepting the decision taken during the practice. It is not by chance, therefore, that the moment for taking a decision occurs in the middle of the Exercises.

The need to know the subject and to know which dimensions characterise Christ as a subject point to an existential knowledge underpinning the Exercises (Rahner 1971). This is important to note, insofar as the way the subject decides, in the Exercises, is not related to the acceptance of general principles. That would be the case for a decision characteristic of a self-mastered and stoic subject, which is not what the Exercises aim for. The indifferent subject is not conducted by general principles, but by a special type of knowledge: existential knowledge (Rahner 1971).

The conduction of an individual, once assumed to be determined by general principles, entails an ethical stance. In this sense, the relationship between the conduction of an individual and the general principles that enlighten that conduction resembles the problem of the relationship between the unique and the multiple that has perpetrated philosophical thought since Antiquity. Since everyday conduction of behaviour cannot be considered solely through the conformity with a set of general ethical principles, the conduction of behaviour in particular instances calls for a different approach to the governmental problem. In this sense, the care of the self as envisaged by Foucault (1990) makes clearer the relationship between practices of care of the self and the deployment, in modernity, of a governmental form of power. The ethical stance present in Foucault's later work, through the analysis of practices of care of the self directed towards the shaping of a self-mastered subject, can be analysed by the need to solve the dichotomy present in the possible relation between general ethical principles and the attempt to conform behaviour, not only with

general principals, but mainly with particular instances characteristic of everyday life.

The Exercises of Ignatius, as a practice of the self, should be analysed not as related to general principles drawn from the Catholic Church's doctrine, but as a practice that goes beyond an ethical stance and that, through the daily discernment of spirits, made tangible in the practice of the daily examination of conscience, unfolds an ethics of the individual based on what Rahner calls existential knowledge (Rahner 1971). This special form of knowledge is what makes possible the deployment of a different form of power, pastoral power, as a technology used for the coordination of the individual members of the Society.

The above referred moment of election in the Exercises is to be understood, therefore, as a guidance problem. Conducting individual behaviour raises several questions, especially in the context of an organisation that must conform to general principles drawn from the Catholic Church's doctrine. The regulations for the guidance of the Exercises do acknowledge the need to conform one's behaviour with the general principles of the Catholic Church's doctrine: "It is necessary that all the matters about which we wish to make an election should in themselves be either indifferent or good, so that they function constructively within our Holy Mother the hierarchical Church, and are not bad or opposed to her." (SE §170) However, the binding of individual conduct to such general principles is the first step in taking a decision, entailing what could be defined as a general ethics, as opposed to a situational ethics, which is what one seeks. The problem of conducting individual

behaviour in particular situations is what the Exercises aim at, acknowledging that the conformity of behaviour with general principles, although ethical, *id est*, not sinful, does not solve the problems posed in particular instances, which call for situational ethics.

How is guidance achieved in situational ethics? If general principles are to be understood merely as the minimum required to take a good decision, what is it that guides behaviour? Before moving on to the answer given by Ignatius to this question, it is important to note that such situational ethics invert the logic inherent to former practices of the self, which relied heavily on general principles that would foster self-mastery, either in Ancient stoicism or in primitive monasticism.

The conduction of behaviour in particular instances is underpinned by existential knowledge, which is self-evident knowledge of the individual (Rahner 1964). The way the Exercises detail how the individual must elect make clear what existential knowledge means. Ignatius specifies three different modes of election:

1. *“The First Time is an occasion when God our Lord moves and attracts the will in such a way that a devout person, without doubting or being able to doubt, carries out what was proposed. This is what St. Paul and St. Matthew did when they followed Christ our Lord.”* (SE §175)

2. *“The Second Time is present when sufficient clarity and knowledge are received from the experience of consolations and desolations, and from experience in the discernment of various spirits.”* (SE §176)

3. *“The Third Time is one of tranquility. I consider first the end for which human beings are born, namely, to praise God our Lord and to save their souls; then, desiring this, as the means I elect a life or state of life within the limits of the Church, in order to be helped in the service of my Lord and the salvation of my soul. By a time of tranquillity I mean one when the soul is not being moved one way and the other by various spirits and uses its natural faculties in freedom and peace.”* (SE §177)

As is clear from the original text of the Exercises, the first two modes of election are based on individual interpretation. What is distinctive in the text of the Exercises is that the third mode of election is to be considered an exception: *“If an election is not made in the first or second time, two methods are given below for making it in this third time.”* (SE §178) The methods given to make an election in the case that the first two modes are not sufficient are based on several rules which are rational in their nature. However, for the first two modes of election, Ignatius details eight *Rules for the Discernment of Spirits* (SE §329-SE §336). These rules are used by the individual to separate consolation from desolation, considering that only God can provide consolation and that, therefore, only after the detection of consolation can the individual be sure that the election is correct.

The assertion that is through the inner movements of the soul, characterised as either consolation or desolation, that the individual conducts his behaviour could lead to the misinterpretation that the Exercises call for a mystical form of decision, outside the binding general principles of the Catholic Church. It has been stated previously that the mystical approach as a form of direct communication with God was one of the reasons behind the rise of monasticism, as opposed to the anchorites. The Exercises' mode of election did generate conflicts between Ignatius and the Inquisition due to the apparent mystical character of the Exercises, and to the open possibility of a direct communication between the individual and God. However, a closer reading of the *Rules for the Discernment of Spirits* points to a different possibility. The Rules for the Discernment of Spirits are:

1. *“The First Rule: It is characteristic of God and his angels, by the motions they cause, to give genuine happiness and spiritual joy, and thereby to banish any sadness and turmoil induced by the enemy. It is characteristic of the enemy to fight against this happiness and spiritual consolation, by using specious reasonings, subtleties, and persistent deceits.”* (SE §329)

2. *“The Second. Only God our Lord can give the soul consolation without a preceding cause. For it is the prerogative of the Creator alone to enter the soul, depart from it, and cause a motion in it which draws the whole person into love of His Divine Majesty. By “without [a preceding] cause” I mean without any previous perception or understanding of some object by means of which the*

consolation just mentioned might have been stimulated, through the intermediate activity of the person's acts of understanding and willing.” (SE §330)

3. *“The Third. With or by means of a preceding cause, both the good angel and the evil angel are able to cause consolation in the soul, but for their contrary purposes. The good angel acts for the progress of the soul, that it may grow and rise from what is good to what is better. The evil angel works for the contrary purpose, that is, to entice the soul to his own damnable intention and malice.” (SE §331)*

4. *“The Fourth. It is characteristic of the evil angel, who takes on the appearance of an angel of light, to enter by going along the same way as the devout soul and then to exit by his own way with success for himself. That is, he brings good and holy thoughts attractive to such an upright soul and then strives little by little to get his own way, by enticing the soul over to his own hidden deceits and evil intentions.” (SE §332)*

5. *“The Fifth. We should pay close attention to the whole train of our thoughts. If the beginning, middle, and end are all good and tend toward what is wholly good, it is a sign of the good angel. But if the train of the thoughts which a spirit causes ends up in something evil or diverting, or in something less good than what the soul was originally proposing to do; or further, if it weakens, disquiets, or disturbs the soul, by robbing it of the peace, tranquillity, and quiet which it enjoyed earlier, all*

this is a clear sign that this is coming from the evil spirit, the enemy of our progress and eternal salvation.” (SE §333)

6. *“The Sixth. When the enemy of human nature has been perceived and recognized by his serpent’s tail and the evil end to which he is leading, it then becomes profitable for the person whom he has tempted in this way to examine the whole train of the good thoughts which the evil spirit brought to the soul; that is, how they began, and then how little by little the evil spirit endeavoured to bring the soul down from the sweetness and spiritual joy in which it had been, and finally brought it to his own evil intention. The purpose is that through this experience, now recognized and noted, the soul may guard itself in the future against these characteristic snares.” (SE §334)*

7. *“The Seventh. In the case of those who are going from good to better, the good angel touches the soul gently, lightly, and sweetly, like a drop of water going into a sponge. The evil spirit touches it sharply, with noise and disturbance, like a drop of water falling onto a stone. In the case of those who are going from bad to worse, these spirits touch the souls in the opposite manner. The reason for this is the fact that the disposition of the soul is either similar to or different from the respective spirits who are entering. When the soul is different, they enter with perceptible noise and are quickly noticed. When the soul is similar, they enter silently, like those who go into their own house by an open door.” (SE §335)*

8. *“The Eighth. When the consolation is without a preceding cause there is no deception in it, since it is coming only from God our Lord, as was stated above. However, the spiritual person to whom God gives this consolation ought to examine that experience with great vigilance and attention. One should distinguish the time when the consolation itself was present from the time after it, in which the soul remains still warm and favoured with the gifts and aftereffects of the consolation which has itself passed away. For often during this later period we ourselves act either through our own reasoning which springs from our own habits and the conclusions we draw from our own concepts and judgments, or through the influence of either a good or an evil spirit. In this way we form various projects and convictions which are not coming immediately from God our Lord. Hence these need to be very carefully examined before they are fully accepted or carried into effect.”* (SE §336)

What seems to be implicit in the *Rules for the Discernment of Spirits* is the need to conduct oneself by use of a particular type of knowledge, which requires careful examination based on the individual’s own knowledge. The individual knowledge can *“form various projects and convictions which are not coming immediately from God our Lord”* (SE §336), calling for the need to discern the nature of such projects and carefully examine the way they touch the soul. It is the assertion that the individual’s knowledge cannot be aligned with the knowledge required to achieve conformity with God’s will that opens the pedagogical possibility: individual conduct, through the acquisition of a special type of knowledge, can be tailored.

The Exercises are therefore to be practised with the help of what is called the Spiritual Exercises Director, someone who assists the subject in the discernment of spirits, drawing heavily on his own knowledge of the inner movements of the soul. Ignatius wrote several instructions for the use of the Spiritual Exercises Director (Palmer 1996)⁷³ which make clear some of the points mentioned before. The first week of the Exercises, as described before, has the objective of confronting the individual with what is considered to be wrong from the Catholic Church's ethical point of view. Therefore, the meditations of the first week should be aligned with the state of the individual's soul in what concerns sinful action: *"In the First Week not much is needed in the case of persons who are advanced in the way of the spirit and who have long been going to confession and Communion, and who wish to find out in which state they can best serve God. Indeed, if it is possible they should complete their general confession and the whole First Week in four or five days. The opposite holds for those who are less well disposed. To bring them to lament their sins and understand how serious a matter it is to have offended God, they can be given additional exercises, such as on death, the particular Judgment, the general judgment, etc."*⁷⁴. The first week of the Exercises bases its meditations on the general ethical principles of the Catholic Church. In this sense, what is proposed to the individual is a confrontation of his own life with those general ethical principles, so that a first type of decision is taken: the decision to undertake an ethical life, coherent with a set of general ethical principles. The transition to the second week of the

⁷³ The transcriptions used from the original work of Ignatius of Loyola follow Palmer's (1996) edition.

