

Athens Journal of History

Quarterly Academic Periodical, Volume 9, Issue 4, October 2023

URL: <https://www.athensjournals.gr/ajhis>

Email: journals@atiner.gr

e-ISSN: 2407-9677 DOI: 10.30958/ajhis



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Athens Journal of History

Published by the Athens Institute for Education and Research (ATINER)

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- Dr. Steven Oberhelman, Vice President of International Programs, ATINER & Professor of Classics, Holder of the George Sumey Jr Endowed Professorship of Liberal Arts, and Associate Dean, Texas A&M University, USA.

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Gregory T. Papanikos
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It Seemed Like Such a Good Idea at the Time ... - Expected and Unexpected Consequences when Athens & Other Major Greek City States Leveraged Philip V to Draw Rome into the Eastern Mediterranean

*By David P. Wick**

The grand theme of the "liberation of Greece" is peculiar in the second and first centuries B.C. by being proclaimed more often by outsiders than by Greeks, and far more often by outsiders than by Athenians. The Athens that ultimately became wholly Roman after the disastrous hostage crisis provoked by Mithridatic forces on the Acropolis in the 80's started down that road by joining with a few other Greek city states to call in Roman aid against Philip V of Macedon in the 190's, and did so, arguably, believing it could leverage a projection of force by a war-weary Roman Republic to make itself again political master of the Greek mainland. To attract Roman aid against the raids of Philip V's Macedon, Athens and its allies had to make both a case that Macedon posed a genuine threat to the eastern Mediterranean (and to Rome, in the aftermath of its war against Hannibal, and Philip's apparent offer to support that war), and the case that it was a key strategic asset for Rome not only in defeating Philip, but also for stabilizing Greece. To play this hand effectively, Athens not only mobilized its legendary propaganda skills, but also worked public feeling hard in its own streets to make Rome feel welcome, and to make Roman intervention feel natural and attractive at home. By playing this hand, Athens also provoked reprisals from Philip, the damage to Athens' physical heritage foreshadowing more extreme destruction a century later when the city would be caught between the insurgents of Mithridates and the renegade Roman forces of Sulla. The Athenian public became, as a result, even more ready to 'be Roman.' At the time, the intent of Athenian politicians to create a specially protected micro-empire for the city on the Greek mainland appeared achievable, but the Roman response, as so often, moved in unexpected directions, and pulled Athens inexorably into the future empire of Rome. Athens' secondary intention: to become the default educator of the whole ruling culture in Rome's next generations (it believed it was reaching this goal with the Hellenistic east) would require secondary tactics – including a demonstration using a staged lawsuit in Rome. This study intends to examine the earliest stages of the piecemeal, and only partially intentional, first step of Romanizing in Athens – I addressed a later stage in my study of the Mithridatic hostage crisis on the Acropolis.

The grand theme of the "liberation of Greece" is peculiar in the last century and a half of the Roman Republic (the period when the eastern Mediterranean slipped into Roman control) by being proclaimed more often by outsiders than by Greeks, and far more often by outsiders than by Athenians. The Macedonians, the Asians of Antiochus the Great, the Macedonians again, the Romans (punctuated

*Director, Arts, Humanities and Education Division, ATINER & Professor (Retired), Gordon College, USA.

between the Greek outbursts, perhaps even causing them by the repeated withdrawal of their conquering armies), and finally the Pontic propagandists of Mithridates – all pressed the phrases about liberation upon the old lands round Attica. Judged by any reasonable standard, Athens did not raise a major voice in this chorus, much less lead it. The expected watchdog of Greek liberty, to use the phrase about the silent guard dog in the Sherlock Holmes anecdote, became a "curious incident" because it did not bark. There were many Greeks of that day – among them more radical members of the Achaean League, or the Hellenic separatists dazzled by the future free of intrusive Hellenistic kingdoms (or of Rome) prophesied by independence movements in Anatolia (most famously by Mithridates), or by refugees from Delos (the Athenian prize for bringing Rome eastward) – who did not quickly forgive her.

Nor, in the centuries since, have Hellenist historians entirely done so. W. S. Ferguson – the classic collector and defender on post-Alexander Athens – shows an unusual feel of labor and strain (even with all the customary eloquence in his toolkit) to find a thread of nationalist Greek resistance to Rome in the Athens of the Philip-Antiochus or Mithridatic siege era, and – tellingly – he was in the end driven to rely on the desperate argument that so proper a sentiment "must be there".¹ In 'Students in the (Ancient) Streets' I noted how Badian and others, when the narrative reaches Medeios and Mithridates in the 90s and 80s, had in the late 20th century cut away much of the scaffolding that propped his defense.² Jean-Luis Ferrary worked hard to make the confused intervention of Athenion and Aristion (sent from, and supported by, Pontus though both claimed to have studied in the city) sparking that crisis part of a civic philosophical renaissance toward liberty – a revolt of the heart or conscience of the quintessential Greek *polis* against the plausibility of Roman influence and its allies in the business class.³ I shall return to Ferrary later: the last years of the 80s would have made a more stirring tale for Hellenists anxious about the honor of Athens, but his revolt of the heart, planted hopefully there, is as difficult to discover in our evidence as Ferguson's popular uprising. Some recent writers on the Piraeus – Christos

1. I dealt with this episode in detail in the study "Students in the (Ancient) Streets, or Agent(s) Provocateur? The Liberal Arts Schools of Athens and the Hostage Crisis of 88" *Athens Journal of History* Vol. 6, Issue 4 (Oct 2020). For Ferguson, W.S., see *Hellenistic Athens: an Historical Essay*. (London, 1911, reprint Cornell 2008), 284, 418, 427 ff. Badian, E "Rome, Athens, and Mithridates" in *American Journal of Ancient History*, vol. 1 (1976), pp. 505 ff. Tracy, S. V. *Inscriptiones Graecae* II² 2336: *Contributors of First Fruits for the Pythais*, (Meisenheim am Glan: A. Hain, 1982) pp. 174-180.

2. Badian, "Rome, Athens, and Mithridates" pp. 501-505. Cf. Ferguson, *Hellenistic Athens*, pp. 268-277, 428-429; Mossé, C. *Athens in Decline: 404-86 B.C.* (London, 1973, Routledge edtn. 2013), pp. 138, 142-143.

3. Ferrary, Jean-Louie. *Philhellénisme et Impérialisme: Aspects Idéologiques de la Conquête Romaine du Monde Hellénistique, de la Seconde Guerre de Macédoine à la Guerre Contre Mithridate*. (Rome, 1988, rev. edtn 2014).

Panagos indirectly, Robert Garland almost stridently – have built a shrine to the last spark of willful Greek independence around the Docks and the Munychia (glad at least that the port city held out against Sulla longer than Athens proper).⁴ For the older City above the port Garland has only, in the parting paragraphs of his narrative chapter, a note of contempt.⁵

But all this is really a skirmish over portents of the future for our present study. In that earlier look at the 80s (published in the *Athens Journal of History*), I have argued that the European campaigns of the Mithridatic war that began in 89 of the old era were not about Greek freedom, but about advance bases and a buffer zone for Mithridates himself. The resignation (or defection, or collapse, or suburbanization) of the Athenian spirit in upon itself had begun much earlier, and many of my historical studies in these pages have looked at this transforming phenomenon from different angles. By 200 (of that age) the city faced a crisis of self identity which it began to solve, encouraged by the flattering attentions of Rome and Pergamum, by concentrating on a mellowed reflection of its own past. By 150 it had grown dependent on the rewards that internalized quietism had given it, though the wealthiest reward (Delos) would be gone before long. By 100, not all that far from the now-ruined Corinth, Athens would already be an increasingly cosmopolitan tourist center and refuge; one in which Athenian-ness was a becoming more a flavor of nostalgia than a call to freedom. When in 88, the wars of "Greek freedom" finally washed directly against its walls, the iron tyranny of outsiders was necessary to make it fight (if it ever truly did) against the coming of Rome.

How then did the Athens that should have been the beacon of Greek freedom end up not only *not* protesting the arrival of Roman military involvement on the Greek mainland, but manage to actually talk herself into inviting it? Athens' transformation and survival as a suburb (political and spiritual), willingly quiescent, in the end, under the shadow of Rome, began, as I see it, with the belief that Rome was a politically useful tool, one that sophisticated politicians could safely employ and then put back in the box. The outcome was of course so predictable to twenty-first century critics that for us it almost loses its irony. But Athenians in the few generations before the forming of the Roman Empire were among the most politically educated in the Mediterranean, and in fact the educators of most others. They were not any longer the leaders of Greece, but I

4. Garland, Robert. *The Piraeus from the Fifth to the First Century B.C.* (London, 1987), 55-57, 190-191. See also Panagos, Christos Th. *Le Pirée: étude économique et historique depuis les temps plus anciens jusqu'à la fin de l'empire romain*, (Athens, 1968). Trans. from Greek into French by Pierre Gerardat., 133-143.

5. Garland, p. 56. "It is perhaps not too fanciful to suppose that its terrible destruction was in part inspired by loathing for the democratic sentiments which its population had consistently espoused and probably (sic) continued to uphold..." Garland in fact implies that Athens *propter*, the 'uptown' city, or the "Asty" as he insists upon calling it, was the normal prey for aristocratic sentiment.

would like to suggest the argument that by attracting Rome into the Aegean for a few years in the chaos following Italy's war with Hannibal, that is exactly what the political elite of Athens hoped to become.

Philip V - The Uses of a Plausible Threat

In 201, after the Battle of Zama, the Roman Senate tried to lay the long disaster Italy had endured against Hannibal and Carthage to rest in its own terms. It demanded reparations from Philip V of Macedon, and it used an Athenian request for help against the revenue-scavenging raids Philip frequently made south into Greek territory as its justification.⁶ Athens simply wanted them to stop; Rome sensed an opportunity in Athens that neither of the two "great powers" in contemporary Greece had exploited. During the third century power over the majority of the Greek mainland had passed back and forth in a tug of war between the Antigonid kingdom of Macedon and the Achaean League formed (originally) in southern Greece to oppose it.⁷ It is not too startling an irony that the theme of "Greek liberation" passed naturally to whichever of these contestants at any given moment held second place.⁸

Macedon was weak enough by around 200 that it tended to magnetize other sources of threat – it attracted the attention of Antiochus III in the East, just as it did Rome in the West – to any stronger powers with interests in Mediterranean trade, the constant Macedonian raids into the Aegean meant safety in Greece, and security of trade "needed" someone to eliminate the old thorn in the Greek side by means of an armed protectorate. When Macedon could, it would still throw mobile troops south and occupy Philip II's old garrisons -- the three "fetters of

6. While the Senate, as mentioned, was concerned at the moment to be seen winning or ending the war in some way that rehabilitated the reputation of the Fabian faction, did not involve recognizing a rescue by the irritating outsider Scipio Africanus, it did, at need, use as many of his troops in Greece (without him) over the next few years of the 'Philip' and 'Antiochus campaigns, as it could.

I have argued elsewhere (Διδασκαλία Στρατηγικής Ισότητας: Μια Σύντομη Μελέτη για το πως ο Σκιπίων δίδαξε τους Καινοτόμους Στόχους και τους Αυτοσχεδιασμούς του την Παραμονή της Αφρικανικής Εισβολής, *Athens Academic Journal*, Vol. 2, No 1 March 2022, pp. 49-67) that the secret to the success of this patchwork ploy was the ability Scipio had shown to teach his strategic improvisations to his junior officers and even unit commanders, who then applied them even in his absence. The ResearchGate post of this article includes an English version.

7. Ferrary, "Le Thème de la Liberté des Grecs pendant la Seconde Guerre de Macedoine," and "Le Thème de la Liberté des Grecs et son Évolution de la Guerre D'Antiochos À la Guerre de Mithridate," in *Philhellénisme et Impérialisme*, pp. 45-218.

8. Engels, Donald. *Roman Corinth: An Alternative Model for the Classical City* (Chicago, 1990), pp. 14 ff.

Greece." The Achaean League formed to protect Greece sent embassies to Rome to advertise the danger of Macedon itself, and perhaps also of Antiochus waiting greedily just across the Aegean, and argued that with only a little help an Achaean "legal protectorate" would stabilize trade between the east and west instead, and in it one can almost see an early form of "Greek nation" developing. The Achaean League had, if J.A.O. Larsen is correct, already begun to put together a representative assembly by which a regular federate government (dominated at first by the Achaean commercial cities) could arbitrate Greek disputes and organize (its own) "Greek" foreign policy.⁹ The principle bone over which these dogs fought was not Athens but Corinth.

Set against whatever symbolic value Athens might have had in any campaign for Greek hegemony, any cold-eyed and pragmatic strategist had to weigh the obvious immediate importance of the city on the Isthmus. Corinth had always been one of the "fetters" outsiders had garrisoned to control the Greek mainland – perhaps the most indispensable of them because its position on both land *and* sea trade routes; whatever wished to cross Greece economically had to pass through it.¹⁰ Cicero passed on the common observation that in the years before 146 so many Corinthians had tied their livelihoods to commerce that the city was in danger of letting its agricultural base fall into neglect.¹¹

The westward-facing trading towns along the Corinthian Gulf felt this strategic importance keenly. Their ships and exports could not continue easily into the eastward Hellenistic world if the Isthmus were locked against them. Aratus of Sicyon ejected the Macedonian garrison in 243 with a "League" army, and Corinth gratefully joined the federation, only to fall back into the hands of Macedonian raiders after the Battle of Sellasia in 222. With armed northerners back in place on the Akrocorinth (however little they may have resembled the old phalanx-spearmen Philip II had put there), the Achaean League found its focus for survival thrust once again westward. Macedon pushed the individualist Greek cities back toward Rome.