⁷⁴ On How to Give the Exercises in the First Week, Ignatius of Loyola's original manuscript, §8

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Exercises is done through the first meditation of the first week, on the Principle and Foundation, which aims at fostering the individual's indifference towards any possible state of life: *"A path should be opened for him as follows: "To help you understand the problem of making an indifferent use of the means God our Lord has given us so that we can reach the end for which he created us, and so that after grasping this you will place yourself unreservedly in his hands, since this is the foundation for finding what we are looking for, consider the following: There have been persons who took the path of religious life and did not persevere in it but refused to bend to the sweet yoke of the Lord, and have consequently gone to hell because they abandoned religious life and through their own fault died apostate. Others entered religion after having been unable to live in the world without sinning and offending God or without failing to make much progress in the Lord etc., and they reached sanctity; if they had married they might have gone to hell. Similarly with all the other states of life, one after another: some who possessed riches have earned heaven, others who possessed riches have earned hell. Since this is so, and since the evil does not stem from the state itself, it certainly comes from our side in embarking on things unthinkingly and inclining our minds without reflecting whether this is right for the service of God, whether it is my calling, whether this is the best path for me to travel and so reach the end for which God created me. Not everyone can be religious."*⁷⁵

The decision to be taken on the second week of the Exercises is one that concerns either a state of life or a major issue. However, following the three ways to make an

⁷⁵ On How to Give the Exercises in the First Week, Ignatius's original manuscript, §21

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election described above, one is confronted with some important philosophical/ontological questions: how is it that the individual can achieve certitude on which decision to take?; what is the object of such decision and how is it revealed by God himself?; what is the relation between a decision to follow general ethical principles, which is the aim of the first week, and a decision that is related to a state of life, which is not ethical by nature? An attempt to answer these questions has been provided by Rahner (1964), and is based on the following reasoning. The ethical conduct proper of the individual after completing the first week of the Exercises is based on the application of “*general principles of morality with positive content (a universal material value-ethics)*” (Rahner 1964, p. 112). However, the decision to be taken on the second week is not based on general ethical principles, because one cannot classify as being more ethical or not to become, for example, either a doctor or a priest. The type of decision that is to be taken on the second week is not, therefore, based on ethics but on the knowledge of the individual: the Exercises are “*an attempt, especially in the Rules for the Discernment of Spirits, to provide and give practice in a formal, systematic method of discovering this individual will of God*” (Rahner 1964, p. 115). The main ontological problem extracted from the reading of the Exercises is the question of how God manifests his will to an individual: “*it is to a certain extent ex definitione a matter of acquiring certainty about the quality of an occurrence in the soul which comes ‘from outside’. It is precisely the certainty about its own nature intrinsic to the experience itself which is to be checked, made explicit and accounted for*” (Rahner 1964, p. 128).

The Rules for the Discernment of Spirits, presented previously, are to be used so that God's will is discovered. The fact that the movements of the individual soul, characterised as either consolation or desolation, do not refer to psychological phenomena such as modern sentiments is of the utmost importance to understanding the full philosophical scope of the Exercises. From the philosophical and theological point of view, Ignatius makes, with the Exercises, an extraordinary breakthrough: God can manifest his will to an individual by means of consolation and desolation movements of the individual's Soul. However, this assertion must not be confused with either the modern notion of autonomous individual conduct, or traditional mystical experiences. Although Ignatius recognises the possibility of a mystical revelation of God's will, which is implied in the first mode to make an election, it is clear that he considers the second mode of making an election the most common (Rahner 1964). This means that the Exercises are a decision-making mechanism that is underpinned not in mystical revelation, but on the examination of the movements of an individual's soul. The field of application of the Exercises is therefore the individual as the particular instance of God's will. This is a major shift, since self-mastered subjects and mediaeval religious subjects had their individual conduct shaped according to knowledge of moral universals. The subject drawn from the practice of Ignatius's Exercises has his individual conduct shaped according to the knowledge of each individual (Rahner 1964).

Critical Discussion

This chapter will critically analyse the Society, enlightened by the main characteristics of its government mechanisms addressed in the preceding chapter, and the theoretical framework devised previously, along three main aspects. The first addresses the administrative principles of the Society and the counter-discourse they originated; the second aspect relates the use of correspondence with the need to control at a distance and the third analyses the distinctiveness of the Society's practices, and relates it to governmental forms of power.

9.1 Administrative Principles of The Society of Jesus

The so-called administrative principles of the Society were conceived by Ignatius, taking into consideration the preservation of organisational unity and the achievement of a balance between the need for centralised administration and local adaptation (Friedrich 2009). These two administrative principles reflect the distinctive character of the Society as a global entity (Clossey 2008). Since the Society had its members working in many different countries, Ignatius envisioned the need to setup procedures that would guarantee organisational unity and local adaptation to different cultures. It is around these two administrative principles that the Society designed its governance mechanisms. However, some of the main governance mechanisms were not new to religious organisations of the sixteenth century, specifically the centralisation at the Curia (in Rome), the creation of the office of General and the institution of General Congregations. Although some of

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these administrative institutions were already in place, Ignatius gave them a new meaning through the interpretation of the role they should play in the administration of long distance operations. It was the long distance character of the Society's administration that fostered an innovative interpretation of traditional religious practices.

Besides the new interpretation of established governance mechanisms, the Society also introduced a new governance mechanism: the network of administrative correspondence. This network was not used as a governance mechanism in traditional Religious Orders, but was common in the mercantile world, the Protestant communities and the diplomatic world, mainly the Papal Nuncios (Friedrich 2009). In a letter dated 17th of July 1547 to the Society, Father Polanco explicitly mentions the influence of the governance mechanisms of the mercantile world and the Protestant communities in the establishment of the Society's correspondence network. According to Friedrich (2009) there are two characteristics of the modern political world that might have influenced the implementation of the correspondence network: the idea that political bodies could be manipulated by governmental activity and planning, and the growing appreciation of information to sustain decision making. In the sixteenth century the governance of political institutions relied on standardised correspondence that guaranteed the quality of information (Vivo 2007), and therefore it is possible that this practice was absorbed by the Society:

“If we observe constantly what is happening in different regions of the world, we will be able to focus on the crucial problems and attend to them in a special way.

*Although we can achieve something in a certain region, the same means could achieve much more somewhere else. This, however, escapes us if we are not constantly informed about all events in all regions where Jesuits are active.*⁷⁶

This citation from the letter of Father Polanco illustrates the importance of information in the governance of the Society. It is vital for the Society to have a thorough overview of all activities, members and cultural particularities. In this sense, according to Friedrich (2009), the Society is aligned with a modern cultural context that favours a panoptic view that is necessary for good government. Such a metaphor is typical of modernity (Cosgrove 2001), and used at least once by General Acquaviva in a letter to the Society, dated 3rd July 1602: “quasi da un’alta torre potiamo in un occhiata perveder lo stato della Religione”⁷⁷.

The importance given to information gathering to achieve efficiency is also typical of modern culture, with considered counting as a favourite tool (Glimp and Warren 2004; Friedrich 2009). The Society, in the letters that were sent to the Roman Curia, counted all the members and their activities, discriminating the latter in terms of number of confessions, conversions and sermons (Friedrich 2008). Father Polanco and Ignatius, therefore, associated good governance with centralisation and good

⁷⁶ Polanco to the Society, 17th July 1547. Cited in Friedrich, M. (2009). "Governance in the Society of Jesus 1540-1773 - Its methods, critics and legacy today." Studies in the Spirituality of Jesuits 40(1).

⁷⁷ “Roman Curia is sitting on a high tower and is thus able to take in the status of the entire Order with one single glance”. Cited in Ibid.

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information gathering mechanisms. According to Friedrich (2009) even the fourth vow to the Pope is related to the superior information base of the Vatican:

“Our reason for thus placing ourselves at his disposal is that we know that he has a better knowledge of what will be profitable for the universal Church”⁷⁸.

This statement strengthens the hypothesis that, for Ignatius and Father Polanco, perfect governance is associated with an overview of all the organisation’s activities and with the quality of the information gathered.

The Society has as one of its most characteristic dimensions of the particular “way of proceeding” a constant drive for perfection in everything. This is expressed by the term “*Magis*”, which means “more”. The relevance of the “*Magis*” for the understanding of the principles behind the determination of how the Society should govern itself are made clear by Friedrich (2009), according to whom “*Magis*” means the thorough planning of all activities, the careful balancing of the different options before a decision is taken, the use of the faculty of imagination to construct alternative outcomes of the decision taken and the need for a total overview of what is happening in order to decide.

The government of the Society depends, in this sense, on informed decisions. The more informed the Superior is, the more effective the government of the Society will be. It is because the Superior has more information that the government is centralised

⁷⁸ Ignatius of Loyola to Jaime de Gouveia, Rome, 23rd November 1538

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(Friedrich 2009), since he is in a better position to take good decisions (§668). The Society organises decision making through regulated routines and standardised writing so as to be able to coordinate at a distance (Friedrich 2009), as General Gianpaolo Oliva declares in a letter dated from 1666 and translated by Friedrich (2009, p. 13):

“The General, like the highest mover [supremum agens], must keep moving the huge body of our order which is extended over the whole world. And if he is unable to close the gap between himself and the faraway lands he is useless to this task. [Closing the gap is necessary] because all philosophers deny that action through distance is possible [actiones in distans dari abnuant]. [...] [Our only resource is] the loyal and sincere diligence of our administrators which, through the means of ink and paper, is able to connect Orient and Occident and moves both Indies closer to Rome. This [administrative] diligence covers geographical distance to the degree that it depicts our faraway brothers in real likeness and makes them better known to our administrators here as if they were present.”

The information received by the Superior must be trustworthy. The importance of trust is accentuated by the cultural context of the 16th century, since by then the use of *“written reports conveying information that was not gathered personally by the decision makers must thus be seen as a conscious decision which was far from self-evident at the time”* (Friedrich 2009, p. 13) because eye witnessing and personal testimony were considered superior to written reports. This explains the need to formalise as much as possible the correspondence. The importance given to

correspondence as a coordination mechanism is expressed by the fact that only a small fraction of the letters sent to Rome (and going out from Rome) has a spiritual purpose (Bertrand 1985).