Denied Corinth as a practical symbolic focal point, the Achaean League cast about for an alternative of sufficient cultural or political *auctoritas* to impress her Roman allies. Athens had offended Philip in 205 by rousting two Acarnanians out of an Eleusinian ceremony and executing them for sacrilege.¹² Acarnania was a Macedonian ally, which meant in practical terms the poorer, smaller settlements of the western Greek hills traded some safe but circuitous access for Macedonian marauding parties in return for the security of their own meager farms. Athens had called the bluff. Worse still, though less directly so, Athens had developed an informal alliance with Ptolemy Euergetes I in the 220's. Athens' traditional

9. Larsen, J.A.O. Greek Federal States: Their Institutions and History. (Oxford, 1968), p. 86.

10. Engels, pp. 12-13, 50-52, 58-61, 113-114.

11. Cicero, *De Republica* ii, 6.

12. Livy XXXI, xiv, 6. Polybius XVI, xxxiv, 5.

immunity from Macedonian interference had accumulated around the understanding that it would remain a neutral city, but none of these actions could be made to look neutral.¹³ It could therefore be presumed to lie in danger as Philip, faced with the consequences of his bad gamble – he had offered publicly, or had been caught offering, to partner with Hannibal during the 2nd Punic War – began to increase his raids southward into Greece and to settle old scores. A flying column of Macedonian plunderers swept through Attica and did as much quick damage as it could. Athens, its accumulated symbolic value, its strategic location, and its well-preserved naval base, seemed ripe for the plucking.

Yet the Achaean League moved too slowly. Philip, perhaps to their surprise, did move against Athens, and faster than calculated, and Athens did ask for help – from Aetolia, from Rhodes, especially from Egypt, but not from the much-closer Achaia. Whether or not some distrust of being swallowed up in the changed political landscape of Greece was at play in the Athenian mind at this moment, to southern Greeks the city's behavior must have seemed very dangerous indeed. Athens' principal appeal was to Egypt, but the harried government of Ptolemy Epiphanes merely made some comforting noises and referred the matter to Rome.¹⁴

It was from Rome and from their smaller Hellenistic ally in Pergamum that Athens suddenly received a strange and unsettling burst of attention. An Attic embassy to Rome waited nervously on the Senate as the Roman *patres* sent a parallel mission from Aetolia packing back home (Aetolia had defected in the dark years of the Hannibalic War). The urban crowd around the Forum – swollen by a host of veterans – seemed heartily sick of military service and expenditure, the Athenian appeal for help too late in the long, recent, list of dangerous military gambles.

Yet the Athenians found the Senate courteous, even anxious to please.¹⁵ Each side had something the other wanted: the Roman Senate desired a pretext to settle scores with Philip V for his "treachery" back in the dark year after Cannae, or at least to show the western Mediterranean public it was doing something more aggressive about the intentionally publicized threat than its hero Fabius had done about Hannibal for two decades. It may also have hoped to hand the fame of a major victory to someone besides the alarming and cocky young Greekling outsider Scipio Africanus – a nuisance the government was now working to shuffle out of the public eye. Instead it could now, if it could play up the legendary symbolic value of Athens, show off a pretext by 'saving' a culture dazzling in its prestige, ancient and steeped in the *auctoritas* of eastern Mediterranean history. Athens of course had its own doubts about the

13. Diodorus Siculus xxviii, 7.

14. Livy XXXI, ix. Pausanias I, xxxvi, 5 ff. (which is based perhaps on an Athenian honorary decree which Pausanias may have seen). Cf. Ferguson, 269.

15. Livy XXXI, ii. Pausanias I, xxxvi, 5 ff.

involvement of "barbarians" in saving the Greek world, but quieted them with pseudo-scholastic chatter about the Trojan legend and Aeneas.¹⁶ Rome worked at speaking the language of rescue to its friends in the Aegean (and not just to Athens – Rome had an outrigger to play, hints of east-Mediterranean intelligence that the Asian super-monarch Antiochus III, worn down by patrols on the Silk Road, would soon also be setting his sights on invasion of the west, that changed the 'center of gravity' in the upcoming mission, one that would in less than two decades make Greece much feel nearer to, a bit more of a suburb of, Rome).

The result of all this mission-talk over the Aegean was an explosion of diplomatic pomp – some Roman, some Asian – in the Athenian streets. Roman legates, bearing a satisfying and stern ultimatum for Philip, met Attalus of Pergamum (who had far more reason to worry about Antiochus than Philip V) himself in the Piraeus. The impression its military docks made upon those Romans with an eye for logistics (especially logistics against a more Asian invasion) weighed substantially upon the practical Roman military mind for generations. Attalus and an embassy from Rhodes, after a solemn procession up between the ruins of the Long Walls and into the City, made their common declaration of war against Macedon in a grand session of the *ekklesia*.¹⁷ The Roman delegation, quiet in the background, had already sounded a bass note that deepened the chorus of adulation and prestige: Athens and Rome were to be not merely *amici* but *symmachoi*, allies whose foreign policy was each their own, who owed military service only when they chose to give it.¹⁸ Athens, battered into silence by repeated failures against the first generation of Macedonians after Alexander, and for some years now almost an afterthought among the shifting federations of free and captive Greece, lay suddenly in the limelight again. Her fleet consisted perhaps of only a few *aphract* ships, each carrying a ram but no fighting decks;¹⁹ her army was a small force of mercenaries and traditionally armed graduates of the *ephebeia*;²⁰ but she owned in some sense more of the

16. Ferguson, 270-271, esp. note 5.

17. Polybius xvi, 25.

18. Ferguson, 270, 272.

19. Livy XLV, x. The small, undecked *aphract* ships used so often by Hellenistic cities as 'harbor patrol' were intended only to chase local lawbreakers or pirates, their limit being perhaps pirate-craft the displacement of fishing boats, and their rams were likely intended more to stabilize the narrow, oar-powered craft in rough sea – the original purpose of ram-like undershot bows in ancient watercraft – than to attempt combat hits (the police crew of archers were the real offense most carried). The *ephebeia* (the ancient equivalent of an urban 'high school'), taught the ancient rudiments of phalanx formation along with 'local heritage civics' and some general education, but its principal military use was really to prep young citizens for manning walls or crowd control. Athens would never again pose a traditional military threat to anyone on its own, which made the story of Deuxippos rallying students and other local military hobbyists to defend the walls against the Heruli in the later Empire an even more satisfying local legend.

20. Livy XXXI, xxiii-xxvi.

shared Greek past than most Greek cities cared to remember. Rome sighted this value with the fresh eyes of an outsider and set it spinning again. It flew Athens like a flag. Perhaps partly from necessity and the stress of the moment, the ambitious citizens of Athens missed something of what was really happening to their status - it was important, but important because it tied Rome to Greece, not because it was in any way what it had imagined it would be a few years earlier: the political manager of Rome in the Aegean.

Athens survived the war wounded, but walking with a fresh stride. Roman assistance duly arrived, and though primarily naval and concentrated upon the excellent facilities in the Piraeus, it showed Rome meant to play the new hand it had dealt in Attica.²¹ Philip, after his raid-commander Nicanor had been bluffed back,²² was forced to lead a flying rampage through the Attic farm country himself. Though he was able to beat the Athenian hoplite force handily enough (likely because he was more mobile), he found the newly reinforced city impregnable. Frustrated, he moved round to its quiet southeastern outskirts and sacked its *gymnasium* (hitherto largely untouched by warfare), damaging the Cynics garden of Cynosarges and the Lyceum in the process.²³ As he retreated, he attacked and mutilated statues and shrines in the Athenian suburbs and the country villages of Attica – if Athens wanted to play at this new game of spiritual *auctoritas* with its symbolic heritage, it could pay by seeing the symbols destroyed. Like its declaration, the prosecution of the war was full of prophecy of things to come.

Athens retaliated by mutilating all its monuments to Philip and his forebears.²⁴ It was angry, but most importantly, it suddenly felt vulnerable and - if not small - at least much smaller than it had imagined on the scale of the events playing out around it. Athens seems very significantly to have sent no troops to the final reckoning at the Battle of Cynoscephalae, whether because of exhaustion, or fear, or a new instinct that it had become a different creature on the Greek mainland than its old dreams of power had pictured. The duty Athens now was apparently to survive *being* Athens, and to be "Athens against Macedon." Livy (or perhaps Polybius before him) rather missed the point carping sourly that it fought with words alone.²⁵ Its business was to fight with words, or perhaps more particularly with those words woven up into its history in Greece. Athens, wittingly or not, had begun to redefine Greekness and "Greek freedom" not as Athenian or Greek in some independent sense, but (out of sheer anxiety and the drift of the war) in the direction of dependence on Rome.

This was not at first quite so clear inside Athens as it was to Greeks afterward.

21. Livy XXXI, xiv, 3; and XXXI, xxii, 4 ff.

22. Polybius xvi, 27. Livy XXXI, xvi, 2 (where the general is called Philocles).

23. Diodorus xxviii, 7.

24. *Inscriptiones Graecae*, vol. II, 417. Cf. Ferguson, p. 277.

25. Livy XXXI, xlv.

Of the allied commanders stationed in the City (Byzantines, Rhodians, Romans, Pergamenes) Attalus of Pergamum maintained the highest profile, culminating in the autumn of 199, when he was initiated into the Eleusinian Mysteries.²⁶ The city proper played host to the military staffs, was the command center for the minor theater of war in southern Greece, and acted as the departure point for a flurry of diplomatic activity.²⁷ The Romans bent their practical attention on the Piraeus, packed now with a variety of fleets staging themselves toward the northern Aegean.²⁸

In the aftermath of Cynoscephalae and Philip's surrender, Athens had a clearer taste of her new position. No former Athenian dependencies or conquests were "returned" to her. The conqueror Flamininus declared, not from the Acropolis or the *Pnyx*, but from a *faux* 'Olympic games' created for him in the Peloponnese, that Greece was to be "free" – meaning each *polis* ought to attend to its own business and remember with due gratitude its patrons and protectors in Rome, and that Rome's armies were heading home assuming the new arrangement would run itself locally. This assumption that an understanding of *clientage* was universal marked the initial and fundamental Athenian error when it started the play aimed at its "Roman settlement of Greece;"²⁹ it leaned on, but misunderstood, the counter-intuitive Roman secondary assumption (or hope?) that Athens would not only understand but delight in its new limited role. It was to provide leadership by example, to become quiet and independent like a good Latin *civitas* should, and the other Greek cities, impressed both by its heritage and newfound honor, would follow suit. Never mind that Athens 'leading by being quiet' was (to any Greek) an oxymoron, or that doing so would have crippled the schools. 'Seemed like such a good idea' was suddenly defined by how things 'seemed' in the western Mediterranean, not in Greece, and no university town could process enough students to shape a thought-ecology so large. To those Athenians who began to grasp this, it must have been very unsettling.

All this was not remarkable to anyone else; it was the Roman way of operating, and Polybius would before long build a career by leveraging himself to

26. Livy XXXI, xlvii.

27. Livy XXXII, xvi.

28. Livy XXXI, xlv; XXXII, xvi; XXXI, xlvii.

29. Badian, *Foreign Clientelae*, 54, 74. Cf. Sherk, Robert K., ed., *Roman Documents from the Greek East: Senatus Consulta and Epistulae to the Age of Augustus* (Baltimore, 1969), no. 33 (p. 211 ff.). Wallace-Hadrill, Andrew, ed. *Patronage in Ancient Society*, (London, 1989), 120, 125. The confusion is perhaps most vividly portrayed in a Rhodian speech in Livy (XXXVII, liv, 17) which speaks of a *patrocinium* of Greek "freedom." Cf. Livy XXXIV, lviii, 11. I have followed this thread elsewhere in papers presented to ATINER and published in both the Athens Journal of History and the Athens Journal of Mediterranean Studies, following both the stories of political teaching in the Athenian schools, and that of the hostage crisis spurred by the Mithridatic War (and see note next page).

Rome and then “explaining it eastward.” What is remarkable, or ought to be, is the surprise it caused in Athens. The city that had intended a rather spurious form of Greek freedom under Athenian control was left to use its political teachers and practicing elite, and the students (young and elderly) it could attract, over the coming generation, to find a way to 'spin' the Roman "freedom" of the client from outside threat and the worry of making big decisions for itself into something less troubling.³⁰ The schools, not the elected officials or the money behind them, became the real center of gravity in the new political Athens. That, the schools had planned on. It was the limit of their role, and the limit of their footprint in the mental ecology of the coming Mediterranean, that they had confidently over-estimated, something similar academic or management cultures have likely over-estimated many times since.

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30. I have followed some of this particular story – most recently on the use of Carneades from the Platonic *akademe* in the Oropus lawsuit of the 150's to shape a Roman impression of Athenian political wizardry and to attract students (actually helped by the expulsion of political teachers from Rome by Cato which it precipitated) in D. P. Wick, "Plato's Academy and the 'Roman Market': A Case Study in 'Humanities Education During Times of Crisis or Recession,'" published in the *Athens Journal of History*, Vol. 9, Issue 3, July 2023 – Pages 249-260. Academics have forgiven Athens, when they have, for failing to agitate the cause of Greek freedom by seeing this ending or change for the city as the triumph of intellect over politics, but it would be wise to remember the intellectual ecology that created Carneades, and the effect of his (and the schools behind him) in winning this partial victory. Selling an ability to massage or herd votes or popular opinion in real time – the object of the new Platonic *akademe* and of the Aristotelian and Epicurean political schools outside Athens – never created a 'Greek-led Senate,' but helped create success in unexpected forms as 'shaped populist' movements unraveled the Roman Republic (and those new cultures joining it, even more than those conquered, in the last expansive century). The trail of the Athenian-Roman schools and their changes I have followed in recent articles were not experiments of intellect or 'rhetoric' cultured in glass dishes. The tools helped to devastate a great deal in 'real time.'

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Miltiades the Elder and the Younger: Two Early Biographies

By Oliver R. Baker*

[Miltiades son of Kypselos, also known as Miltiades the Elder—Hdt. 6.35.1, 6.35.3, 6.34–36, 6.36.2, 6.37, 6.38–39]

[Miltiades son of Kimon, also known as Miltiades the Younger—Hdt. 4.137.1, 6.39–40, 6.41, 6.103, 6.104, 6.109–110, 6.132–134, 6.136, 6.137–140, 6.134.2, 6.136.2–3]

Claims that Herodotus reveals himself as a proto-biographer are not yet widely accepted. To advance this claim, I have selected two men, Miltiades the Elder and his nephew, Miltiades the Younger whose activities are recounted in the Histories. It is the latter, one of only a few Athenians with any battle experience, who taking refuge back in Athens, finds himself in a leadership role during the first Persian invasion of Greece. It is to a near contemporary to whom we attribute the maxim—character is human destiny. It is the truth of this maxim—which implies effective human agency—that makes Herodotus' creation of historical narrative possible. He is often read for his off-topic vignettes, which color-in the character of the individuals depicted without necessarily advancing his narrative. But by leap frogging through two of the nine books of the Histories, we can assemble a largely continuous narrative for these two remarkable individuals. This narrative permits us to attribute both credit and moral responsibility for their actions. Arguably, this implied causation demonstrates that Herodotus' writings include much that amounts to proto-biography.

Proto-Biography

Herodotus has long been recognised as the first Western historian, but his *Histories* are also read for his lively biographic anecdotes and character vignettes. Although Herodotus writes history, many of his anecdotes do not extend his historical narrative at all, and when not an outright digression often color-in something of the character and values of selected notable individuals. He selects short, seemingly off-topic *stories* about the deeds, and conduct or misconduct of his heroines and heroes that eloquently reveal much about their character, but which seemingly without judgement often also provide what might become a *defining moment* for each individual.

It is to Herodotus' near-contemporary, Heraclitus, to whom we attribute the maxim (ἦθος ἀνθρώπων δαίμων) “*êthos anthropôî daimôn*” translations for which include the commonplace *character is destiny*.¹ Neither *êthos* nor *daimôn* are easily

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1. Heraclitus of Ephesus, a near contemporary of Herodotus, and one of the Presocratic philosophers, was active in the late sixth- and early fifth-centuries shortly

translated, and *anthropôî* is often ignored. But the maxim is senseless if any part of it depends on powers outside of the individual. It is the truth of this maxim—which presupposes effective human agency—that makes the creation of historical narrative, rather than divine myth or heroic epic, even possible. Hesiod, Homer, and to a certain extent Plutarch many centuries later, want to argue that it is primarily ancestry or pedigree that will determine destiny. Undeniably in the fifth century the well-born will often have greater autonomy, authority, and agency.

Claims that Herodotus reveals himself as a proto-biographer are not yet widely accepted. In an article lamenting the gap between Herodotus and Xenophon—Helene Homeyer makes the claim that Herodotus is also the father of biography.² To advance this claim, I have selected two exceptional individuals, Miltiades the Elder and Miltiades the Younger, the latter the Athenian hero of the battle of Marathon. Surprisingly neither are found among those twenty-four Greek notables recognised by Plutarch in his *Parallel Lives*. By leap frogging through two of the nine books of Herodotus' *Histories*, even if the entries fall short of a cradle to grave depiction, we can assemble a reasonably continuous narrative for both of these individuals, and thus through their exploits, gauge their character against the epic heroines and heroes described by Homer. Emulating Tomas Hägg, I let Herodotus speak for himself through in-text, quotations.³ For the latter I have used the Andrea L. Purvis translation.⁴

Just as Homer and Hesiod stand at a crossroads where oral myth is set down in writing, Herodotus stands at another crossroads a few hundred years later where selected stories about great heroines, heroes, and scurrilous hounds are taken out of the oral tradition and set down in writing. Albeit writing prose rather than epic poetry, Herodotus regards himself as a contemporary Homer, but also as a storyteller in Heraclitus' footsteps with the ability to assign credit and with it, moral responsibility.⁵

before Herodotus was born. We have no evidence either way about Herodotus' familiarity with Heraclitus' works, but their notions of human causality or agency concur.

2. See "Zu den Anfängen der griechischen Biographie." Helen Homeyer writes, So ist Herodot nicht nur der Vater der Geschichte, sondern zugleich auch der Schöpfer eines Zweiges der biographischen Darstellungsweise geworden, die bis zu Plutarch reicht. This can be roughly translated as "So Herodotus is not only the father of history, but also the creator of a branch of biographical representation which extends up to Plutarch" (Homeyer 75, 81).

3. Hägg comments, "The idea that [someone] knows the texts sufficiently well in advance, or has them at hand to consult continuously is a pious illusion: it is better to bring the texts physically into the discussion" (Hägg ix).

4. See Robert B. Strassler, *The Landmark Herodotus*.

5. Re-discovered in 1994 on the harbour wall of Halicarnassus, the modern Aegean resort of Bodrum in Turkey, the *Salmakis Inscription*, possibly early second century, describes Herodotus as (Ἡρόδοτον τὸν πεζὸν ἐν ἰστορίαισιν Ὀμηρον ἤροσεν,) *Hēródoton*

Thankless Athenians

Whether fully deserving of such a singular honor or not Miltiades the Younger, or more formally Miltiades son of Kimon, comes down to us as the Athenian general, one of the ten *strategoï*, largely responsible for the successful tactics employed by the Athenians during the battle of Marathon in the late summer of 490. But as the Spartans lamented so bitterly—after being instrumental in driving Hippias, the last of the Peisistratid tyrants, out of Athens and into exile at the close of the sixth century—the Athenians are a thankless people (Hdt. 5.92.2).⁶ Within a year of his Marathon triumph Miltiades is disgraced, tried on a capital offence, and unable to immediately pay a colossal fine dies while ignominiously imprisoned for debt. Election to general in early fifth-century Athens, particularly in time of war, does not come about strictly on merit—you need a little help from your friends and along the way a little help from your enemies and rivals, too.⁷ However, there is much more to Miltiades' spectacular military and political career than his disgraceful incarceration and ignominious demise in 489. But for this we have to examine the increasing Athenian dependence on trade during the sixth century with the kingdom of Thrace and with numerous other resource-rich kingdoms along the shores of the Black (Euxine) Sea.⁸ This examination is exactly what Herodotus does in book 6 of the *Histories*. But to make sense of the opportunities exploited by Miltiades son of Kimon, we must look at his family, the Philaids, as ambitious and wealthy aristocrats and weigh their influence on events in the eastern Mediterranean during the latter half of the sixth century and early fifth century.

ton pezon en historiasin Homêron êrosen, “[Halicarnassus] engendered Herodotus, the prose Homer of history” (Isager 7–8 and, Priestley 187).

6. From other sources we learn that Hippias (a Peisistratid) was elected *eponymous archon* or chief magistrate in Athens for the year 526/525; Kleisthenes (an Alcmeonid) in 525/524; and Miltiades (a Philaid) in 524/523. To be eligible these citizens had to be aged at least thirty, but were limited to one term and could not stand for re-election later.

7. We do not know to whom this comment applies, nor who said it, but it likely applies to the *demos* rather than the Athenian aristocracy.

8. Herodotus describes the ancient kingdom of Thrace as most numerous, second only to India. But extending from the European side of the Aegean in the west to the Danube in the east it was disunited and therefore militarily weak (Hdt. 5.3.1). The Thracian Chersonese—better known now as the Gallipoli Peninsula—lies on the European rather than the Anatolian side of the Dardanelles and is usually considered part of the Thracian kingdom.

Athenian Tyrants

Political power and influence throughout sixth-century Athens is unequally shared among a handful of prominent aristocratic families. Over time these families amass land, wealth, prestige, and privileges which they pass on to succeeding generations, in turn reinforced by marriage alliances within the community and outside. One notable family, the Peisistratids, claim descent from Neleus, the father of Nestor who fought in the Trojan War. Another, the Philaids, claim descent from Philaios a son of Ajax, another legendary hero of the Trojan War. Other families, the Alkemeonids, for example, who represent an old Attic family, do not pretend to go back that far, but are nevertheless wealthy and influential.

Tyrant and tyranny are terms that are now considered pejorative, but they have a very different connotation in the eastern Mediterranean during the sixth-century.⁹ It is important to recognize that tyranny is usually only a transitional form of government. The citizens facing internal chaos or a threat from an external power select or concur with the temporary appointment of a strong ruler. If this non-hereditary ruler is successful, the crisis which led to this appointment fades and with it the justification for this form of authoritarian rule.¹⁰ But, given human nature, power leads to a sense of entitlement and the expectation that their privileged rule should be extended for life if not become hereditary. In the latter half of the sixth century Athens is governed by the Peisistratid tyranny—first the father, Peisistratos, and then his two sons Hippias and Hipparchus, possibly twins.¹¹ At this time other communities, Greek- and non-Greek-speaking, are also governed by tyrants or some form of hereditary monarchy, so in this respect Athens is not exceptional.

Miltiades Son of Kypselos

It is into this dynastic struggle among prominent Athenian families—a struggle which will continue long after the reforms instituted in the last decade of the sixth century by Kleisthenes—that Herodotus first mentions that in about the year 555 Miltiades son of Kypselos, the step-uncle of the future Miltiades son of

9. Modern readers must accept the anachronism. For Plato the terms king (*basileus*) and tyrant (*tyrannos*) are not equivalent and indeed are at opposite poles—the philosopher-king the best and happiest of all men, the tyrant the worst and most miserable.

10. For further discussions about the rise and fall of sixth- and fifth-century Greek tyrants see Prentice, 84–87.

11. Peisistratids is the common term for the three tyrants who ruled in Athens from 561 to 510, namely Peisistratos who was born in the last decade of the seventh century and his two sons.

Kimón—the hero of Marathon—who will be born a year or so later. A Philaid, at a time when the Peisistratids have a tight hold on power, Miltiades son of Kypselos [c. 590–c. 520] is likely to be discontented with his lot seeing absolutely no opportunities for adventure, let alone political advancement in Athens. However, his career prospects change in an entirely unexpected and unsought direction.¹² Herodotus writes:

The Thracian Dolonci were then in possession of the Chersonese, and because the Apsinthians were pressuring them with war, they sent their kings to Delphi to consult the oracle about the war. [2] The Pythia told them that after they left the sanctuary, the first man that they met on their journey home who offered them hospitality should be invited by them to come to their land as leader of their settlement. So the Dolonci left and traveled down the Sacred Way through Phocis and Boeotia, but since they received no invitation from anyone, they turned off the road toward Athens (Hdt. 6.34.1–2).¹³

From Herodotus' account, the Pythia's sole criterion for selecting a leader is surprisingly progressive—someone who will serve as what we might call *the first among equals*: someone who will provide leadership without becoming autocratic. And surprising in what she clearly discounts—wealth, noble birth, or military prowess—in favor of a generous, unpretentious individual whose altruistic nature it is to host weary strangers without thought of reward or reciprocity. Reading between the lines we can surmise that the Dolonci are also seeking an alliance with one of the city-states of mainland Greece as a deterrent to endless depredations by their neighbors. Their quest is suggestive of embryonic Pan-Hellenism and Athenian hegemony. It might also be that the Chersonese nobles cannot unite under the leadership of one of their own, and so inviting an outsider to rule is an effective compromise.¹⁴ Herodotus' account continues:

This occurred during period when Peisistratos had complete political control over Athens. Miltiades son of Kypselos, however, did command a degree of influence and prestige there; his household was wealthy enough to race four-horse chariots, and he was descended from Aiakos and Aegina, but he was Athenian by a more recent ancestor—Philaios son of Ajax—who was the first of this family to become an Athenian. [2] Now this Miltiades was sitting on his front porch when he saw the Dolonci passing by. He noticed that they were wearing clothes that had not been made locally and were carrying spears. He called out to them, and when they drew near offered them lodging and hospitality. They accepted, and after they had been

12. Kypselos was the first tyrant of Corinth who reigned for thirty years until his death in 627. Through his daughter, who married an Athenian, he is the grandfather of Kypselos son of Agamestor, who was archon in 597/6 and great-grandfather of Miltiades son of Kypselos (Shapiro 306).

13. The walking distance from the temples at Delphi to Athens is over 150 kilometres.

14. Remember Athens is still almost a half-century away from any form of democracy.

fed and entertained by him, they revealed everything the oracle had said and asked him to obey the god. [3] As soon as he heard their story, Miltiades consented to their request, since the rule of Peisistratos irritated him and he wanted to get away from it. So he immediately sent an inquiry to the oracle at Delphi, asking whether he should do what the Dolonci had asked of him (Hdt. 6.35.1–3).