It is thus clear that, in the context of the sixteenth and seventeenth centuries, the understanding of the Society as a reality and not as something dispersed is achieved through writing practices (Friedrich 2009). The importance of trust to coordinate geographically-dispersed activities is also patent in the creation, by the Society, of the office of Assistant, which represents an innovation in the structuring of a Religious Order (Friedrich 2009). Until 1773 the Assistants of the General were not as global as today. In fact, in 1558, in the first General Congregation, there were only four General Assistants: for Germany, Italy, Spain and Portugal. In 1608, the office of Assistant for France was created, and in 1755 the Polish office. This division in assistances reflects the geographical division of labour at the Roman Curia, whereas at the local level the division of labour is made according to tasks and functions. This division at the Roman Curia is also innovative insofar as, for instance, the Papal Curia had been divided along Congregational lines since 1558.

The General Assistants supported the General's decision making by, amongst other things, reading all the correspondence sent to the Roman Curia. Besides the General Assistants, the Provincial also played an important role in information gathering since he was an eyewitness to what occurred in his Province. The Provincials were always, throughout all the Society's history, those who travelled extensively to gather

information to send to the Roman Curia. Nowadays the General Assistants still travel extensively to retrieve information.

The administrative theory of Ignatius and his several options were not accepted without opposition. Juan de Mariana, a member of the Society, was the leading inside critic of the options taken by Ignatius and Father Polanco. The criticisms put forward by Juan de Marian were as follows:

- 1.As happened with all other Catholic Religious Orders, the Society should have regular General Congregations.
- 2.The General Assistant's office should be strengthened to thoroughly control the General and to help decentralise the Society's form of government.
- 3.The Provincial Congregations should have more powers to help in the decentralisation process he advocated.
- 4.The creation of a Cardinal Protector of the Society at the Papal Curia.

These suggestions rely on the assumptions of Juan de Mariana on human nature and on how to govern an organisation that has geographically-dispersed operations, with an exponential increase in the number of its members. For Juan de Mariana, the governance mechanisms envisaged by Ignatius and Father Polanco would not be able to contend with difficulties related to organisational change, either in terms of number of members or dispersion of activities (Friedrich 2009).

In his *Discurso*, Juan de Mariana clarifies what were the main beliefs underpinning his proposed administrative solutions for the Society. Chief among those beliefs was his distrust of human nature, which he considered to be fallible. That is why he criticised the use of correspondence and the highly-centralised structure. To overcome these governance problems, the Society should trust less on written reports and more on the judgement of the Provincials, who were the only ones who had direct access to what occurred in their Provinces. According to Juan de Mariana, the Roman Curia was far away from the Provinces. Besides this, Juan de Mariana acknowledged that social bodies must adapt to change, namely size: “*One cannot govern 10 000 men the way one governs 600*” (Friedrich 2009, p. 32).

Juan de Mariana was also critical of the graduation system of the Society, which he found complicated and not aligned with the two most important motives for human action: fear and hope.

The critical voices regarding the governance mechanisms of the Society were related to three main issues (O'Malley 1993):

1. The novelty of some of its governance mechanisms, such as the election for life of the Superior General and non-existence of regular General Congregations, which provoked critical opinions from the hierarchy of the Catholic Church.
2. The elimination of monastic dressing, of regular singing and of regular communal prayers were among the most criticised innovations of Ignatius. According to

Ignatius and Father Polanco, these changes in the way of life that used to characterise all Religious Orders were related to the fact that the members of the Society should adapt themselves to the local customs of the place in which they were residing, and to the need to be free to go anywhere they were needed, which was in contradiction to all the common rules in a Monastery designed for the permanence of all monks in the same physical place.

3. The belief in different assumptions for the design of governance mechanisms, which is what differentiated Juan de Mariana.

It is relevant, therefore, to clarify the nature of the main governance mechanisms in the Society, so that a thorough understanding of the reasons behind their creation is achieved, taking into consideration the main objective of these governance mechanisms: balanced, centralised decision-making in the Roman Curia, while not compromising the local autonomy crucial for the success of the Society' missionary endeavours.

9.2 Control at a distance

As clarified previously, the office of Provincial implies sending several standardised letters, containing different types of information, to the Roman Curia. These types of letters are:

The annual letters. These letters are supposed to provide an account of the Society' accomplishments in each Province. The main purpose of the annual letters is the edification of all the members, fostering organisational unity (Friedrich 2008).

The *informationes ad gradum*. These letters provide information on each member of the Society and have as their main objective informing the decision related to the progression of a member to a higher grade in the organisation.

The *informationes ad gubernandum*. These letters are used whenever there is the need to choose a Superior. The process for electing a Superior has described previously.

However, besides the standardised letters, any member of the Society can, and in fact should, write about everything he finds useful and worth informing his Superior of. Aligned with the above-mentioned caution regarding the possible pitfalls induced by human nature, and to assure that all the relevant information is received by the General, any member of the Society can send a letter directly to him. To do so, the Jesuit must write on the envelope the Latin word "*Soli*" (meaning that only the General can open the letter), guaranteeing with this procedure the reception of the letter (Friedrich 2007).

The usage of letters for control at a distance raised one main difficulty: letters took too long to reach their destiny, if they reached it (Clossey 2008). Due to this

difficulty, and given the rising number of reports on misbehaviour occurring in the Asian missions, the Society adopted new measures to ensure control at a distance (Costa 1998). Two main solutions were devised to deal with this: the Provincial of foreign missions should be of European birth, preferably, and should have studied theology at a European university (Alden 1996; Clossey 2008; Friedrich 2009). The focus on the academic training of the Provincial is clearly aligned with the centralised form of government that characterises the Society. According to the historian Oliveira e Costa (1998), one good example of the concern with the Provincial arose after reports, sent from the Japan, which claimed that the local Provincial was not behaving properly. The letters reporting this situation took more than two years to reach Rome, and the letter sent from Rome to Japan, dismissing the Provincial, took another two years. This meant that the Provincial governed the Japanese Province for five years whilst not behaving properly. Although the letters continue to be a mechanism to control action at a distance within the Society, the long training period to become a Professed member and the obligation to study theology at a European university became important mechanisms of control (Friedrich 2009). However, this practice brought some criticism due to the acknowledged preference for European nationalities (Alden 1996; Clossey 2008).

Correspondence does seem to have been used as a control mechanism and as one of the main governance mechanisms of the Society. Its relevance was twofold: on the one hand, correspondence guaranteed that the General did “see everything”; on the other hand, correspondence was used for the retrieval of information on Jesuits still in training, so that only those that were fit could be elected as Professed members.

The election of a Professed member was always crucial for the Society. The exponential growth of the Society between the years 1540 and 1580 led to a lack of Jesuits capable of being elected as Professed. However, even during that period the Society never adopted the practice of electing a Superior who was not a Professed or of electing as Professed someone that was not trustworthy (Padberg, O'Keefe et al. 1994; Clossey 2008). The three main administrative principles of Ignatius and Father Polanco described earlier, which are trust, centralised decision making and extensive use of correspondence, are therefore clearly aligned with each other and with what was stated during the analysis of the Constitutions, leading to the assumption that trust is the cornerstone of the administrative principles of the Society. Not only those that are conducted must trust their Superiors, but the latter must also trust the Professed members for whom they are responsible. This form of trust, symbolised by the “way of proceeding” referred to extensively in all the relevant organisational documents of the Society, was not present in Monastic forms of life. Religious Orders founded before the Society also did not have election mechanisms for their Abbots or their Superiors that were as formalised as those of the Society (Moulin 1955; Moulin 1964). These aspects, together with the degrees of incorporation into the Society, are among the most important innovations introduced by Ignatius. All these factors lead to the conclusion that a new form of Pastorate was envisaged by Ignatius and Father Polanco when they wrote the Constitutions of the Society, which will be analysed in the following section.

9.3 From the Pastor to the Superior

In traditional Monasticism, the Abbott's main duty was to guarantee that the Rule was being followed and that every detail of the daily schedule of activities was fulfilled according to a timetable. The example of night vigils, where it was difficult to know the time for praying with accuracy due to the lack of clocks, might be enlightening in understanding the difference between the Society's approach and that of other Religious Orders. The solution of many Monasteries to this problem was the appointment of Monks to stay awake, in shifts, until the time of the praying (Lawrence 2001). By doing so, the Monastery obviously allocated several human resources just to assure that the stipulated timetable was followed, following, therefore, God's own will. This is precisely the type of compromise that Ignatius wanted to avoid. The Jesuit must be freed from traditional practices so that he can be in a constant state of availability for any mission.

The Abbott was not responsible only for the accomplishment of the Rule. His functions also comprised the administration of the Monastery, being the main intermediary between the Monastery and the exterior world. However, the fact remains that the Monastery was a defined geographical territory, and the Abbott's functions were confined to the Monastery. Although several Religious Orders before the Society started to adopt what Knowles calls a "transnational" character, moving beyond the Monastery, none was as global as the Society (Knowles 1966; Clossey 2008). The following paragraphs will show the importance of the changes in the

management of everyday life for the adoption of a new form of leadership, which led to a major shift in the deployment of Pastoral power in the Society.

Ignatius only determined two daily obligations for any Jesuit: the daily examination of conscience (§342), and the meditations, based on the Exercises, for one hour (§343). It was Ignatius' understanding that compulsory communal ways of praying would make the member of the Society less available for the missions. Of special relevance to Ignatius was the practice of Exercises, amongst which are various forms of meditation, and the daily examination of one's conscience. Although other forms of praying can be replaced or abandoned should the member of the Society not have time to do them or, for instance, his health conditions did not allow him to pray or attend Mass, the Examination of Conscience must be done whatever the circumstances. Either through the practice of the Examination of Conscience or through the practice of other forms of meditation, the Society's main mode of praying is clearly centered on the Exercises, believed to induce an "inner-rule", rather than an external Rule, commonly referred to, in the Society's organisational documents, as the "way of proceeding". The emphasis placed on the "way of proceeding" raises one central question: how is it possible to assess if a Jesuit is behaving according to the "way of proceeding"? The answer to this question is directly connected with how the Society elects its Superiors.

The analysis of the Constitutions presented before reveals the importance of the election mechanisms of either a Superior or a Professed. All other Religious Orders had the degree of Professed. However, unlike the Society, the Profession was due one

year after entering the Religious Order and upon completion of the novitiate. As clarified before, this was not the case in the Society. The identification of the Society, as a body, with those that are Professed is crucial to understanding the coherence inherent to all the governance mechanisms. Although a Superior must be a Professed, not all the Professed will be Superiors. However, after a close reading of the Constitutions, it is clear that the qualities of a Professed are quite similar to those required to become a Superior. What is the main distinction, therefore, between a Professed that will be capable of being elected as a Superior, and a Professed that will not? The difference is clearly the following: whilst a Professed is supposed to behave according to the “inner-rule” of behaviour, the Superior must, besides also behaving according to that rule, be capable of leading the Society towards its mission, guiding those under his responsibility so that the Society grows (as defined in the tenth chapter of the Constitutions). This is probably the main difference between the Superior of the Society and the Abbot of traditional Monasticism. The Abbot did not have as a mission the expansion of the Monastery, just the guidance of those living under his responsibility. This detail of Monastic forms of life must be cross-analysed with other aspects of the Abbot’s election: unlike the Provincial Superiors of the Society, the Abbot was elected for a life term by those living in the Monastery. The centralised election of the Provincial by the General, supported by information retrieved from the Province, prioritizes the need for continuously monitoring the behaviour of all the Jesuits, so that when the time comes the General has the required information to elect a Provincial.