Miltiades is interested, but only consents after he too takes the time to consult the oracle at Delphi. Although the Dolonci are seeking a tyrant, Herodotus is going out-of-his way to legitimize Miltiades' invitation to rule. At no time does he seek this power and the two quite separate consultations at Delphi—theirs and his—do not suggest anything but piety and prudence by both parties.

Miltiades in the Chersonese

Herodotus does not say as much, but Miltiades and his hosts the Dolonci can hardly take this step without the benign acquiescence of Peisistratids. Immediately we see Miltiades demonstrating both *xenia* and piety—two Homeric character traits that the Athenian aristocrats in particular at the time of Herodotus' writing consider important and which makes them different if not superior to other Greeks. Herodotus continues his narrative:

The Pythia ordered him to do so, and thus Miltiades son of Kypselos, who had previously achieved a victory at Olympia in the four-horse chariot race, now took with him every Athenian who wanted to participate in his expedition, sailed with the Dolonci to their land, and took possession of it, whereupon the Dolonci who had brought him there established him as tyrant. [2] The first thing he did was wall off the isthmus of the Chersonese from the city of Kardia to Paktye, so that the Apsinthians would be unable to invade the land and cause damage there.¹⁵ This isthmus measures somewhat less than four miles wide, and extending from it, the Chersonese measures something more than 46 miles (Hdt. 6.36.1–2).

Even in the mid sixth century many city-states in mainland Greece are experiencing severe population pressures, so Miltiades likely has little difficulty recruiting not only a bodyguard, but adventurous Athenian citizens, perhaps from good but less well-to-do families, to join him as colonists in the Chersonese. Equally, Miltiades wants to do more with his life than self-indulgently own winning racehorses. For Athens's current tyrant, Peisistratos, this is all fortuitous—he gets a potential aristocratic rival and any number of under-employed citizens

15. Now known as the Bulair Isthmus it lies east of Agora running from Cardia on the Gulf of Soros to Paktye on the Sea of Marmara. The Apsinthioi occupied a region of Thrace directly north of the Chersonese across the Gulf of Soros—presumably this wall isolated any beachheads to the east, so whether their enemies raided by land or sea, this sixth-century defensive wall hindered any attack.

busy rather than idle and out-of-town. And he gets a fledgling Athenian colony to help protect the vital waterway between the Black Sea and the Mediterranean. Having dealt with any threat from across the Gulf of Soros Miltiades goes on the offensive against Lampsacus on the Anatolian side of the Dardanelles where he is promptly, if not ignominiously, captured. Fortunately, he appears to have quickly found friends in high places. From Herodotus' narrative, Miltiades reputation as a thoroughly worthy ruler went ahead of him to the extent that king Croesus soon intervenes on his behalf, and he is released unharmed.¹⁶

Thus by walling off the isthmus of the Chersonese, Miltiades repelled the Apsinthians.¹⁷ Then among all the peoples in that region, he first began a war against the people of Lampsacus.¹⁸ The Lampsacenes, however, set up an ambush and captured him alive. Now Miltiades was highly respected by Croesus the Lydian, and when Croesus learned what had happened to him, he sent a declaration to the Lampsacenes commanding them to release Miltiades, threatening that if they did not do so, he would wipe them out as if they were a pine tree. [2] The Lampsacenes who tried to interpret this message were at first bewildered as to why Croesus had used the phrase "wipe them out like a pine tree" in his threat, but then, after much hard thinking, one of the elders came to the realization of its true significance: the pine alone of all trees does not produce any new shoot once it has been chopped down, but is utterly destroyed and gone forever. So now in fear of Croesus the Lampsacenes freed Miltiades and let him go (Hdt. 6.37.1–2).

Lacking a convenient synchronicity Herodotus and his sources are unable to date this event. But from book 1 of the *Histories*, we know that Croesus reigned for fourteen years from about 560 until his defeat by Cyrus the Great; so, this incident likely occurred late in Croesus' reign but early in that of Miltiades. Whatever Miltiades' previous military experience this defensive wall is important whether future attacks come from the north or across the Dardanelles.¹⁹

16. Croesus may simply be adopting Hogwarts' school motto, "Draco dormiens nunquam titillandus." In this case, imprisonment or execution of an Athenian aristocrat by the Lampsacenes will likely only bring savage retribution from the Greek mainland.

17. Herodotus' readers will discover that in 480 during the second Greco-Persian War the Spartans hastily construct a similar length defensive wall across the isthmus at Corinth to make it more difficult for Xerxes' troops, particularly his cavalry, to invade the Peloponnese.

18. Lampsacus is a city-state on the Asian (Anatolian) side of the Dardanelles Strait.

19. To finally expel the Persians from the mainland after the Greek victories at Plataea and Mycale, Xanthippos is obliged to conduct a long siege of Sestos in 479 (Hdt. 9.114–118).

Miltiades and Darius

Evidently, he also acts as general of the Chersonese forces and therefore vulnerable to the fortunes of warfare; but Herodotus gives only an outline of how Croesus brought the city-states in Anatolia under his control before his military defeat by Cyrus the Great in 547 and the continuing rule of Persia by the Achaemenid emperors: Cambyses II, briefly followed by his brother Bardiya, and then by Darius I.

Whatever else he accomplishes during a thirty-five-year long incumbency, Miltiades maintains a measure of Chersonese autonomy and keeps the small Thracian kingdom free of any permanent Persian garrison. However, Miltiades is not immune from the machinations of the Peisistratids. Even after the death of Peisistratos, exiled members of his family, the Philaidae, may have stayed with him from time to time. Curiously Herodotus does not record his reaction to news of his younger half-brother's murder. Herodotus' comment about Kimon son of Stesagoras proclaiming his Olympic victory in Peisistratos' name and the thanks he got for it are deliberately derogatory. He is cautioning his readers that tyranny easily becomes despotic and is fraught with uncertainty if not murderous treachery.

Kimon, son of Stesagoras, had been driven into exile from Athens by Peisistratos son of Hippocrates. [2] And during his exile he won a race with his four-horse team at Olympia, achieving the same victory that had been won by Miltiades [son of Kypselos], his half-brother by the same mother. At the next Olympiad, Kimon won again with the same mares, but this time gave up his victory so that it could be proclaimed in the name of Peisistratos. By relinquishing his victory, he was able to return from exile to his own land. [3] But when he had won with the same mares yet again, it was his fate to die at the hands of the sons of Peisistratos after Peisistratos was no longer alive. They killed him by placing men at the Prytaneion at night to ambush him, he now lies buried at the entrance to the city, across the road called "Through the Hollow," and the horses that won his three Olympic victories are buried opposite him. [4] The horses of Euagoras of Laconia accomplished this same feat, but no others have ever done so. Kimon's elder son Stesagoras was at the time being raised in the Chersonese with his [step-] uncle Miltiades, while the younger son was with Kimon himself in Athens.²⁰ He was named Miltiades after the Miltiades who had settled the Chersonese (Hdt 6.103.1–4).

From Herodotus' account, bar the ongoing conflict with the Lampsacenes, Miltiades' thirty-five-year rule is largely uneventful. If he treated his hosts unfairly there would have been discontent or perhaps revolt which Herodotus would surely record. Tyrannies are rarely hereditary, but in this instance, it

20. Rebuilt and relocated a number of times over the centuries, but usually on the Acropolis, the Prytaneion is the building formally used by the chief magistrate (eponymous archon)—and serves more like court offices than a town hall.

appears that the Dolonci either solicited or acquiesced in the succession by another Philaid aristocrat as their new ruler. Herodotus writes:

So Miltiades escaped this peril through the aid of Croesus, and later, when he [Miltiades] died childless [circa 519], he handed down both his office and his wealth to Stesagoras son of Kimon, who was his maternal half-brother.²¹ And after his [Miltiades'] death, the people of the Chersonese sacrificed to him with the same rituals that are traditionally used to honor the leaders and founders of settlements; they instituted equestrian and gymnastics contests in which none of the Lampsacenes were permitted to compete (Hdt 6.38.1).

The Chersonese nobles would hardly have honored Miltiades in this way if dissatisfied with their aristocratic Athenian ruler, nor would they have accepted his half-brother's son, another Philaid, as tyrant. This can only be interpreted as a successful rule by an outsider, and is a vindication of the Pythia's selection criteria given decades earlier—which criteria fit uncannily well with Heraclitus' maxim—character is destiny. From Herodotus' account we infer no end to the strife with the city of Lampsacus and indeed the Lampsacenes waste no time in assassinating Stesagoras son of Kimon—Miltiades' half-brother—the new ruler who on his assassination in 517 also dies childless.

During the war against the Lampsacenes, Stesagoras was overtaken by death [assassinated] and was also childless. He was struck on the head with an axe in the city hall by a man pretending to be a deserter, but who was actually a hot-tempered foe (Hdt. 6.38.2).

Miltiades Son of Kimon

Herodotus hints that Athens is watching this unrest in the Chersonese with concern. The grain trade with the Scythians in Crimea and a number of settlements around the shores of the Black Sea is a necessity not a luxury. Given this reliance, the strategic nature of Athenian influence in the Chersonese is obvious.²² Other settlements, particularly those on the Asian side of the Hellespont, the Sea of Marmara, and the Bosphorus—notably Lampsacus—usually hostile to Athenian

21. The genealogy can be confusing, but the patronymics Kypselos and Stesagoras make it clear that their mother, whose name is never given, married twice. Sometimes for additional clarity Miltiades the Younger is listed as Miltiades son of Kimon son of Stesagoras.

22. This waterway—now referred to as the Turkish Straits—separating Asia from Europe is over 200 miles long. The Bosphorus is about 19 miles long, running from the Sea of Marmara to the Black Sea; the sea of Marmara, or Propontis, is about 175 miles long; and, the Dardanelles or Hellespont, about 38 miles long, running from the Aegean Sea to the Sea of Marmara.

interests, can guard or obstruct the passage of merchant shipping at will. Hippias, the Athenian tyrant who has followed in his father's footsteps, loses no time in installing another prominent Philaid, Miltiades son of Kimon, who had served as eponymous archon as recently as 524/523, as ruler in the Chersonese. From Herodotus' account it appears that the people of the Chersonese are not exactly coerced into accepting him, although—perhaps for speed alone—he arrives in a warship rather than a regular Black Sea merchant vessel.

After Stesagoras died in this way, the Peisistratids sent his [younger] brother Miltiades son of Kimon in a trireme to take control of affairs in the Chersonese [circa 516]. The Peisistratids had treated Miltiades [son of Kimon] well in Athens, just as if they had not been guilty of his father's death, which I shall describe in another part of my history. [2] After Miltiades arrived in the Chersonese, he stayed indoors, ostensibly to honor his brother by mourning for him. When the people of the Chersonese learned what he was doing, the most powerful men from all the cities around assembled and set out together to join him and share his grief: but when they arrived, Miltiades had them bound and confined. Miltiades now seized control over the Chersonese, took on the support of 500 mercenaries, and married Hegesipyle daughter of Oloros king of the Thracians (Hdt. 6.39.1-2).²³

That Miltiades son of Kimon does not sense the depth of trust that the Chersonese nobles willingly gave to his uncle, Miltiades son of Kypselos, is obvious. Several factors may be in play. First of all, he was sent there by the Athenian tyrant Hippias—the Chersonese nobles do not choose him and the selection is neither prophesized nor confirmed by the oracle at Delphi. Although his uncle may have died of old age after a long and successful rule, his elder brother is murdered after a very short rule. Was this assassination a conspiracy? Are others planned?²⁴ To secure a powerful ally in the immediate area, one of Miltiades' first measures is to marry Hegesipyle the daughter of the Thracian king, Oloros.

23. Herodotus tells us that the tyrant Miltiades son of Kimon son of Stesagoras married a Thracian princess shortly after becoming the ruler in 516 (Hdt. 6.39.2). However, Herodotus also tells us that his eldest son, Metiochos, who was in command of a trireme, was captured by the Phoenicians when Miltiades was escaping the Chersonese en route to Athens in 493 (Hdt. 6.41.1-3). Perhaps Miltiades was a widower, or had divorced his first wife—Herodotus does not say.

24. Although elected archon in 524/3, his father's murder a few years earlier would make Miltiades wary of anything the Peisistratids said or did. His brother was murdered here; was he sent to the Chersonese to be conveniently murdered, too? It would not matter by whom—a disaffected Chersonese noble, another Lampsacene, or a paid Peisistratid thug—he would still be dead.

Darius' Territorial Ambitions

Evidently there is no prohibition on an Athenian aristocrat taking a Thracian princess—who was certainly not a Hellene, let alone the daughter of a noble Athenian family—as bride, nor vice-versa.²⁵ Herodotus gives few details, but it appears that Miltiades son of Kimon quickly follows in his uncle's footsteps securing some sort of diplomatic alliance or non-aggression treaty with the Persians across in straits in Anatolia. By surrounding himself with a bodyguard Herodotus suggests that he is an unpopular ruler from the start (Hdt. 6.39). But one can surmise that this bodyguard and his confinement of a number of Chersonese nobles is only an initial reaction to the murder of his predecessor and a suspicion that internal Chersonese factions lie behind his brother's assassination. It is also at about this time that Hippias son of Peisistratos arranges for the marriage of his daughter to the son of the tyrant of Lampsacus.²⁶ Whether this marriage alliance helps or hinders Miltiades, Herodotus does not say.

Relationships with Susa and Athens

Athenian audiences, whether reading, being read to, or perhaps listening to a public recitation by Herodotus himself, cannot help but draw their own parallels with the sixth-century political reformer Kleisthenes, who serves as archon during the term immediately preceding that of Miltiades son of Kimon. These men are, of course, from different aristocratic families—Kleisthenes from the Alcmaeonidae and Miltiades from the Philaïdae. Kleisthenes' election to archon in 525/524 suggests that he was born no later than 555/554, but scholars have determined that he was in fact much older and probably born circa 570.²⁷ Kleisthenes of Athens is named after his maternal grandfather Kleisthenes, tyrant of Sicyon, a city-state in the northwest Peloponnese near the Gulf of Corinth.

25. The eldest son of this diplomatic marriage, Kimon, was born circa 510. Whether he participates in the first Greco-Persian War, Herodotus does not say. But during the second Helleno-Persian War he may well have fought at Salamis in 480 and participated in the largely Athenian naval expedition that after the battle at Mycale successfully attacking the Chersonese fortress at Sestos in 479 effectively removing the remainder of Xerxes' invaders from the European side of the Dardanelles (Hdt. 9.117–9.121).

26. Herodotus does not mention this at all, but Thucydides does so in a digression on Athenian history (Thuc. 6.59.3). Doubtless Miltiades son of Kimon is not impressed and may well have suspected that Hippias is preparing a number of safe havens in Persian-controlled Anatolia should he ever be exiled from Athens.

27. Provided that the usual eligibility rules were in effect, if Miltiades is elected *archon* in 524/523 he would have to have been aged at least thirty then and therefore in his mid-sixties, or perhaps older over thirty years later at Marathon.

Just as Miltiades son of Kimon marries the daughter of a Thracian king, Megacles makes a similar dynastic or diplomatic alliance when selecting, or perhaps competing for his bride. In a delightful digression Herodotus tells the story of the year-long betrothal festivities possibly around the year 575 put on by Kleisthenes, tyrant of Sicyon, for his only daughter Agariste (Hdt. 6.129–6.131). Whether it really happened that way is neither here nor there, but the tale has echoes of the mythical competition held by Tyndareus for Helen's hand.²⁸ And given that most marriages are arranged it is telling that in this instance the father has no interest in marrying his daughter to a boorish drunk no matter how advantageous the match. What becomes important for Athenian politics in the sixth century is Megacles (ca. 605–526) is the successful suitor and among their offspring are Kleisthenes, Hippocrates, and a daughter, Koesyra. Another parallel that Herodotus' audiences might discern would be to Peisistratos, who widowed, eventually takes Koesyra, Megacles' daughter by Agariste, as bride thus becoming brother-in-law to a much younger Kleisthenes. However, Peisistratos already has two sons Hippias and Hipparchos from an earlier marriage and has no interest in siring further progeny—and a disappointed and morally outraged Alkmeonid family quickly dissolve their most unhappy and assuredly unfruitful union.

Nor does Herodotus comment on any ongoing relationship between Miltiades and Hippias. But the people of the Chersonese are about to be dragged into military adventures further afield. Given that there are several Chersonese cities—including Sestos and Paktye—on the European side of the straits and Lampsacus is a port city on the Anatolian side, rivalry for control of shipping to and from the Black Sea is inevitable. During the sixth century the Scythians, a nomadic people from an area now known as Ukraine and the Crimea, had raided across the Black Sea, and sometime after his putting down of a revolt in Babylon, perhaps in 513 only a few years into Miltiades' rule in the Chersonese, Darius decides it is time to punish them (Hdt. 4.1.1–2). But he does not embark on this venture unaided.²⁹ Herodotus writes:

In preparation for his campaign against Scythia, Darius sent messengers around his kingdom to order some of his subjects to provide troops for a land army, some to provide ships, and others to build a bridge across the Thracian Bosphorus. Darius'

28. Here Herodotus relies on his audiences' familiarity with Homeric epic and Greek mythology and the range of stories about the search for the most-worthy suitor for the most beautiful woman in the world—Helen of Sparta. Notably the father gives each of unsuccessful suitors a talent of silver as salve for their disappointment—not quite the Oath of Tyndareus, but gratuity enough for them to save face.

29. Scholars differ about when Darius embarked on this punitive expedition. The consensus is the year 513. The Persian tactic differs little from the medieval *chevauchée* where the objective is to cause as much destruction as possible within the enemy territory especially when the opponent's forces, often guerrillas, cannot be drawn into a decisive set piece battle.

brother Artabanos son of Hystaspes pleaded with Darius not to lead an expedition against the Scythians, describing in detail how impossible it would be to deal with them. [2] Although this was good advice, he could not persuade Darius to follow it, and so ceased his efforts. When Darius had completed his preparations, he led his army out of Susa (Hdt. 4.83.1–2).

Raiding Scythia

The cost of good relations with the Persian emperor is supplying his generals with military assistance on demand; and so, Miltiades has to join the proposed Black Sea expedition. Herodotus does not say whether the Chersonese and other Thracian cities had previously suffered depredations from Scythian raids. If so, the costs of supporting Darius' revenge are justified; if not then the raid is a pre-emptive deterrent. Herodotus devotes much of book 4 of his *Histories* to the geography and culture of the Scythian peoples, but whether Darius' intent is simply a raid, or whether he intends a permanent occupation is left uncertain. In any event, Miltiades has a difficult balancing act carefully avoiding the ire of the Persian ruler Darius while ensuring some measure of security for the shipping trade between Athens and the Black Sea.³⁰ Darius marches his army from Susa to Chalcedon where the Bosphorus has been bridged (Hdt. 4.85.1). According to Herodotus, Darius has already sent the Ionians ahead to the mouth of the Danube.

He had earlier sent orders to the Ionians to sail on the Pontus [Black Sea] up to the Ister [Danube] River, and upon their arrival, to build a bridge over the river and wait for him, for the fleet was being led by the Ionians, Aeolians, and the people of the Hellespont [2] So the fleet sailed through the Kyaneai directly to the Ister. After sailing up the river for two days from the sea, they reached the neck, where the Ister's mouths divide and here bridged the river (Hdt. 4.89.1–2).

Herodotus does not say whether the Chersonese forces under Miltiades are part of this advance bridging party. When Darius arrives at the bridge, his first thought is that once his forces have crossed it should be taken down (Hdt. 4.97.1). However, Koes son of Erxandros, a general of the Mytilenians, persuades him to leave the bridge of boats standing and guarded by the men who built it, thus providing a safe return route for Darius's army (Hdt. 4.97.2–6). Darius then directs them to remain on guard for sixty days. Herodotus' narrative continues:

30. From time-to-time temporary floating bridges using anchored boats strung together with cables have been constructed across this waterway which separates Europe from Asia and links the Aegean Sea with the Black Sea. Darius successfully bridges the Bosphorus near Byzantium for his Scythian expedition in 513 and Xerxes bridges the Dardanelles between Abydos and a headland near Sestos in 480 during the second Greco-Persian War using this same technique.

Darius tied sixty knots in a leather strap, called the Ionian tyrants to a conference, and announced to them: [2] “Ionians, let my initial plan for the bridge be canceled. Instead, take this strap and follow these orders: as soon as you see me on my way against the Scythians, begin untying one knot each day. And if you go through all the knots and the days exceed them before my return, sail home to your own lands. [3] But until then, the new plan is for you to guard the bridge of boats and exert every effort to keep it safe and secure. If you follow these orders you will do me a great favor” (Hdt. 98.1–3).

Sixty days passes and Darius’ war against the Scythians does not go as planned; and Darius devises a withdrawal falling back to his floating bridge over the Ister (Hdt. 4.133.3, 4.134.2–4.136.1). Unfortunately, elements of the Scythian cavalry reach the bridge before Darius and address the guards.³¹

“Ionians the appointed number of days has passed, and you do wrong to remain here [4] Before this you lingered on because of your fear, but now you could immediately tear down the bridge and depart with peace of mind: fare well in your freedom, and be grateful to the gods and the Scythians. As for your former master, we shall deal with him in such a way that he will never wage war against anyone again” (Hdt. 4.136.3–4).

Remember Darius has given orders to the effect that they should not stay guarding the Ister crossing beyond the sixty days, so Miltiades is indeed just following orders.

The Ionians then conferred about how they should respond to this advice. Miltiades of Athens, the general and tyrant of the Hellespontine Chersonese, proposed that they obey the Scythians and thereby free Ionia. [2] Histiaios of Miletus was of the opposite opinion. he said that it was because of Darius that each of them now governed his city as tyrant, and if the power of Darius were destroyed, he himself would not be able to keep ruling Miletus, nor would anyone else be able to rule his own city either. For he said, all of their cities would prefer democracy to tyranny (Hdt. 4.137.1–2).

Eventually, the Ionians decide to deceive the Scythians by only dismantling the eastern-most, or Scythian end, of the bridge (Hdt. 4.139). This passage is also Herodotus’ first mention of Miltiades son of Kimon and we learn here that Chersonese forces under his command provide mainly logistical support for the

31. Herodotus names the Ionian tyrants whose forces are left to guard the bridge, a list which includes Hippoklos of Lampsacus (Hdt. 4.138.1). Lampsacus and the Chersonese are Persian allies for this raid, but whether Darius is able to moderate their often-bitter rivalry Herodotus does not say.

invasion.³² Darius' forces evade the Scythian cavalry, make contact with the Ionian rear guard, the dismantled section of the bridge is rebuilt, and the Persians make their way back to Susa. Herodotus writes:

Darius made his way through Thrace to Sestos in the Chersonese; from there he crossed over to Asia by ship, leaving in Europe a Persian named Megabazos as his general (Hdt. 4.143.1).

We learn that Megabazos backed by some eighty-thousand Persian troops has orders to subdue every city throughout Thrace (Hdt. 5.1–5.3), and he is also to capture and uproot the Paionian people (Hdt. 5.12–5.15). After this conquest of Paionia, Megabazos sends emissaries to neighboring Macedon demanding that they swear fealty to Darius (Hdt. 5.17.1).

Persians on the European Side of the Waterway

Doubtless the presence of Persian troops on the European side of the Straits heavily influences King Amyntas' unhappy but unhesitating acquiescence. His sparsely populated kingdom is far too weak to pose a military threat and Amyntas is able to retain a measure of autonomy and avoids his kingdom becoming just part of another Persian satrapy.³³ Megabazos eventually leaves Thrace and returns to Susa. From what happens next, it would appear that the Persians take oaths of fealty from many rulers on the European side of the Straits, but do not leave permanent Persian garrisons. Perhaps a few nobles' children as hostages are deemed sufficient—Herodotus does not say. But in 510 the Scythians, in retribution for Darius' largely unsuccessful punitive expedition against their homelands between the Danube (Ister) and the Don on the north shore of the Black sea, launch a raid on Darius' allies including the Thracian settlements on the European side of the Straits.

32. Scholars dispute this story, principally because Darius would hardly have left Miltiades alive, let alone continuing to rule the Chersonese if he had proposed such a treacherous revolt against the Persian Emperor. Doubtless, the Ionian leaders were uncertain about disobeying direct orders, but they had likely used many of their ships building the floating bridge across the Ister and cannot sail home without dismantling the bridge. Elementary military tactics dictate that you do not place the bulk of your forces on the wrong side of an unfordable river, nor do you let your enemy occupy your line of retreat in force.

33. It is from Herodotus that we learn that King Amyntas' son and heir, Alexander, is appalled at what he interpreted as his father's fear of the Persians leading to Macedonian medizing (Hdt. 5.19).

Then he had fled to avoid the Scythian nomads, who, after having been provoked by King Darius, united their forces and advanced against the Chersonese. [2] Miltiades had not waited for their attack but had fled the Chersonese and stayed away for three years until the Scythians had departed and the Dolonci had brought him back (Hdt. 6.40.1.2).³⁴

Miltiades temporarily flees to Athens, but resumes his rule of the Chersonese when the invading nomads withdraw (Hdt. 6.40). At first sight, from Herodotus' account, this flight looks like cowardice. However, if the Scythians were only interested in getting even with Miltiades, his well-known absence may well have spared his adoptive countrymen the ravages of conflict. Left unexplained is why Darius does not send Persian troops to support his recent allies. Indeed, Herodotus writes very little about Miltiades' rule between his return to the Chersonese in 507 and his final departure some fifteen years later in 493/492. That the peoples in this region bring him back when the Scythian nomads leave suggests that like his uncle, Miltiades son of Kypselos, he is now a popular ruler and a majority support him.

The Ionian Revolt

From Herodotus' account it would appear that Miltiades goes along with, or does not vigorously counsel against, the Ionian revolt, not that his Ionian neighbors would listen. While there is no evidence that Miltiades involves the Chersonese in the ill-advised raid on Sardis which takes place in 498, he takes advantage of the Persian preoccupation with the Ionian revolt to even an old score by raiding Lemnos and Imbros and handing these two northern Aegean islands near the Chersonese over to the Athenians.³⁵

Miltiades son of Kimon had taken possession of Lemnos in the following way. The Pelasgians had been expelled from Attica [during the sixth-century] whether just or unjustly I cannot say, I merely recount what others have told me: Hekataios son of Hegesandros said in his works that they did so unjustly. [2] For he claimed that the Athenians had given the land below Mount Hymettos to the Pelasgianns to reside in as their payment for the wall that had once surrounded the Acropolis. But later, when the Athenians saw how well cultivate this land had become after having been

34. The timeline here is not easy to establish. At the end of the Persian's stalemated Scythian expedition of 513 Darius withdrew west along the shores of the Black Sea making his way through Thrace to Sestos on the Chersonese peninsula leaving behind one of his generals, Megabazos, and eighty-thousand troops (Hdt. 4.143).