The question of how to evaluate and measure the “way of proceeding” of the Professed remains unanswered. An attempt to answer this question will be made here, following a line of reasoning in accordance with the notion of wisdom.

Wisdom has as its main characteristic the fact that it is not learned but acquired, and although Aristotle and Aquinas associated wisdom with knowledge, they were referring to philosophical knowledge: the wise is the one who is proficient in “first philosophy” (theology). For Aristotle and Aquinas, wisdom is either practical or speculative: the former is also called prudence, and the latter is what is understood as wisdom (Price 1996). Therefore, in ancient and mediaeval thought, wisdom seems to be related to behaviour (prudent behaviour) and God (metaphysical knowledge). Following this line of reasoning, the understanding of the relation between practical and speculative wisdom might enlighten the characteristic dimensions of what could be called a particular form of conduct, typical of Christianity.

Christian theologians do not hold the notion of practical wisdom in contempt. Aquinas and Augustine contended that practical and speculative wisdom are both directed towards human conduct: the wise individual is the one who directs his conduct according to the ultimate goal of salvation. Practical and speculative wisdom are therefore intrinsically related, in the context of Christian thought, insofar as the wise imitates and knows God. The possibility of imitating God and particularly Jesus Christ is the mainspring of anchorite and eremitical forms of life, which produced Monastic forms of life around the figure of the Pastor.

From their inception, all Religious Orders reflected on how to elect an Abbot or a Superior to administer the ordinary and spiritual lives of each monastery. The underpinning principle of every election mechanism was the recognition that the Abbot should be someone whose behaviour was a model for any religious way of life. In this sense, the Abbot could be someone considered to be wiser, insofar as his behaviour was in accordance with what was prescribed for the conduction of a religious way of life, and he should be knowledgeable about theology (the two dimensions of Christian wisdom referred to above). For the sake of rigour, one must clearly state that the latter affirmation is highly questionable for two main reasons. On the one hand, modern forms of Religious Orders are an achievement of sixteen centuries of evolution; on the other hand, different Religious Orders chose different election mechanisms for the election of their Abbots and their Superiors. Therefore, in the context of the present research, the approach to the election mechanisms of the Abbots or Superiors will be underpinned by a theological approach to wisdom and its relation to conduct.

Wisdom is closely associated with behaviour. However, wisdom cannot be misused insofar as the wise are supposed to always behave wisely. From this assertion several questions can be put forward: what is the distinctive character of wise behaviour?; what type of knowledge underpins wise behaviour?; how does the individual acquire the type of knowledge that fosters wise behaviour? The wise can possess many types of knowledge, and misuse them, but they cannot misuse the type of knowledge associated with wisdom: the wise always behave wisely.

Ancient forms of wisdom, derived from the writings of several philosophers, treat wisdom as the characteristic of those who are virtuous and knowledgeable. Socratic and Platonic approaches to wisdom point to the relation between virtue and knowledge. Plato claimed that the individual must fully develop as a rational and moral subject, whose main characteristic is moderation. It is moderation that will grant the individual true happiness, closely associated with the acquisition of the supreme good. What is it that turns individual life into a good life? Is it the measure of pleasure? Socratic and Platonic ethics do not consider pleasure to be the measure of goodness. The dual conception of the human subject that distinguishes Socratic and Platonic ethics considers that the individual is constituted of a body and a soul, and that both must be taken care of so that moderation is achieved. The supreme goodness of life is therefore achieved when the individual moderately mixes his need to satisfy his corporeal needs as well as his spiritual needs. In this sense, the contemplation of the ideal forms already opens the possibility of considering a good life to be the one that resembles the ideal life of God. The ideal life of God is the model for a virtuous earthly life. This means that a good life is achieved through the practice of virtue.

However, for Socrates and Plato virtue is identified with knowledge. The immoderate individual is the one who pursues that which is bad for him, while the moderate individual pursues that which is good for him. Since good is pursued only by those who know it, then it is not possible to separate virtue from knowledge, since they are the visible sign of the knowledge about what is good. It is this identification of virtue with knowledge that opens the possibility of learning virtuous behaviour.

In *The Republic* Plato⁷⁹ distinguishes four cardinal virtues: wisdom, fortitude, moderation and justice. Wisdom is the virtue of the rational part of the soul; fortitude is the virtue of the irascible part of the soul; moderation consists of the unification of the irascible and appetitive parts of the soul, under the government of reason; justice is a general virtue that occurs when each part of the soul does what is supposed to do. All the four virtues are unified by prudence, which consists of the knowledge of what is really good or bad and of the practical means to achieve it.

The fact that virtuous behaviour can be learned leads to the assumption that the individual only opts for what is bad *sub specie boni*: when the individual desires something that he considers to be good, although it is bad. In this sense, and given the high status that wisdom has for Socrates and Plato, these philosophers never say that the philosopher is wise, but that he is the one who loves and longs for wisdom. The “philosopher-king”, who in *The Republic* should rule the city, is someone who loves wisdom, not necessarily the wisest. However, the assumption that the one who governs should be wise will perdure and have its influence on the organising principles of the religious “ways” of life of Western tradition.

Plato defines wisdom as the virtue of reason (the part of the soul which is identified with the faculty of knowledge) which has the function of directing conduct and of contemplating the truth present in the ideal world. The wise one is, in Plato’s thought, he who is able to rule the three parts of his soul in harmony. Therefore,

⁷⁹ *The Republic*, L. IV.
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although the virtues of moderation, fortitude and justice are to be present in the individual who rules (either himself, or his family or the state), wisdom is the ruling virtue. Wisdom does seem, therefore, to be closely engaged with action and conduct, as opposed to the world of ideal thought.

Another major contribution to the understanding of wisdom is provided by Aristotle. Aristotle's ethical philosophy is clearly teleological, insofar as it states that a good action is one that leads to what is good for the individual. As for Socrates and Plato, Aristotle also considers that what is good for the individual leads to happiness, which is only achieved by the practice of virtue. However, unlike Plato, Aristotle does not consider virtue only from the moral point of view, but distinguishes moral virtues from intellectual virtues. All the virtues, according to Aristotle, are a means in the ontological sense, which opens the possibility for the use of virtues in different circumstances of life.

Aristotle, unlike Socrates and Plato, does not regard wisdom as a virtue proper of the world of ideas. Aristotle identifies wisdom with philosophical knowledge, and especially with the highest form of knowledge which is theology (what Aristotle also denominates as "first philosophy" or "metaphysics"). Aristotle does consider that the philosopher can attain wisdom insofar as he makes a distinction between philosophical or speculative wisdom and practical wisdom. The latter is associated with the virtue of prudence, whilst the former is wisdom in its pure signification.

By separating wisdom from prudence Aristotle places wisdom outside the group of moral virtues. Wisdom is a virtue only in the order of intellectual excellence, not in the order of moral excellence. However, this only makes sense considering the distinction between philosophical and practical wisdom, *id est*, between wisdom and prudence. On the one hand wisdom, being an intellectual rather than practical virtue, is concerned only with the highest forms of knowledge that can make an individual truly happy; on the other hand prudence, or practical wisdom, is concerned with those things that are proper of moral conduct and which are eligible by the individual. That is why Aristotle will identify wisdom with the knowledge of the first principles and causes, known as theology or metaphysics.

Drawing upon Aristotle, Thomas Aquinas would adopt the distinction between philosophical and practical wisdom. However, following the Christian doctrine, Thomas Aquinas would identify metaphysics with the sacred Christian doctrine based on divine revelation. The possibility of divine revelation is of utmost importance in understanding the Christian notion of wisdom as related to conduct and, *a fortiori*, to the pastoral form of power. Thomas Aquinas distinguishes the wisdom of the philosopher from the wisdom of the Christian individual: whilst the wisdom of the philosopher is linked to knowledge (as in Greek tradition), the wisdom of the Christian, being underpinned by revelation, is linked to the knowledge of God's will and, therefore, to individual conduct according to divine will. This does not mean, however, that the accounts of wisdom proper of Greek philosophers are held in contempt by Christian theologians such as Thomas Aquinas. The most important dimensions of Christian accounts of wisdom are its close relationship with

individual conduct, and the possibility of an individual revelation of God's will. Christian wisdom does resemble previous accounts of wisdom insofar as the wise is supposed to judge and order his life according to a superior form of knowledge. However, the superior form of knowledge proper of the wise is revealed in propositions that constitute the official doctrine, and individually as a means to properly conduct life. These two elements of Christian wisdom are at the basis of pastoral forms of power.

From this short review of traditional accounts of wisdom, one can begin to grasp how wisdom became one of the organising principles of the Pastorate. The relationship between wisdom and knowledge is not only related to pedagogical practices, but also to desire, insofar as the wise man desires what is good and only misguides his life in case he takes what is bad as being good (the subject always conducts himself *sub specie boni*). The possibility of acquiring knowledge of what one should desire is behind the relationship of the masters with the disciple, being that self-mastery is the cornerstone of an autonomous behaviour in relation to the master. However, one question, amongst many others, remains unanswered: how does one measure wisdom? Foucault (1990, p. 14), while discussing various forms of dreams, does describe how, based on the type of dreams, the Greeks made virtuous behaviour accountable. Although one might contend that this type of practice, by determining what one says and therefore conditioning what the discourse refers to, will somehow underpin pastoral forms of power, the fact remains that it does seem to be the Master who determines if the disciple has grown in wisdom. The wise form of

conduct is controlled by the subject's peers. The latter is what seems to be one of the most fundamental organising principles of the Pastorate.

As clarified earlier, it is in the cenobitic organisation of the fourth century that the first techniques of exploration and knowledge of the Self emerge - the Examination of Conscience and the Confession emerge as the main apparatuses of Pastoral Power. These two practices were properly articulated in Christendom, forming the basis for the need to report to someone else, through obedience, and the need to report to oneself through the Examination of Conscience. Obedience and the Examination of Conscience are required to achieve the *Discretio* of spirits. Antiquity saw in Wisdom the way to exercise power over oneself. Christian *Discretio* differs from Wisdom in that it is not related to the subject's independence, rather to the belief that the soul is not capable, by itself, of achieving the necessary discernment to distinguish good from evil. It is to compensate the subject for the natural lack of discernment that the Examination of Conscience and the Confession are formed.