35. Herodotus' chronology leaves much to be desired here; whereas scholars do not doubt that Miltiades captures Lemnos and Imbros, they debate when, and some even which Miltiades (Evans 168–170). I follow Evans and favour sometime between 498 and 493, but other dates both much earlier and much later are plausible.

infertile and worthless before, they were seized with envy and a desire to have it back for themselves again. [3] According to the Athenians, however, the expulsion was just, for the Pelasgians inhabiting the area under Hymettos used this land as a base for unjust acts. At that time the daughters and sons of the Athenians used to frequent the Nine Springs to fetch water, since neither they nor any other Hellenes has servants yet. And whenever the daughters would go there the Pelasgians would insult and show their contempt for the Athenians by violating them. And they did not rest with that offense, but were finally caught in the act of plotting to attack Athens. [4] The Athenians say that they proved themselves to be so much better men than the Pelasgians that though they could have killed them when they caught them plotting, they instead simply ordered them to depart from their territory (Hdt. 6.137.1-4).

Expelled from Attica, some Pelasgians settle on Lemnos and from there plot revenge. They raid Brauron during the annual festival to Artemis abducting young unmarried Athenian women to be distributed among themselves as concubines (Hdt. 6.138.1). Later, viewing the culturally Greek offspring as a threat, they decide to butcher all the male children and their mothers. The Pelasgians are cursed for this outrage but ignore the advice of the oracle at Delphi, bragging they will only leave their land when a ship sails with a north wind from Attica to Lemnos in a day—impossible as Lemnos lies far to the north (Hdt. 6.138-139). Many years later, Miltiades sails from the Chersonese to Lemnos claiming that as the Chersonese was synonymous with Attica the oracle is fulfilled. The people of Hephaistia obey but those of Myrina resist until besieged (Hdt. 6.140.1-2). Herodotus shows Odysseus-like guile on Miltiades' part, integrated with equal measures of piety and moral outrage. Miltiades is an Athenian aristocrat, a former archon, but many of these young victims of abduction, rape, and murder are his kinfolk. Miltiades' family, the Philaids, come from the Brauron region of Attica. Accordingly, the Pelasgians' cowardly and sacrilegious behavior in Miltiades' own homeland is an old score far too close to home he will not leave forever unsettled. Herodotus does not record the immediate reactions of either Darius or the Athenians, nor whether the Athenians immediately secure Miltiades' gift by colonizing the islands.

Miltiades' Flight to Athens

Perhaps in light of Athens' strategic territorial expansion in the Aegean, by 493 Miltiades is regarded by Darius as an unreliable ally. Consequently, he is obliged to abdicate his rule of the Chersonese and to seek asylum with his countrymen back in Attica. Nominally allied to Darius he has led Chersonese troops against the Scythians; his dilemma is that he will not lead these same troops against Athens.

Miltiades son of Kimon had only recently come back to the Chersonese, but he was now overtaken by more difficult problems than he had faced two years before this return (Hdt. 6.40.1).

Herodotus' chronology here is a little deceptive; Miltiades may well have been back in the Chersonese for as many as fourteen years.

He then learned, however, that the Phoenician fleet was at Tenedos, so he filled five triremes with all his wealth and sailed away to Athens, setting out from the city of Kardia and going through the Black Gulf [Gulf of Soros]. But as he was passing the Chersonese, he encountered the Phoenician fleet, [2] and although Miltiades himself and four of his ships managed to escape to Imbros, his fifth ship was pursued and taken by the Phoenicians. It happened that the commander of this ship was Miltiades' eldest son, Metiochos, whose mother was not the daughter of Oloros of Thrace, but another woman. [3] The Phoenicians captured him along with his ship, and when they learned that he was the son of Miltiades, they took him inland to the King, thinking that they would thereby gain great favor, since they assumed that this man's father was the Miltiades who had proposed that the Ionians should, in compliance with Scythian advice, tear down the bridge and sail away to their own lands. [4] However, when the Phoenicians brought Metiochos son of Miltiades to the King, Darius not only did him no harm but indeed much good instead. For he gave him a house and possessions as well as a Persian wife, who bore him children who were to be regarded as Persians. Meanwhile, Miltiades left Imbros and sailed to Athens (Hdt. 6.41.1–4).

Whether Metiochos son of Miltiades is a hostage held in luxury is immaterial—dead he is valueless to Darius. Conceivably Darius is thinking ahead and wants both Hippias and Miltiades on his side as potential puppets to leverage opinion and support in Athens.

In preparation for a punitive raid on Eretria and Athens—retribution for their foolhardy participation in sack of Sardis in 498—Mardonios, the Persian general and Xerxes' first cousin, crosses the Hellespont with a large army complete with naval support with orders to subjugate this area of Thrace and Macedon (Hdt. 6.43.3–4). With absolutely no prospect of military support from mainland Greece the inhabitants of the Chersonese medize, as do Alexander I of Macedon and other rulers. Miltiades flees, but Herodotus does not necessarily imply cowardice. If the Persians are after anyone it is Miltiades himself, not annihilation of the Chersonese nobles or the common folk. Choosing abdication over pointless sacrificial resistance by the Chersonese peoples Miltiades sails to Athens and lands right in the hands of his political rivals (Hdt. 6.104.2). Accused of tyranny Miltiades is tried but acquitted and shortly afterward he is elected *strategos* by his tribe. Precisely why these charges are brought against him is uncertain; after all he had been appointed to serve Athenian interests as tyrant of the Thracian Chersonese following the assassination of his brother. Herodotus does not suggest that he sought the position. Alas, the appointment was by

Hippias, Athens' last tyrant, and even after twenty years, to many, still tainted. What exactly happens to his remaining four triremes "filled with all his wealth" Herodotus does not say, but given his family's long absences from Attica his estates may well have presented daunting needs.

This was the Miltiades who had escaped death twice and who had left the Chersonese and was now a general of the Athenians. For the Phoenicians, judging his capture and delivery to the King [Darius] to be of great importance had pursued him as far as Imbros. [2] But he escaped them and returned to his own land, thinking that he was now safe. There, however, his [Athenian] enemies caught up with him and prosecuted him in court for having behaved like a tyrant in the Chersonese. But he was acquitted and escaped them, too, and thus came to be a general of the Athenians, elected by the people (Hdt. 6.104.1–2).³⁶

The First Helleno-Persian War

Miltiades does not have to wait long for an opportunity to serve the Athenian people. During the summer of 492 Mardonios with a vast fleet and a huge land army assemble at Cilecia and move northward along the coast to the Hellespont and then having crossed the straits march through Europe toward Eretria and Athens (Hdt. 6.43). They subjugate the island of Thasos and add the Macedonians to their host as well as all the peoples to the east of Macedon. However, near Mount Athos when sailing west from the Strymonic Gulf around the Chaldice Peninsula, Mardonios loses some three hundred ships and twenty thousand soldiers in a storm before reaching western Macedon. With these fleet losses—warships and transports—along with men and animals Mardonios abandons his march on Eretria and Athens and ignominiously withdraws from the European side of the Straits.

From Miltiades' encounters with Darius, particularly on the Scythian expedition, he must know that Darius will not leave the Sardis raid unavenged. Having already dismissed Mardonios either for bad luck, or failure, or both, in the summer of 490 Darius appoints two other generals, "instructing them to enslave Athens and Eretria, and to bring back the captive slaves into his presence" (Hdt. 6.94.2). Herodotus writes:

After their conquest of Eretria, the Persians lingered for a few days and then sailed for Attica thus applying pressure on the Athenians and fully expecting that they would do to the Athenians what they had done to the Eretrians. Since Marathon was the

36. One of Kleisthenes' many reforms was the annual election of the *strategoí*—one from each of the ten tribes; so Miltiades was indeed elected an Athenian general, but only by *his* tribe or *phyle*.

region of Attica most suitable for cavalry as well as the one closest to Eretria, that is where Hippias son of Peisistratos led them (Hdt. 6.102).³⁷

The Athenians are aware of the fall of Eretria and have been able to repatriate the 4,000 tenant farmers they had offered in aide (Hdt. 6.100.1–3). Herodotus tells us nothing about the debates the Athenians must have conducted in the city about resisting the Persian invasion in terms of who said what to whom, but they make two decisions.³⁸

The first thing the generals did, while still in the city, was to send a message to Sparta by dispatching a herald named Philippides, who was a long-distance runner and a professional in this work (Hdt. 6.105.1).

Arriving there a day after leaving Athens, the herald appeals to the Spartans, saying:

“Lacedaemonians, the Athenians beg you to rush to their defense and not look on passively as the most ancient city in Hellas falls into slavery imposed by the barbarians. For in fact Eretria has already been enslaved, and thus Hellas has become weaker by one important city” (Hdt. 6.106.2).

We should note that the Athenians’ message is Pan-Hellenic and disingenuous; they imply that all of Hellas is now in danger of Persian conquest—quietly passing over the notion that perhaps only two cities are targets for savage retribution for the Ionian sack of Sardis which included troops from both Eretria and Athens. Whether by Persian design or happenstance, the timing of the Persian landing at Marathon could not be worse for the Athenians. As Herodotus points out, the Spartans are about to begin nine-day celebrations of one of their more important religious festivals—the Karneia, a harvest festival held annually in honor of Apollo—and the Spartan army cannot leave the city until the full moon (Hdt. 6.106.3).³⁹

37. Hippias, the deposed tyrant of Athens, who has been living in exile in Anatolia, accompanies the two Persian generals hoping to be reinstated either by treachery by his Athenian supporters within the city, or by the victorious Persians if the city does not surrender.

38. The early fifth-century military context is critical. It is this East-West conflict that provides the opportunity for individuals on both sides to distinguish themselves as great leaders. See authors such as J. F. Lazenby, and Peter Krentz for more detailed discussions.

39. For phases of the moon in antiquity see <<http://www.paulcarlisle.net/mooncalendar/>>. This line from Herodotus has led to much scholarly conjecture about the (Julian) date for the battle. The Karneia was an important nine-day harvest festival in honour of Apollo celebrated near the end of the Spartan year—their New Year commenced with the Autumn Equinox (September 21/22). Scholars differ, but it is critical to use a Spartan rather than an Athenian calendar; accordingly one plausible argument is based on the full moon

Marathon: The Legend

Athens' status vis-à-vis the Peloponnesian League is never defined by Herodotus, but the Spartans are prepared to help. Perhaps this is in Spartan self-interest. Should the Persians invade the Peloponnese the League will react, but for the moment if the Persian raids are limited to looting and burning Eretria and Athens, taking slaves back to Darius and reinstalling Hippias as tyrant the isolationist view might simply prevail that this is justifiable revenge for burning Sardis in the spring of 498. Independent of whether Sparta will help, the other Athenian decision is to muster their own army.

As soon as they heard about this [Persian landing], the Athenians rushed to Marathon to defend it themselves, led by the ten generals, of whom Miltiades was the tenth (Hdt. 6.103.1).

It is at this stage that the Athenians are joined in the field by the Plataeans (Hdt. 6.108.1). They are the only allies to provide support against the invaders.

The Athenian generals were divided in their opinions: some were against joining battle, thinking their own numbers were too few to engage the forces of the Medes, while others, including Miltiades, urged that they fight. [2] So they disagreed, and the worst of the two proposals seemed to be prevailing when Miltiades went up to the polemarch at that time, one Kallimachos of Aphidna, who had been selected by lot for his office as polemarch of the Athenians. It was he who had the eleventh vote, for in the old days the Athenians used to grant the polemarch an equal vote with their generals (Hdt. 6.109.1-2).

Miltiades must know that a long siege of Athens risks betrayal from within—their hoplite army and auxiliaries will be disarmed and enslaved, or butchered without striking a blow. And although the Spartans have promised to help, it is time to show real leadership and not to wait for others. What if the Spartan army travels no further north than the Isthmus at Corinth? Do any of the city-states in the Peloponnese believe that they are threatened by the Persians? But he is only one of the ten generals. He cannot act alone. He appeals to the polemarch.⁴⁰

occurring on 8 September 490. This would have the battle occurring on September 11 and the late-arriving Spartan contingent viewing the battle field on September 12.

40. At this time, early in the fifth-century, following Kleisthenes' reforms, the polemarch, who was almost certainly a member of the aristocracy, was one of ten archons appointed by the Assembly. Scholars debate whether by 490 the *archon polemarchos* was only the titular commander-in-chief. Like the other archons he would have to be aged at least thirty, would serve for only one term, but unlike the *stratego* is ineligible for re-election. Although Kallimachos has been selected by his tribe, he gets his particular post by lot, so he may be an able individual but totally devoid of any military experience or

Miltiades said to Kallimachos, “it is now up to you, Kallimachos, whether you will reduce Athens to slavery or ensure its freedom and thus leave to all posterity a memorial for yourself which will exceed even that of Harmodios and Aristogeiton.⁴¹ For from the time Athenians first came into existence up until the present, this is the greatest danger they have ever confronted. If they bow down before the Medes, it is clear from our past experience what they will suffer when handed over to Hippias; but if this city prevails, it can become the first among all Greek cities. I shall explain to you how matters really stand and how the authority to decide this matter has come to rest with you. We ten generals are evenly divided in our opinions, some urging that we join battle, others that we do not. [5] If we fail to fight now, I expect that intense factional strife will fall upon the Athenians and shake their resolve so violently that they will medize. But if we join battle before any rot can infect some of the Athenians, then, as long as the gods grant both sides equal treatment, we can prevail in this engagement. [6] All this is now in your hands and depends on you. If you add your vote to my proposal, your ancestral land can be free and your city the first of Greek cities. But if you choose the side of those eager to prevent a battle, you will have the opposite of all the good things I have described (Hdt. 6.109.3–6).

Kallimachos’ is unaware that he is being manipulated, but the appeal to *kleos*—“leave to all posterity a memorial for yourself”—is effective.⁴² Miltiades is also aware that opinions among Athenians are divided. Whether Hippias’ reinstatement dreams are realistic or not, there are some in Athens who believe that they can negotiate an advantageous and personally beneficial arrangement with the Persians.

Miltiades’ arguments persuaded Kallimachos, and when the Polemarch’s vote was added to the tally, the decision was made to join battle. And afterward, the generals in favor of the battle each in their turn ceded their day of command to Miltiades when the day came around for each to be in charge. But while Miltiades accepted

pro prowess. Either way, Herodotus believes that the polemarch holds the tie-breaking vote should be *strategoí* be deadlocked.

41. At that time this comment is mildly flattering as these two men—“legendary tyrant slayers of Athens” *eleutherioi* and *tyrannophonoi*—were responsible for assassinating Hippias’ brother Hipparchos in 514—hardly legendary in 490, but obviously more so fifty years later when Herodotus is writing. But shortly following Peisistratos’ death in 527 his two sons were responsible for the assassination of Miltiades’ father, Kimon, son of Stesagoras.

42. Complete *archon* lists of all ten *archons*—one representing each tribe—for the early fifth-century are no longer extant. By 487/6 each tribe would select ten candidates, then one of these from each tribe would be chosen by lot, and then these candidates would cast lots for the several functions including eponymous archon, polemarch, and so on (Sealey 204). Nor have the names of the other nine generals for the year 490/89 survived. Herodotus writes that the *polemarch* was selected by lot, which suggests that even in 490 the candidates for the board of *archons* did not know which post they would eventually hold.

this, he would not make the attack until it was his day to preside (Hdt. 6.110).⁴³

Delaying giving the order to attack until it was his day to preside Herodotus suggests that Miltiades is prepared to accept sole responsibility for the outcome—glory or ignominy. It also suggests prudence—once a battle starts events change demanding that early plans be jettisoned—right or wrong he will need instant obedience not debate. He knows half of his generals are reluctant to engage and these *stratego*i did not cede him their turns to preside. Over the years Miltiades has learned enough not to risk being outgeneralled.

An Unexpected and Decisive Victory

The course and result of the battle need little retelling. Herodotus' account, which is also the earliest extant, is given in the closing chapters of book six (Hdt. 6.111–6.116). Modern military historians do not depart dramatically from his account which credits Miltiades with implementing the strategy of meeting the Persian invaders at their Marathon beachhead a full day's march north of Athens. Miltiades, who has likely never previously commanded a large hoplite army, is also credited with the tactic of rapidly advancing in close formation across the plain and dashing, shields held high, over the last stadia when the Greek infantry become within lethal range of the Persian archers.⁴⁴ Never satisfactorily explained, the much-feared Persian cavalry is never a factor. But Miltiades' Philaid family gained fame in the sixth-century breeding racehorses; perhaps Miltiades, with some equestrian expertise, gambles that the Persian mounts, after transportation by sea across the Aegean might need several weeks to acclimatize to different water and forage? We know little, except that Herodotus does not mention their cavalry at Marathon.

One of the Persian's military strengths is their light cavalry. Although cavalry units are effective against broken infantry in open terrain—the Greek phalanx

43. According to Herodotus the armies are at a standoff for several days, but the decision to attack the Persians is taken by Miltiades. The tactic of deploying the phalanx with strong wings and a weak centre may simply have been the necessity to match line lengths. No matter whose idea, and remember Miltiades had never commanded a hoplite army of any size, it was adopted and when both Persian flanks retreated under pressure the two Hellenic wings rotated back to support the centre.

44. Since Kallimachus was killed on the battlefield and Miltiades' son, Kimon, subsequently becomes the most influential man in Athens in the 470s and 460s, one suspects that Miltiades' image as the victor of Marathon also owes much to the accretions of family influence and tradition. Nevertheless, although the *stratego*i are elected by their tribe, in times of war, the tribe will likely only consider candidates of some military competence—everyone is further ahead if the social *dilettante* wait for peaceful times before showing their interest.

usually does not break and indeed Greek commanders choose their battle locations with this in mind.⁴⁵ Moreover, animals need water and fodder—both in short supply in Attica—indeed alfalfa, now quite ubiquitous was introduced to the Greek mainland inadvertently by the wayside droppings from Xerxes' horses. The Persians' other major weakness is reliance on their allies for naval support. That it is difficult to reconstruct this particular battle from Herodotus' abbreviated account alone should not be surprising—many in his audience were participants or have relatives who were there. And as an infant at the time and living on the Anatolian side of the Aegean, he was not involved. Sources for details of the land battles Herodotus describes in his *Histories* are restricted to surviving participants; there are no privileged non-combatant observers, and Herodotus has to piece together what really happened from many independent sources—ideally from both Greek and from Persian or Persian allies. No matter, after the defeat at Marathon, those who might have betrayed their city reconsider and the Persians withdraw.

Hubrys and Impiety

As the Spartans observed decades earlier, the Athenians are an ungrateful people (Hdt. 5.92.2).⁴⁶ The euphoria over the unexpected and lop-sided victory over the Persian invaders does not last long. Miltiades comes from an influential wealthy aristocratic Athenian family, which means that enmity among other powerful aristocratic families is never far beneath the surface. Herodotus writes:

Though previously Miltiades had been held in high esteem by the Athenians, after the defeat of the Persians at Marathon he gained even more power and influence. Thus the Athenians were thrilled to grant his request when he asked them for seventy ships, an army, and some money, without revealing against what country he would lead these forces; he claimed, however, that he would make them all rich if they followed him, because they were certain to gain much gold from the land to which he would lead them—at least that's the sort of thing he told them as he asked for the ships (Hdt. 6.132).

Herodotus does not tell his audience why Miltiades wants to attack Paros; let alone why he chooses not explain his strategy to the Athenians. Is Miltiades now

45. Remember Persian cavalry are in fact unarmoured mounted archers, armed with composite bows, arrows, javelins and short swords for defence.

46. Again we must ask—who are the ingrates? The most likely candidates are from that segment of society that a contemporary American political aspirant arrogantly and contemptibly dismissed as *the deplorables*—those members of the demos always cash-strapped and in this case those who signed up to crew the triremes and who were doubtless relying on their pay as oarsmen to get them out of debt.

looking down on those who look up to him?⁴⁷ The Paros attack closely follows his victory at Marathon, but everyone is aware and remembers that in 490 the Persian invasion fleet of 600 triremes and horse transports sail unhindered across the Aegean by island hopping. Herodotus writes:

So the newly appointed generals [Datis and Artaphrenes] left the King and set out on their journey. They went first to the plain of Alcion in Cilicia, bringing along a huge and well-equipped land army. As they camped there, all the ships that had been levied from the various districts arrived to join their forces, as well as the horse-transport ships which Darius had ordered his tribute-paying people to prepare the year before. [2] After putting the horses on board these ships, the land army embarked, and the expedition sailed to Ionia with a fleet of 600 triremes. From there, instead of keeping their ships close to the mainland and sailing toward the Hellespont and Thrace they set out from Samos, went past Ikaros, and made their voyage through the islands (Hdt. 6.95.1–2).

Herodotus explains that Naxos had not yet been conquered. The Naxian islanders flee but are caught and enslaved and Herodotus mentions that the Persians set sail for other islands (Hdt. 6.96). The Delians—Delos is adjacent to Paros—flee to Tenos (Hdt. 6.97). But the Persians sail from Delos and put in at other islands—presumably including Paros—where they take hostages and enlist others to join their forces (Hdt.6.99).

One way to ensure that Darius does not repeat this strategy is to deny him military use of the Cyclades and for that Athens must be sure of their continued allegiance. Lacking a navy to challenge the Persians at sea, swift punishment for medizing is a clumsy deterrent of sorts. And so, Pharos, like Aegina, must not so easily fall under Persian control again.

So Miltiades took command of the army and sailed for Paros, on the pretext that the Parians had initiated a conflict by earlier contributing a trireme to the Persian forces at Marathon.⁴⁸ That was his excuse, but actually he bore a grudge against the Parians because Lysagoras son of Teisas, a Parian by birth, had maligned him to Hydarnes the Persian. And so Miltiades sailed out, and when he arrived at Paros, he laid siege to the city while the Parians confined themselves within their city walls. Then he sent a herald to demand 100 talents from them, saying that if they did not give him the money, he would not permit his army to withdraw until it had completely destroyed

47. Herodotus' readers will recall that in 506 the Spartan dyarch, Kleomenes, makes the same secretive miscalculation when he "mustered an army from the entire Peloponnese without stating his purpose"—that they were going to punish the Athenian people (Hdt. 5.74).

48. Paros which lies west of Naxos in the Aegean Sea is one of many islands among the Cyclades group and is some 160 kilometres (as the crow flies) south-east of Athens. The Persian invasion forces reach mainland Greece by island hopping from southern Anatolia subjugating Paros and other islands in turn as their armada of triremes and transport ships progress north-west toward Eretria and Athens.

them. [3] The Parians had no intention of giving any money to Miltiades, and instead began to devise strategies to protect their city; in particular, they set to work at night to double the original height of their wall wherever it had recently proved to be vulnerable (Hdt. 6.133.1–3).

Herodotus' criticism is directed at the Athenians; they accept Miltiades' promise of riches to share among the *demoi*, just as they had been won over by Aristagoras some ten years earlier (Hdt. 5.97). The Athenian motivation is naked greed rather than a noble quest for justice or future security.

That much of the story is related by all the Hellenes, but from here on, the Parians say that what happened is the following. Miltiades was at a loss as to what to do next; but then a captive slave woman named Timo, who was a Parian by birth and a temple servant of the goddesses of the underworld met with him and told him that if the capture of Paros was of great importance, he should follow her advice. [2] After hearing her counsel, Miltiades went to the hill that lies in front of the city and, since he was unable to open the doors, leapt over the wall enclosing the sanctuary of Demeter Thesmophoros. Then once he had jumped to the inside, he went toward the hall of the temple in order to do whatever he intended within, perhaps to remove some object that was not supposed to be moved or maybe to do something else. As he approached the doors [of the temple], however, he was suddenly overcome with trembling and ran back the way he had come, but as he jumped down from the wall, he badly twisted his thigh, though other say he injured his knee (Hdt. 6.134.1–3).

Alledged Impiety and Demise

The conclusion of Herodotus' story about Miltiades has Homeric echoes of the theft of the Palladium from Troy. The Greeks take matters of impiety seriously—it is a capital offense—any skepticism is buried under a fifth-century version of Pascal's Wager: Ignoring a prophecy being as foolhardy as not taking the time to consult one of the oracles for guidance in the first place.

When the Parians found out that a temple servant had provided guidance to Miltiades, they wished to punish her for it, so they sent sacred delegates to Delphi as soon as they had obtained a respite from the siege. The question they sent to Delphi was whether they should put to death the temple servant of the goddesses because she had instructed their enemies on how to capture her native land and had revealed sacred matters to Miltiades that were not to be disclosed to any male. [3] The Pythia would not permit them to do this, saying that it was not Timo who was at fault for what happened; that Miltiades was destined to end his life unhappily and that Timo had appeared in order to start him down the path to its bad ending (Hdt. 6.135.2–3).

Throughout his *Histories*, Herodotus is careful to include reference—doubtless very selective—to those prophesies sought by the protagonists and their adversaries.

So Miltiades sailed home in a sorry state; he was bringing no money for the Athenians, nor had he added Paros to their territory, despite the fact that he had besieged it for twenty-six days and laid waste to the island (Hdt. 6.135.1).

There is another element at work here. Throughout his *Histories* Herodotus is carefully pursuing the Heraclitan notion that individuals are responsible for their own actions—good or ill. But the Greek religion still has a very Homeric element of communal responsibility, in which the impiety of one individual can jeopardize the well-being of a much larger group. But the expiation of the transgressions of this one offending individual can restore the favor of the gods to all.⁴⁹

Herodotus shows Miltiades at a pinnacle of popularity after Marathon, but he also shows his audience that this pinnacle can become either a plateau or a precipice and that any act of impiety can have immediate and disastrous consequences. Within a year of his triumph at Marathon Miltiades is on trial for his life a second time. This time the fault is his recent unsuccessful campaign against the Parians and the deceit he used to gain authorization for the punitive raid. Found guilty, his life is spared, but despite being bedridden with a battle wound turning gangrenous he is fined—and imprisoned until this is paid (Hdt. 6.136.3).⁵⁰ Although his young son Kimon, perhaps aged only twenty, eventually clears the debt—he is too late—his father, the hero of the miraculous Athenian victory over the invading Persian armies has already died miserably and utterly disgraced in prison.⁵¹

49. The rape of Cassandra, who had taken sanctuary in a temple to Athena, by the Lesser Ajax comes to mind. The Greek leaders do not heed Odysseus' advice that the offender be stoned to death and Athena—although she supported the Greeks against the Trojans—requests the aid of Zeus and Poseidon in search of revenge for this outrage. Roughly translated as impiety (ἄσέβεια) *asabeia*, it is difficult to define in modern terms, but in the fifth and fourth-centuries is a capital offence.