This lack of discernment, together with the presence of bad thoughts, may lead the soul to condemnation. Impure thoughts were something believed to be used by the Devil to tempt the anchorites: living in the desert, with no other source of temptation, the Devil chose thoughts to try to deflect the anchorites from the path to Salvation. The source of Evil is, in this sense, within the subject. The fight between Evil and Good is fought in the subject's interior. The Wisdom proper to Antiquity was related to the domination of oneself and over exterior objects through will. In Christendom, *Discretio* is the control over what lies inside the subject. The examination of

conscience is therefore supposed to be more related to interior movements of the soul than to exterior actions. The Sacrament of Confession is not only the enumeration of one's faults, but a tool used by the monk to eliminate bad thoughts. Through the verbalisation of every thought, the Sacrament of Confession is a mechanism to analyse thought.

As regards the Society, the class of qualities required by the Superior General and by the Superior Provincial are the same. These qualities, varied in nature, are however related to three types of virtue (Aldama 1989): regarding oneself, with relation to subordinates and those related with the nature of the office. Although all the virtues are important, prudence does merit special attention in the Constitutions, being treated as an intellectual quality in accordance with Saint Thomas Aquinas' own treatment of this particular virtue (Aldama 1989). As virtue, prudence has a twofold function: to rule oneself and to govern a multitude. In this sense, the criteria used to elect those who will govern the Society are closely associated with the distinction between philosophical and practical wisdom, as previously clarified.

Number 729 of the Constitutions is clear in its distinction between prudence and wisdom, as conceptualised by Classical and Mediaeval thinkers, and as required by the superiors of the Society. However, prudence and wisdom should be, when approached as virtues required by those who govern the Society, closely associated with discernment and discretion (Coupeau 2010). Discernment refers to the capability of discerning spiritual matters, whilst discretion refers to the judgment of external matters.

The discernment of the movements of the soul is what the spiritual direction of the soul is for, which, together with the practice of Confession, underpins the Pastorate as defined by Foucault (2009). In the context of the Pastorate, the discernment of spirits and the knowledge required to attain a good judgment in spiritual matters are to be used for the government of the subject. However, the judgment of external matters, associated with the quality of discretion, is, according to the Constitutions of the Society, used for the government of the entity. In this sense, the Superior in the Society appears as distinct from the Pastor. Although the Pastor is supposed to also guide the “flock” (Foucault 2009), the main focus of the Pastorate is the salvation of the individual subject. When discussing the Pastoral form of power, Foucault addresses practices that are related to individuals (such as the Confession and the Spiritual Direction) and not to any form of multitude. That is why the distinction between discernment and discretion, as qualities that characterise the prudent (in the sense of practical wisdom) is of utmost importance in understanding the apparent difference between the Pastor and the Superior in the Society.

The notion of wisdom is extended to incorporate, in its practical sense, the possibility of prudently governing different forms of multitude. As stated before, although Thomas Aquinas had already distinguished the virtue required to govern different forms of multitude, that had not been translated into a constitutional framework for the government of a religious body. The government of the Society, and the mechanisms to elect its Superiors, rely heavily upon the distinction between the government of the individual and the government of the entity. The qualities required

by the Superiors, and presented previously, are not aimed at the government of the individual, but at the government of the entity. This does not mean that the Pastoral form of power is not present, through its distinctive practices (Spiritual Direction and Confession), in the governance mechanisms of the Society. However, the shift entailed by the Society is twofold: on the one hand, more practices are envisaged for the government of the individual, which leads to a lengthy training period before any member of the entity becomes eligible for a governing role; on the other hand, the qualities required for anyone to become a Superior are aimed at the government of a multitude. The Superior of the Society is therefore clearly distinct from the Pastor, as defined by Foucault, insofar as he is supposed to govern a multitude, not individual subjects, nor a physically constrained “flock”, such as a parish or a monastery where “eye witnessing” could be practised.

The preceding sections clearly demonstrate how, through the deployment of several new practices for the government of the Society, Ignatius institutionalised a new way of organising, underpinned by three administrative principles: the formalised extensive use of correspondence, highly-centralised decision making and trust. These three administrative principles, developed according to Friedrich (2009) after a particular view of human nature, were also developed, as this thesis contends, due to a significant change in the conception of Pastoral power, which was inevitable, given the global nature of the Society. The Society was not founded to become a traditional Religious Order, but to become a body with a global mission:

“When based upon this foundation, the natural means which equip the human instrument of God our Lord to deal with his fellow human beings will all help toward the preservation and growth of this whole body, provided that they are acquired and exercised for the divine service alone; employed, indeed, not so that we may put our confidence in them, but so that we may cooperate with the divine grace according to the arrangement of the sovereign providence of God our Lord.” (§814)

This excerpt from the tenth chapter of the Constitutions, entitled *“How the whole body of the Society is to be preserved and increased in its well-being”*, leads to the conclusion that Ignatius clearly understood the importance of deploying a set of governance mechanisms capable of conducting an entity with such a distinguishing mission. The impact of this in the Pastoral form of power and its possible relation to “governmentality” is the focus of the following section.

9.4 Charting the Society of Jesus

Foucault addresses Pastoral power almost exclusively from the point of view of the Pastor, and never from the point of view of the members of the flock. The members of the flock are conducted by the Pastor, but possible forms of resistance to the conduct of the Pastor are scarcely addressed by Foucault. This might occur because the relation between the Pastor and the flock is the resemblance of the relation between God and His people, which entails a particular mode of power centred not on any form of repression or hierarchy, but on care for the Other.

The description Foucault provides of Pastoral power is therefore centred on the description of the Pastor's duties towards the Other. The Other, in Foucault's account of Pastoral power is either the flock, the group, or each individual member, but always approached merely as the object of power (Brossat 2099). The Pastor, if approached as resembling God's particular form of relationship with His people, is therefore a model, where the structure of Pastoral power resembles the relation between someone that guides and the guided population (Brossat 2099). However, following the Pastoral model of power, the individual is supposed to be in a state of extreme obedience towards the Pastor. Obedience, in the Pastorate, entails knowledge of all inner-truth. Every thought, action or desire is made accountable to the Pastor through the Examination of Conscience, followed by the Spiritual Direction and the Confession. The type of knowledge that arises from these practices underpins the conduction of the each individual towards Salvation. The link between Pastoral power and the governmental form of power arises, therefore, from the type of knowledge that justifies the deployment of determined practices for the conduction of individuals and populations. "Governmentality" entails, in this sense, knowledge of each individual based on several forms of "objectivation" of the population and of each of its individuals.

Pastoral power, as well as the governmental form of power, relies heavily on the acquiescence of the individual. This autonomous acceptance of the Pastor's instructions is what distinguishes Pastoral power from other forms of power. Although acquiescence forms part of the relation of power, there still is asymmetry: there is no form of equality between the Pastor and the one he guides, because they

The Organising Principles of the Society of Jesus have access to different types of knowledge (Brossat 2099). Asymmetry and access to a different type of knowledge, and to more knowledge, are at the basis of Ignatius' three administrative principles. The asymmetrical nature of the relation between the Superior and the individual member of the Society underpins the highly centralised decision making. As for trust and the extensive use of correspondence, the other administrative principles, whilst the latter is one of the mechanisms that give the Superior access to knowledge of the individual, the former is fostered by the belief that the Superior governs better if he knows more. All the practices deployed by the Society, either at the entity level or the individual level, are therefore intertwined. The government of the "body" is centralised in the "head", the General⁸⁰, because he has access to more knowledge of both the Society, as an entity, and of each individual member. However, although the relation between the Superior and the Jesuit remains highly asymmetrical due to the vow of obedience, the autonomous behaviour of the Jesuit, which fosters his acquiescence, also relies on a special type of knowledge, "existential knowledge" (Rahner 1964). The Constitutions and the Exercises, which underpin "existential knowledge", are therefore intertwined with the three administrative principles of the Society. The Exercises are immersed in the tradition of the *Devotio Moderna* piety (O'Malley 1993), whilst the Constitutions follow, in several aspects, the pastoral tradition of the Regular Canons. However, together, the Exercises and the Constitutions form the basis of the Society's spirituality.

⁸⁰ The terms "body" and "head" are used in the tenth part of the Constitutions. Jose Bento da Silva

The Constitutions do try to institutionalise the so called “way of proceeding”, that derives from the Exercises (Bertrand 1974), but that is what, to a certain degree, the Rules of previous Religious Orders tried to accomplish. The distinctive character of what the Society did lies, however, in the fact that previous Religious Orders relied mainly on the Abbot for guaranteeing that the Rule was being followed. The Society pursued a different approach insofar as the Constitutions follow a practice, the Exercises, that is aimed at the individual level. This means that the Exercises and the “inner rule” that is rooted in them are more important than the Constitutions as far as the “subjectivation” of the individual is concerned.

In the Exercises there is an inner movement that goes from the individual to a mystic body, through a social body. The individual, whose life is conducted in accordance with the supposed way Jesus Christ conducted his life, does so because he is a member of Jesus Christ’s mystic body, the Catholic Church. Each individual is therefore a part of Jesus Christ’s mystical body. However, the belonging to a mystic body is only possible through the membership of a concrete social body, the Society as a part of a larger social body that is the Catholic Church. The Exercises constitute the path that one must follow to become a part of a mystical body, as long as one desires “*to make all the progress possible*” (SE §20). Those who practise the Spiritual Exercises should account for their progress away from sin (SE §28-31), and engage in different practices to make “*the Exercises better and find more readily what one desires*” (SE §73-90). However, according to the Exercises, these practices of the self, amongst others, are not sufficient to attain membership of the mystical body. The Exercises do account for the need to engage in practices that foster the

The Organising Principles of the Society of Jesus membership into the mystical body. The most explicit rules concerning this are the famous “*Rules for thinking, judging and feeling with the Church*” (SE §352-§370): “*For we believe that between Christ our Lord, the Bridegroom, and the Church, his Spouse, there is the one same Spirit who governs and guides us for the salvation of our souls. For it is by the same Spirit and Lord of ours who gave the ten commandments that our Holy Mother Church is guided and governed.*” (SE §365)

The Exercises, as an individual practice, are therefore clearly related to the Constitutions as the organising document of the social entity. Ignatius did devise the Constitutions to be an instrument to govern a social body that, although in a sense mystical, is not detached from reality: the temporal dimensions of the body must be administered and are part of the mystical body (§322). The similitude between the path undertaken by the individual in the Exercises and in the Constitutions resides in the fact that both concern membership of a body. This is dealt with in the Constitutions in the sixth part, which analyses the individual conduct of the Society’ members, and in the seventh, which treats their conduct as related to others (§603).

The sixth chapter of the Constitutions, entitled “*The personal life of those already admitted and incorporated into the body of the Society*”, deals with the three vows of chastity, poverty and obedience that characterise the religious form of life. These three vows, as outlined previously, are common to all Religious Orders. However, the vow of obedience as understood by the Society is quite distinct, and is the most important for Ignatius. The vow of obedience is aligned with the global mission of the Society, as will be demonstrated in the following sections.

The innovation in the treatment of the vow of obedience, when compared with the exposition of its consequences in previous Religious Orders' Rules, is its placement in two different chapters - the sixth and the seventh. In the sixth chapter of the Constitutions, the vow of obedience is presented as part of the religious life of the incorporated member of the Society. Consequently, the sixth chapter of the Constitutions looks upon the relation between the Jesuit and his Superior vis-à-vis the principles of dependence and reverence. The principle of dependence is manifested in the following citation: *“Consequently, in all the things into which obedience can with charity be extended, we should be ready to receive its command just as if it were coming from Christ our Saviour, since we are practicing the obedience [to one] in his place and because of love and reverence for him. Therefore we should be ready to leave unfinished any letter or anything else of ours which we have begun, and in the Lord to bend our whole mind and energy so that holy obedience, in regard to the execution, the willing, and the understanding, may always be perfect in every detail, as we perform with great alacrity, spiritual joy, and perseverance whatever has been commanded us, persuading ourselves that everything is just and renouncing with blind obedience any contrary opinion and judgment of our own in all things which the superior commands and in which no species of sin can be judged to be present.”* (§547). As for the principle of reverence, the Constitutions state the following: *“Likewise, it should be strongly recommended to all that they should have and show great reverence, especially interior reverence, for their superiors, by considering and reverencing Jesus Christ in them; and from their hearts they should warmly love their superiors as fathers in him. Thus in*

everything they should proceed in a spirit of charity, keeping nothing exterior or interior hidden from the superiors and desiring them to be informed about everything, so that the superiors may be the better able to direct them in everything along the path of salvation and perfection.” (§551)

In the seventh chapter of the Constitutions, the vow of obedience is presented apropos the apostolic mission of the Society, and is intertwined with the availability that must be part of the “way of proceeding” of any Professed Jesuit: “(...) because the members of this Society ought to be ready at any hour to go to any part of the world where they may be sent by the sovereign pontiff or their own superiors (...)” (§588) The obedience vow is therefore presented as part of the obligation the Jesuit has, as regards his personal mission, towards the Pope and the General. This means that whereas obedience in the sixth chapter of the Constitutions is analysed at the individual level, in the seventh chapter it is part of the governance mechanisms of the entity. That is why the vow of obedience, when approached from the entity level, must always be directly connected to the Account of Conscience, as is clear in the following citation: “(...) *keeping nothing exterior or interior hidden from the superiors and desiring them to be informed about everything, so that the superiors may be the better able to direct them in everything along the path of salvation and perfection”* (§551). The distinction between the vow of obedience for the conducting of a religious form of life, made to an Abbot in traditional monasticism, and the vow of obedience for the conducting of an apostolic mission, made to the body of the Society, represented in the General, is one of the most important novelties introduced by Ignatius insofar as it represents a clear shift in the way Pastoral power was

deployed, although the Society apparently used the same practices, such as religious vows, as previous Religious Orders.

The governance mechanisms envisaged by Ignatius represent yet another “constitutional shift” (Knowles 1966), after the one introduced by Saint Dominic with the association of the legislative function with the regular general meetings (Moulin 1964; Knowles 1966). However, it is the contention of this thesis that the major shift occurred with the Constitutions of the Society because, unlike precedent Rules or Constitutions, the former devised practices for the conduction of either the entity or the individual with the sole purpose of conducting the “*corpus*” at a global scale (Clossey 2008), not specifying any territory over which power was to be exerted, and having as its objective the Salvation of every population known (Clossey 2008). Although the so-called “transnational” character of previous Religious Orders has been recognised (Moulin 1955; Knowles 1966; Moulin 1980; Lawrence 2001), the Society was the first Religious Order, and probably the first modern organisation, to clearly assume a global character as part of its mission, devising governance mechanisms for the conduction and control at a distance of globally dispersed members. The Constitutions of the Society not only represent a shift in the way Religious Orders are governed, but also point to the deployment of a governmental form of power. Following the governmental framework devised previously in the methodology chapter, one could classify the Society according to the practices deployed at the entity and the individual level.

At the entity level, the practices deployed by the Society include the extensive use of correspondence to retrieve information so that the grade of incorporation of each member can be determined (“*informationes ad gradum*”), the mechanisms for the election of Superiors and the Account of Conscience. At the individual level, the practices for the shaping of individual behaviour are the Examination of Conscience, the Meditations of the Exercises and the Exercises. All these practices rely on the “existential knowledge” (Rahner 1964) about the individual and on the technology of accounting, as explained in the following sections.

The Society, since its inception, has made use of accounting to classify its “population” of members. What strikes one as interesting is that the use of accounting is characteristic both at the entity level practices, and at the individual level practices. At the entity level, accounting is used based on information retrieved from the correspondence. At the individual level, accounting occurs mainly in the Exercises (Quattrone 2006).

The Exercises attempt to shape three dimensions of the subject: humility, “*magis*”, and indifference (Aldama 1989). These three dimensions form the basis for the evaluation of the individual, and have an institutional purpose because they allow the government of the entity by shaping the conduct of each individual. The individual self is to be inserted into a typology framed by humility (which leads to docility of behaviour), indifference (which leads to availability to accept any mission in any part of the world) and the desire for more and better (“*magis*”).

The entity therefore shapes the space of desire (Certeau 1973) determining, through the practices of the Exercises, the daily Examination of Conscience (a practice that is formalised in the Exercises), that is both thinkable and desirable. The social historian Certeau (1973), himself a member of the Society, draws attention to two mechanisms that shape the space of desire by the entity: the use of representations to shape the will, and the charting of the evolution of the Self, relative to a previous position and enlightened by a future desired state.

These representations and the charting of individual evolution are carried out according to three types of classification: three classes of sins; three types of humility and three types of Man. These multiple classes give rise to multiple possible expressions of the Self (Certeau 1973). It is through desire that the Self aims at the highest class of Man, the highest degree of humility, and diminishes the influence on him of any type of sin. Only then can he become a Professed member of the Society.

The practice of charting the interior evolution of the Self as described above in fact opens multiple possibilities from which to choose. The Exercises and the practices of the Self envisaged by the Constitutions do not aim at a determined set of choices based on transcendental forms of truth. What the Exercises do is to organise the discourse by charting the evolution of the Self so that the individual can choose. What organises the inner space of desire is inner truth, revealed by the practice of the daily examination of conscience and the subsequent accountability of affections towards specific inner movements of the faculty of will.

The organisation of discourse around an inner truth and framed by a space of desire is not transcendental in nature, but “metatextual”, *id est*, beyond the text (Certeau 1973). What the Self desires is not specified in the text of the Exercises, and is not transcendental in nature. The specification of desire in the Rule and the relationship with a transcendental form of life are what characterised previous Religious Orders. The innovation in the Society resides in the fact that the Self is governed as an autonomous entity, and that what is shaped in the Self is the space of desire which will limit the individual’s possibilities for action. In this sense, the government of the Society can be characterised as aiming at the conduct of its members, and can therefore be termed as “protogovernmental”.

As for the entity, what is it accounting for? Moulin (1964) presents a table, apparently of his own authorship, with a total of thirty eight characteristics a Professed must have in order to be elected a Superior. In this table, those who are requested to provide information *ad gubernandum* must classify each characteristic of a Professed on a five point scale. Although this is a trustworthy source, it was not possible to find such tables in the Society’s archives and determine the precise date of their implementation. However, it is possible to declare with some certainty that these tables were implemented in the Society after the Restoration, in the eighteenth century⁸¹, and are no longer in use. It is possible that these forms of classification of the Professed, and of accounting their qualities in relation to the characteristics determined in the Constitutions, were put into practice after psychology emerged as knowledge compatible with “existential knowledge”. The emergence of psychology

⁸¹ I thank historians John O’Malley and Markus Friedrich for this insight given during a conversation.

The Organising Principles of the Society of Jesus in the Society is analysed in Becker's study (1992; 1997). Cohen (1974) analyses the responses given to a questionnaire conducted in 1561-1562 among the Jesuits. This questionnaire, comprising thirty points, accounted for birthplace, family, career, date and place of admission to the Society, experience, talents, studies and feelings (Cohen 1974). Of particular interest is the fourteenth point of this questionnaire, which asks about the reasons for entering the Society and that Cohen(1974) statistically analyses. However, the Society did not statistically analyse the results of this questionnaire; what it did was:

“Father Nadal used his formula interrogationis not only as a convenient source of information about the houses he was about to inspect and reform, but also as a preparation for an interview with each inhabitant, to be followed by a general confession”. (Cohen 1974, p. 240)

The use of questionnaires was not a common practice in the Society by the sixteenth century. However, the Society did retrieve information on numbers based on the correspondence. The so called annual letters, described previously, contained information regarding the number of houses in a Province, and the number of Jesuits according to the classification used for the grades of incorporation. Therefore, the Society at the individual level charted evolution according to merits and faults (Quattrone 2006), and, at the entity level, charted the evolution according to geography and the classification of the individual. The charting of the evolution of the Society can be visualised in the next figure.



Figure 1 - "The Origins of the Jesuit House" (c.1620, woodcut), Unknown Author. Printed with permission of the Herzog August Bibliothek

This picture of a tree is a form of visualising the growth of the Society, extensively used by the Society (Smith 2002). The root of the tree is represented by Ignatius and the Exercises, from which the “tree of the Society” grew. Each branch of the tree represents the Provinces, and each leaf a city where there are houses in a province. In its branch the number of Jesuits living in the Province is presented according to their grade of incorporation.

9.5 Conclusion

The present chapter, following the previous parts of the thesis, has addressed the dimensions of the Society’s organisational structure according to two possible lines of reasoning. On the one hand, the development of the Society’s governance mechanisms was underpinned by administrative principles that can be classified as being modern. As has been acknowledged by extant literature on the history of the Society, Ignatius envisaged an organisation structured around the need to manage geographically dispersed operations. However, this does not mean that the Society can be approached solely from a modern managerial perspective, not only because this would be highly anachronistic, but mainly because, as has been demonstrated in this thesis, the Society was imbedded, upon its foundation in 1540, in the Pastorate tradition.

The practices deployed by Pastoral power evolved, and the Society represents yet another shift, most probably the most relevant one, in the development of Pastoral power practices. As has been demonstrated throughout this thesis, the practices

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The Organising Principles of the Society of Jesus employed by the Society, whilst imbedded in the Pastoral tradition, did introduce significant innovations leading to the emergence of a strong counter discourse, either at the Catholic Church's highest hierarchical level, or inside the Society.

The final part of the present chapter, following the methodological approach adopted and the assumed philosophical grounding, has attempted to demonstrate how the Society can be clearly distinguished from previous forms of organising Pastoral power without adopting fully modern forms of organising. However, given the peculiarity of the Society's so-called administrative principles and its global scope, some modern governmental dimensions do seem to be present in the Society and, in this sense, it is the author's contention that the Society can be classified via a "protogovernmental" form of power.

This "protogovernmental" form of power, although also concerned as a governmental form with the "conduct of the conduct" of its members, was deployed according to different dimensions as compared to a "purely" governmental form of power as defined by Foucault and analysed by the "London governmentals" (McKinlay and Pezet 2010).

The Society problematised the management of indifference and the management of desire, which led to the development of the Account of Conscience and to a reliance on a specific form of accounting for personal deeds and failures, so as to be able to classify individuals. The rationality underpinning the development of the governance practices, deeply rooted in Pastoral power, and the "subjectivication" of the Society's

The Organising Principles of the Society of Jesus members according to a typified geographically dispersed “population” of Professed members put the Society at the cornerstone of “governmentality”, and contributes to our understanding of Foucault’s claim that governmental forms of power emerged from Pastoral techniques for the conduction of individuals.

The research project underlying this thesis had, as one of its main objectives, the intention to understand what is it that allowed the Society to internationalise its operations with such an apparent ease, survive whilst exposed to so many different contexts, and grow without changing its structure. The search for what is it that makes the Society special led the author to pursue many different theoretical lines of enquiry. Previous to this doctoral research, the author did attempt to understand the Society through a more functionalist approach. However, that only served the objective of showing how anachronistic and detached from reality one can quite often be. The Society represents, by itself, a different way of organising that was capable of surviving into modernity without being influenced by modern managerial and business categories. This alone is particularly interesting and relevant.

The search for how certain practices and forms of knowledge have been capable of transposing the limits imposed by their disciplinary apparatuses, influencing and changing different social arrangements, has been the overarching theoretical objective of many scholars from many different traditions. Foucault has been, in terms of organisational studies, the main source of inspiration for such theoretical endeavours. However, it is highly debatable whether the latter has had such an influence on organisational studies literature - the “later Foucault” has not had the

same influence as his “Discipline and Punish” period has had. Exceptions to this have been the contributions of Hoskin and Macve (1988), McKinlay (inter alia, McKinlay and Pezet 2010) and the “London Governmentalists” (inter alia, Miller and Rose 1990), which represent still different approaches to Foucault’s later period, namely to his understanding of what Governmentality is and how it can impact on organisational studies (McKinlay 2010; McKinlay and Pezet 2010). This thesis addresses this debate, and it is legitimate to say that its main contribution is the introduction of the concept of “protogovernmentality” to characterise the organising principles of premodern entities, given that the Society is possibly just one among other “protogovernmental” entities.

This thesis has demonstrated how the Society benefited from previous Pastoral forms of power, and how many of the practices in use for centuries by Catholic Church Religious Orders were also adopted by the Society. However, the Society’s global character, namely its absence of territory and its need to control geographically dispersed individuals, did lead the Society to deploy radically new practices. Among these new practices, one, the Account of Conscience, can be classified as Pastoral in its essence; the remaining new practices devised by Ignatius and Polanco can be classified as “governmental” as they are aimed at the conduct of the conduct of geographically dispersed individuals. Although the Society does not deploy what the author would term purely “Governmental” practices, it does rely heavily on “calculation”, “action at a distance” and “inscription devices”. The Society is, therefore, “protogovernmental” in its character, showing how the transposition of

Pastoral practices to Governmental forms of power might have occurred through entities rather than the State.

However, the understanding of the Society as a “protogovernmental” entity does not contribute only to Foucauldian and Governmentality studies. The organising principles of the Society can contribute greatly to our understanding of multinational organisations. The need to control at a distance and to balance the centre and dispersed local operations is still currently one of the major challenges any multinational organisation faces. The governance mechanisms envisaged by Ignatius and Polanco are, aside from differences due to technological developments, quite relevant to contemporary multinational organisations. The centralised decision making, balanced by a strong local adaptation, which have characterised the “way of proceeding” of the Society since 1540, are difficult to imitate by many contemporary organisations. Although commonly accepted as something multinationals should do, local adaptation requires competences and local knowledge that are not always self-evident which, therefore, represent a challenge. This thesis did not aim to comprehend how the Society is capable of adapting locally with such an apparent ease. However, this remains a possible line of future enquiry: to try to understand how the Curia, in Rome, makes decisions centrally and what type of local information reaches it so as to better decide. It also remains unclear how the members of the Society learn to decide together, as a community, an aspect that also presents itself as a major challenge for modern day multinationals.

At the structural level, apart some particularities of the Society related to its religious character, such as the vow of poverty, the capability the Society has to replicate the same structure over and over again does appear to be noteworthy. Relying on apparently simple organising principles, the Society, through a network of correspondence and information gathering mechanisms, is capable not only of accessing information about local contexts, but also about each individual member of the organisation. This alone has allowed the Society to place great emphasis on the election of its “managers”. This particularity of the Society speaks highly to all of us when confronted with so many problems facing organisations at the board level. The experience, academic training, and psychological characteristics required for someone to reach the rank of General in the Society are a lesson for so many organisations that insist on putting little apparent effort into the selection of their Chief Operating Officers and supporting staff.

Conclusion

Throughout this research project, probably one of the main contributions that have emerged from it for extant literature on organisational studies is the relevance of the Society for “governmentality” studies. The Society has been analysed in relation to the notions of Pastoral power and “governmentality”. The relevance of the study of Pastoral power had already been assessed by extant literature, mainly the “London governmentals” (McKinlay and Pezet 2010), but it has been relatively absent from the field of organisational studies. Moreover, governmentality and the analytics of government it entails have also been relatively absent from organisational studies literature.

In this thesis, therefore, the main objective pursued has been the analysis of Pastoral power, following Foucault’s later work quite closely. Having established that, the discussion of “governmentality” as a type of power that, according to Foucault, emerged from Pastoral power was undertaken. The discussion of Pastoral power and of “governmentality” led to the conclusion that, in order to better understand the relation between these two types of power, an investigation into a Religious Order could be enlightening. Given the wide recognition that Foucault’s work is mainly centred on the Western Christian tradition, the option to study a religious organisation drawn from this historical and social perspective seemed plausible.

Following this line of reasoning, the option to study a Catholic Religious Order was made, following Foucault's own suggestion. Amongst the various Religious Orders that populate the Catholic Church, the Society was presented as being the most interesting to investigate if an analytics of government was to be adopted as a research methodology.

The final part of this thesis has been centred on an analysis of the governance mechanisms of the Society of Jesus. This analysis could have been undertaken in several different ways, even following many different research methodologies. However, and following the option justified previously in the research methodology chapter, an analytics of government was undertaken, which led to the engagement with the foundational texts of the Society of Jesus following a determined path. This path, which entailed a particular line of reasoning, is acknowledged by the most important historians of the foundational texts of the Society as being the one that is aligned with either the original intentions of Saint Ignatius of Loyola, or with the historical development of the texts and their inner structure (Aldama 1989; Coupeau 2010). In this sense, the third part of this thesis has analysed the *Formula of the Institute*, the Constitutions and the Exercises. Although the Exercises were the first texts to be written by Ignatius, they were analysed last because they are not aimed at the government of the entity, but at the conduction of individual behaviour.

The analysis of the *Formula of the Institute* and of the Constitutions led to an analysis of the governance mechanisms deployed by the Society, and to an account of the main changes they have undergone since 1540. Following this analysis of the

governance mechanisms and the Exercises, the critical discussion chapter demonstrated how a governmental form of power was deployed by the Society of Jesus, placing it at the cornerstone of the emergence of “governmentality” in the 16th century.

The critical discussion of the governance mechanisms of the Society began by addressing the three administrative principles of Ignatius, and the counter-discourse that followed it within the Society. The three administrative principles identified in the governance mechanisms of the Society are: highly centralised decision making, the extensive use of correspondence for information gathering and trust. After illustrating how these three administrative principles are intertwined, the critical discussion ended with an analysis of how, with the Society, a shift in Pastoral power occurred. This shift culminated in a governmental form of power through changes, introduced by Ignatius, at three different levels: the notion of Pastor, the conduction of the individual’s everyday life and the use of a Constitution for the government of a religious “*body*”.

The shift from a Pastoral form of power towards a governmental one was induced by a new problematisation. Given the mission of the Society, conveyed in the *Formula of the Institute* and in the Constitutions, the problematisation behind the set of practices envisaged by Ignatius and Father Polanco are centred on the following question: how to govern geographically dispersed members without losing uniformity of behaviour and doctrine? As a conclusion to this thesis, and as an attempt to answer the research questions that guided this project, the way the above

referred dimensions were altered was presented, setting the Society alongside previous Religious Orders that deployed Pastoral forms of power, and classifying it as a “protogovernmental” form of power.

10.1 Limitations

The Society is a long lasting and highly-documented organisation. Therefore, any attempt to conduct a study into such an organisation is always limited. Although several limitations of this thesis could be put forward, such as, for instance, methodological limitations, the following paragraphs will attempt to address other types of limitations: those that have arisen from what has been asserted thus far, to which it has not been possible to attend.

The research conducted thus far contributes to the understanding of how Pastoral power was institutionalised in social settings, rather than the State. However, the role of asceticism and the subject in the institutionalisation process has not been fully addressed. Religious organisations seem to foster degrees of commitment from their members that are unusual in mainstream organisations (Miller 2002), although the latter might also achieve this (Pratt 2000). In this sense, it would be rather enlightening to understand how far the individual confuses himself with the organisation in the context of the Society of Jesus. Such a line of reasoning could also shed more light on how the organisation institutionalises individual conduct, and how the individual level becomes related to the collective level. This could extend

existing knowledge on socialisation processes and their possible role as control mechanisms.

Another major contribution that could emerge from such a line of enquiry would be the understanding of how the Jesuits learn to work together. Either the socialisation process or the training processes of the Society, and those of any other type of organisation, tends to focus on how the individual learns to do something or behave independently. However, in the case of organisational studies, it would be relevant to understand how the individual learns whilst immersed in a group, and how the group learns to behave and, more specifically, decide together. The Society, having a collective decision making process, could be enlightening.

Although the current research has proved to be enlightening as regards understanding how a governmental form of power can underpin social settings that are different from the State, several dimensions raised by O'Malley (2010) have not been addressed thus far. O'Malley (2010) draws attention to three changes in the analytics of liberal government:

1. The prioritisation of anticipatory governance.
2. The valorisation of individuals as managers of their own risks.
3. The shift in the role of expertise from that of assuming technocratic responsibility to that of empowerment and support.

In this sense, and still according to O'Malley (2010, p. 502) "*organizations are imaginatively transformed from entities with stand-alone capacities into relational elements whose potential lies in their place in a complex, adaptive and emergent open system*". These types of organisations require new forms of agency which are more autonomous and do lead to flatter organisational structures, such as occur in the Society. However, this does not account for the apparent conduction of a "double-structure" in the case of the Society. The Society seems to have one structure for the conduction of its members, and a different way of conducting the several units under the responsibility of its members. A good example of this is the conduction of a different structure for the Colleges and Universities, as well as for the Jesuit Refugee Service. Since both these activities have a multinational presence with a vast number of employees, research into it could shed light on extant literature on organisational studies.

Again in relation to organisational structure, the present research does not account for the apparent replication of the structure in every Province of the Society. The Assistants, the *admonitors*, and the Collaterals, are replications of the offices at various levels (General, Provincial and Local). This assures replication of structure, as well as surveillance, which guarantees behaviour. The monasteries also sought uniformity of behaviour, but this was achieved mainly through the Rule, and not through the structure. The relation between the use of replicated structures and the flat overall structure has not been accounted for in this research.

Yet another limitation of this thesis stems from the fact that, in religious organisations, the interplay between tangible and intangible authority is intriguing. The examination of how technologies of the Self contribute to Self-understanding in the absence of a tangible personal authority is of utmost importance, insofar as in a governmental form of power the usual forms of tangible authority, such as personal authority, are not made manifest, because the logic that underpins the organisation is internalised by its members. Could this entail a different form of discipline, disguised as autonomy? In this sense, could it be that technologies of the Self are nothing more than organised practices through which individuals are governed? However, the same question remains: how do the Jesuits understand their autonomy? It would be rather pertinent to understand this so that the interplay between discourse, authority and autonomy surfaces. If “governmentality” is understood as something that works through technologies of the Self, being underpinned by one’s responsibility towards himself and towards the Other, is there not anyway a clear authority that governs?

Finally, this dissertation, by having adopted a particular methodology and philosophical underpinning, has failed to engage with different perspectives that would have been, almost certainly, enlightening. As stated previously when describing the methodological choices, this thesis has followed Foucault’s contribution to our understanding of how power has been exerted so as to “conduct the conduct” of individuals as members of a population. The reasons behind the choice of Foucault rely heavily on the fact that his conceptual framework does refer to Western Religious Orders. Therefore, not only did Foucault’s philosophical framework seem to be plausible, but the particular case study addressed, the Society,

did present itself as having the potential to enlighten Foucault's own assertions. The contribution this thesis makes to our understanding of "governmentality" shows that Foucault's philosophical framework was the most appropriate to understand the Society's earlier structural options. This does not mean that other theoretical frameworks did not also have the potential to contribute to our understanding of why the Society organised itself as it did. Following this line of reasoning, authors such as Weber, Bauman and Certeau, among others, or different historical methodological approaches such as social history, could have contributed to the overall objective of this thesis. By opting not to pursue any of these different lines of enquiry, a researcher always assumes a full set of implicit limitations.

10.2 Final Remarks

Pastoral power, as defined by Foucault, relied on the problematisation of how to save one's soul. This problematisation led to the deployment of two main practices: Confession and the Direction of Conscience. The emergence of a new type of problematisation, given the heretic behaviours of the twelfth century and the Protestant Reformation of the 16th century, directed the Catholic Church towards the need to save others' souls. It was no longer a problem of dealing with internal heresies or of assuring how a monk should behave to save his soul, but of converting entire populations to Catholicism. The new problematisation, centred on the need to save one's soul but also the other's soul, led to the deployment of new practices capable of dealing with populations of infidels, providing a supranational character to the Religious Orders. The supranational character of the Religious Orders first

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The Organising Principles of the Society of Jesus appears with the Dominicans, founded with the explicit objective of dealing with internal heresies in the Catholic Church after the famous episode of the Albigenses. However, the Society goes further, and aims mainly at converting those entire populations that had abandoned Catholicism or were "pure" infidels, such as the indigenous populations of the new world. In this sense, whilst the Dominicans had a European supranational character, the Society had a "global" character. The fact that the Society of Jesus was the first Religious Order to choose Rome as its central headquarters is aligned with this objective, and is not a mere detail. The Society was not founded by people who lived in a monastery and wanted to reform it. Nor was it founded by a group of people from a specific country. The Society was founded by ten friends, of various nationalities, who met in Paris and travelled to Rome to set up a Religious Order. Given their stated objectives for the newly founded Religious Order, these ten founders rapidly spread to various countries: to Germany, where they fought Protestantism; to Portugal and Spain, which they used as their base to travel to the Americas, Africa and the Far East and to Italy, where they started founding Colleges.

The apparent "metanational" (Doz, Santos et al. 2001) character of the Society led to a different problematisation: how to organise a body of globally-dispersed members without compromising the mission (saving others' souls) and the uniformity of behaviour and doctrine. The new problematisation is at the cornerstone of the deployment of a new set of practices of government, leveraged on the knowledge of the individual subject.

The set of governance practices deployed by the Society of Jesus had two dimensions: the body (as “*corpus*”, worth differentiating from the “organisation” historically and conceptually), understood as the entity and its means of coordination, and the individual's conduct. The individual's conduct is shaped, by the Society, in the light of the understanding that each individual will be inscribed in a social body with no territory. The absence of a territory to be governed together with its members, such as the spatial territory of the Monastery and its Monks, induces a shift in the type of power deployed upon the foundation of the Society. The Pastorate gives way to a different form of power, governmental power, deployed to face the problem posed by geographical dispersion and the subsequent need to conduct each individual's conduct from a distance.

The Society deployed several practices for the government of either its individual members, or the government of the entity. Many of these practices, if not all, represent a shift in the way religious life in a Religious Order was understood. However, this does not mean that previous forms of religious life, institutionalised in different Religious Orders, changed their own practices after the emergence of the Society. Most of the Religious Orders that had existed before the foundation of the Society, and have survived to the present day, have not changed their main practices. However, many religious organisations that were founded after the 16th century tried, without success, to replicate the main governance mechanisms of the Society. The reasons for the failure of such attempts have not been fully researched. Religious organisations founded after the 16th century, particularly in the 19th century, attempted to replicate two practices in particular: the Account of Conscience and the

Exercises. The Account of Conscience is probably the most distinctive practice of the Society, and, curiously, the least referred to. As strange as it may seem, the attempt to replicate this practice in other Religious Orders failed. It is, therefore, even nowadays, a distinctive practice of the Society and fundamental to an understanding of the way it is governed.

The other practice that was extensively replicated by other Religious Orders is the Exercises. The Exercises, due to their intrinsic difficulty and the philosophical challenges they pose, are easily misunderstood. The replication of the annual practice of a spiritual retreat based on the Exercises by other Religious Orders, and the emergence of such a practice even in many lay members of the Catholic Church after the mid-20th century, might be misleading, insofar as the relevance of the Exercises for the Society lies in the way they shape everyday individual conduct. Everyday life in a monastery was ordered through the deployment of several practices, many of which were communal and easily replicated in every monastery. Such practices are at the cornerstone of the emergence of a Pastoral form of power in the Catholic Church. Pastoral power, as deployed by the Catholic Church either in the context of the several Religious Orders that emerged throughout the mediaeval period, or in the context of the relationship between any lay individual and his Pastor, was underpinned by a set of practices designed to direct the conduct of each individual. However, what seems to be unnoticed in extant literature on Pastoral power in Organisational Studies is the way that Pastoral power itself evolved into modernity.

Pastoral power was deployed as a mechanism to govern individual everyday life, with the purpose of assuring the salvation of each individual's soul. However, Pastoral power was institutionalised in two main forms by the Catholic Church: through the relationship between lay members of the Catholic Church and their Pastors, and through the emergence of monastic forms of life. Both these forms of institutionalisation were aimed at the government of everyday life; both relied, as indicated by Foucault (2009), on the practice of Confession and on the Direction of Conscience. However, monastic Religious Orders as "*bodies*", organised around an ideal way of life (based on the vows of chastity, poverty and obedience), did extend the government of everyday life to other practices, made visible in the choir, communal praying, the layout of the monastery, the dressing, the eating hours and the working hours. These practices were assembled in what is known, to this day, as a Rule (for example, the Rule of Saint Benedict, probably the most important of all the Religious Orders' Rules due to its adoption by many monasteries all over Europe). The Rule aimed at the ordering of everyday life (*Monasticos Ordo* means "ordered way of life") inside the monastery. It is generally unnoticed, however, that although monastic Religious Orders spread all over Europe, their Rule was intended for the government of everyday life in each local monastery. This is one of the most distinctive characteristics of the Society: the practices aimed at the government of either the individual or the entity rely heavily on the assumption that the Society has no territory: "*The Society did not mean the vow for a particular place, but rather for being dispersed to various regions and places throughout the world (...).*" (§603)

The Society represents, in this sense, a “constitutional shift” (**Knowles 1966**) insofar as it does not have a Rule for the government of everyday life in a local monastery, but a Constitution for the government of a “transnational” (**Knowles 1966**) body with no territory. The absence of a physical location for the application of a Rule, which leads to a “constitutional shift”, implies another shift: one in the way the everyday life of each member of the entity is governed.

Everyday life in the Society is not governed by a Rule, but shaped by the Spiritual Exercises which lead to a “way of proceeding”. The Constitutions of the Society frequently speak of a determined practice as characteristic of its “way of proceeding”, calling the reader’s attention to the distinctiveness of many of its practices. However, nothing is said on a subject’s “way of proceeding” except that he must be indifferent: *“To attain this it is necessary to make ourselves indifferent to all created things, in regard to everything which is left to our free will and is not forbidden. Consequently, on our own part we ought not to seek health rather than sickness, wealth rather than poverty, honor rather than dishonor, a long life rather than a short one, and so on in all other matters. Rather, we ought to desire and choose only that which is more conducive to the end for which we are created.”* (SE §23)

The Society, through the practice of the Exercises, does seem to represent a shift in the way Pastoral power is deployed. The government of the individual no longer relies on the deployment of a set of rules that shape individual behaviour, but on the management of a “space of desire” (**Certeau 1973**). The government of everyday life

The Organising Principles of the Society of Jesus calls, therefore, for a delineation of the underpinning criteria of a situational ethics (such as “indifference”), yet distinguishing it from any form of relativism. The management of an individual “space of desire”, and its situational ethical stance, are at the cornerstone of a governmental form of power as deployed by the Society, distinct from previous Pastoral forms of power. Foucault’s (2009) observations about desire being necessary and integral to the new populations and their self-development and management, and the relevance of the “space of desire” to an understanding of the Society’s main practices, leads us to raise the possibility that the Jesuit “*corpus*” was a form of population in Foucault’s sense more than 200 years before any that he envisaged.

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