50. The whole affair is clouded in mystery; Miltiades' pretext for attacking the island (Paros) is that the Parians had supported the Persians at Marathon, but Herodotus suggests that there was also a personal grudge Miltiades wished to settle, perhaps a notable example of why not to mix state business with pleasure (Hdt. 6.133.1).

51. Fifty talents of silver is an outrageously large fine; there are 6,000 drachmas to the talent, so the fine is equivalent to 300,000 drachmas at a time when the daily wage for a skilled worker was one drachma at most. But it might also approximate the cost of the venture—70 triremes, each with a crew of 200, for 30 days, paid at a half-drachma a day amounts to some 210,000 drachmas. Since the Attic standard talent is about 25.9 kg the fine imposed is well over a tonne of bullion. The Philaid (sometimes described as the Kimonid) dynasty is continued by Miltiades the Younger's son, Kimon (c. 510–450).

Now when Miltiades returned home from Paros, he was the subject of much discussion among the Athenians. One in particular, Xanthippos son of Aripbron, brought him to court to be tried by the people on the capital charge of having deceived the Athenians. [2] Miltiades, though present, did not speak in his own defence, for he was incapacitated by his thigh, which was now infected. So as he lay there on a couch, his friends and relatives spoke on his behalf, recounting at length the battle of Marathon and how Miltiades had conquered Lemnos and given it over to the Athenians to punish the Pelasgians. [3]⁵² The people sided with him to the extent that they released him from the death penalty, but they fined him fifty talents for his offense. After the trial, gangrene developed in Miltiades' already infected thigh, and ended his life. His son Kimon subsequently paid off the fifty talents (Hdt. 6.136.2–3).

Conclusions

Herodotus has a warning here, the Athenian reaction to their victory at Marathon is naïvely short-sighted. Punishing those city-states who medize with heavy fines in gold and silver bullion, or razing their cities to the ground is only exchanging one promise of oppression for the certainty of another. Pan-Hellenic ambitions are founded on common interests not threats of crippling fines or assured destruction. Herodotus' readers will readily see that Themistocles' scheme of building a powerful Athenian navy which will deny the Persians free use of the Aegean Sea means that Athens can offer meaningful protection rather than threats to her potential allies. Luckily for the Athenians, this time around, Darius' generals make tactical mistakes at Marathon—mistakes the Persians will learn from and not repeat when they come again. Very few Athenians recognize that there will be a next time and that next time things will be very different.

Having failed in court a few years before Marathon, Miltiades' political enemies finally get a capital charge to stick. If he had successfully coerced the Parians into parting with the one hundred talents demanded as reparation for their medizing—two metric tons of silver bullion—no such trial would have been held—greasing greedy Athenian or other palms with silver usually erases all manner of presumed iniquities.⁵³ But the Paros revenge raid is a fruitless and expensive failure and at times such as this Miltiades needs more than a little help

52. A date in the mid 490's for this conquest and generous territorial gift of strategic importance—he would not have the resources to garrison the islands—would strengthen the case that Miltiades' friends make at the trial that his governance of the Chersonese was always to Athens' advantage and that he should be treated as an Athenian benefactor.

53. This is just expedience. Herodotus is unable to conceal a measure of religious / judicial scepticism here. Cicero's treatise from the first century *On the Nature of the Gods* comes to mind, where he criticizes state-sponsored religion for substituting religious awe when other pressures fail—a slippery slope to state-sponsored religious corruption (Cic., *Nat D.* 1.117–118).

from his friends.⁵⁴ Help comes from his son, but—too late. For any tyranny to be a success there must first be a pressing need for this form of uncompromising leadership, and then an exceptional candidate to fulfil that role. Both conditions are necessary, and we can gauge the success of the short Philaid dynasty in the Chersonese accordingly.

Acknowledgments

The author gratefully acknowledges the patient guidance during preparation of this article of Dr. Dionysia Eirini Kotsovoli of the Stavros Niarchos Foundation Centre for Hellenic Studies, Lecturer, Department of Global Humanities, Simon Fraser University, Canada.

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54. Many have knowingly or unknowingly paraphrased Tacitus from the first century "Inquissima haec bellorum condicio est: prospera omnes sibi indicant, aduersa uni imputantur." John F. Kennedy said as much on April 21, 1961 about the Bay of Pigs fiasco, "Success has a thousand fathers, but failure is always an orphan."

Giftedness and Swedish Exceptionalism? Gifted Pupils in Primary and Compulsory School, 1842–2022

By Glenn Svedin *

Giftedness in school has in the twenty-first century grown as a field of research in Sweden. Some claim that giftedness and gifted children's needs were long ignored by the education system for historical and cultural reasons, and it is only in the past two decades that a slight change in view has occurred so talented pupils' learning has been highlighted. In this article, this often-reproduced image is questioned. Instead, taking a longer educational, historical perspective, is it argued that as early as the nineteenth century the authorities took some account of differences in talent; that giftedness received a great deal of attention from the state after the First World War; that the need to adapt education organizationally or pedagogically to pupils' different giftedness was extensively covered in the first two curricula of the new compulsory school system in the 1960s; that the authorities required schools to adapt their learning activities to the needs of gifted pupils; that these views and demands rested on contemporary research and school commissions; that the Swedish school system's growing segregation and decentralization since 1990 has meant that the curricula thereafter are now significantly vaguer than the earlier ones regarding giftedness; and finally, that there today is a significantly greater risk than in the 1960s–1980s that the needs of gifted pupils are forgotten.

Introduction

In Sweden, gifted children's education has received far greater attention – from researchers, school politicians, the National Agency for Education, teachers, and parents – in the last 25 years. A widespread perception among Swedish researchers in education is that gifted children for a long time went unnoticed in Swedish compulsory school or the school curriculum, and that it was only in the 2000s that the authorities finally recognized gifted pupils' needs. This long tradition of ignoring the gifted has been put down to Swedish society's focus on equality, and research has claimed that in Sweden it was historically considered ugly to be considered as more theoretically gifted or talented than others, or to request or receive teaching in school adapted to a particular gift.

In this article I apply a historical perspective to how the state – meaning the government and Parliament – reasoned about giftedness and gifted pupils' learning through the medium of the school curriculum from 1842 to 2022. The overall purpose is to increase the understanding of Swedish society's approach to giftedness in school, past and present. The research questions are what approaches

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to giftedness were evident in the elementary school curricula of 1842–2022 and what opportunities to adapt teaching have been demanded or made possible?

Beginning with a literature review and the Swedish state of the art, I consider the central theoretical concepts that guide the analysis of the official documents, setting out the methods and material. The empirical investigation is then presented chronologically. The results are presented by period – 1842–1919, 1919–1962, 1962–1994, and 1994–2022 – with the periodization marking significant changes in views, approaches, organization, and adaptation for gifted pupils. The results for all four periods are presented in the same way, with a presentation of the era and its curricula, a content analysis of the curricula, and a discussion to put the findings in context.

Literature Review

There have been few scientific studies of giftedness in the Swedish education system; however, that interest has grown in recent years. Several researchers claim that the question of giftedness and gifted pupils' learning has never interested the Swedish authorities, researchers, or schools. Swedish society's ambitions for equality after the Second World War have been given as the reason (Persson, 1997, 2010, 2014, 2017, 2021; Persson et al. 2000; Edfeldt 1992; Wistedt & Edfeldt, 2009; Wikén Bonde, 2010; Wistedt & Sundström, 2011).

For example, Edfeldt (1992) claims that in Sweden it is considered undemocratic to be intellectually gifted and to receive or ask for teaching adaptations according to one's giftedness. Edfeldt relates this view to social-democratic egalitarian aspirations. The researcher who has contributed to the tenacity of this idea is Persson. In the past 25 years he has repeatedly emphasized, first in his thesis and then in several subsequent publications, that collectivism, egalitarian ambitions, and the unwillingness of those in charge to admit that some people may be more theoretically gifted than others, has seen gifted children's needs overlooked in Sweden, a country he therefore describes as 'Different' (Persson, 1997; see Persson 2010, 2014, 2017, 2021; Persson, et al. 2000). Persson (2017, p. 8) also claims it was the conservative government's amendment in 2010 to the Education Act that first made it 'legally possible for school to also include gifted children'.

Other researchers have put forward similar views. Both Wistedt (2005; Wistedt & Edfeldt, 2009; Wistedt & Raman, 2010) and Engström (2005) claim that the attitude too gifted children in mathematics changed for the better in the 2000s, which enabled schools specially to cater to gifted math pupils. Pettersson (2011) claims that researchers' lack of interest in giftedness should be understood in terms of culture. Melander (2021, p. 13) believes that in recent years it 'may have become less taboo to talk about giftedness in school' and the 1994 compulsory school curriculum's statements 'that all students should receive support at "their level"' was relatively new. Melander also claims that in the past there was solid

opposition against schools making adjustments for gifted pupils, ensuring it excelled at that in an international context, with Swedish politicians even making fun of gifted children.

However, there is some research, even if it does not primarily concern giftedness, which paints a slightly different picture. Vinterek (2006) has shown the compulsory school's first curricula were significantly more detailed on individualization than subsequent ones. Marklund (1985) and Lindensjö and Lundgren (2018) have shown that issues of differentiation were raised in the school reforms in the 1950s and 1960s. Axelsson (2006, 2007, 2012) has studied the education system's handling of giftedness in the first half of the twentieth century, finding not only that pupils were categorized and sorted by intelligence, but that opportunities for differentiation were numerous, and that intelligence tests and special classes were used. He also shows there were indeed academic and political discussions about how to educate high-achievers and gifted pupils, and the notion of giftedness in schools was still very much alive in the mid twentieth century. There is thus a research gap starting in the mid twentieth century, and especially for primary schools in the period 1962–1994. This article therefore focuses on that period.

International research of the history of giftedness relevant to the Swedish context shows the importance many countries placed on giftedness and intelligence, and how school officials and politicians tried their best to identify the gifted, talented pupils and move them on to higher studies (Tannenbaum, 2000; Gallagher, 2000; Wooldridge 1994, 2022). Margolin (1993, 1994) has applied a Foucauldian perspective to education systems' approaches to giftedness and discusses how researchers of gifted children have created groups of people designated as exceptional in various field. Margolin argues that advantaged parents and researchers have come together to secure special educational paths for children they perceive as gifted and talented – with financial resources redistributed to pupils who already are advantaged, at the expense of resource-poor parents and children. Probolus (2020) analyses discourses about giftedness from 1920 to 1960 and argues that various 'experts', usually psychologists, encouraged parents to become more involved in their children's education and to recognize that they indeed had special gifts. She also claims that universities spread the idea that gifted children were neglected in school, and that a particular subgenre of literature advised parents on how to raise their purportedly special children.

Broadly speaking, the international literature confirms the significance accorded to intelligence in the twentieth century. There was a felt societal need to identify exceptional children and educate them to be members of the economic, political, cultural, scientific, or military elite. This seems to have been a transnational development, and research-wise relatively well covered. Were Swedish views on giftedness – before the relatively recent steps taken by the government – so very different to other developed countries in the twentieth century? From a historical

perspective, questions about the education of gifted pupils in Swedish schools need further research, and the existing explanations and approaches outlined here require nuance. But first, what of the notion of giftedness itself?

Theoretical Perspectives

The concept of giftedness is controversial. To start with, there is no international, officially agreed definition. Under the influence of American research, the term 'gifted' is often used, and I have followed suit. However, similar or synonymous terms to capture giftedness or gifted people exist, such as high achievers or highly able, talented, exceptional individuals. What all these terms have in common is that they have been questioned, debated, and interpreted differently (Ziegler, 2010; Pettersson, 2011; Silverman, 2016; Sims, 2021).

Legislators and researchers have differing views on what giftedness means. Gifted pupils are sometimes mistaken for high achievers, or is the two terms, wrongly, seen as synonymous, as seen from the literature. A high achiever is often regarded as a pupil who easily achieves knowledge goals. It can be due to other factors than intelligence, for example hard work, stimulation, or well-being. A gifted pupil can be a high achiever but can also underachieve or be absent from school due to for example dislike or poor teaching. Giftedness is thus usually defined based on intelligence. The pupil is considered to have a special aptitude, talent, or gift, whether in music, mathematics, or languages (Westling Allodi, 2015; Melander, 2021; Sims, 2021). Where the boundaries are drawn between different levels of giftedness or intelligence obviously determines how many in an age group that will be described as gifted pupils. The group thus varies in size depending on the definition of the term.

Schools' adaptation for gifted pupils can be organizational or pedagogical. In the case of organizational differentiation, the school is organized in some part, largely, or wholly by giftedness. Examples are tracking, ability grouping, and coaching. Pedagogical differentiation can be understood as focusing on acceleration and enrichment. Acceleration means that pupils can take classes faster and finish their education sooner, use teaching materials and tasks intended for higher years, skip years, or start school early. Enrichment means that pupils broaden or immerse themselves in a subject they have a particular aptitude for (Dahllöf, 1967; Hadenius, 1990; Lundgren, 2002; Jahnke, 2015; Sims, 2021; Mellroth 2021; Margrain, 2021). The differentiation toolbox thus contains a variety of organizational and pedagogical tools. I will soon demonstrate the tools used historically and today in Sweden, but before the source material will be presented.

Materials and Method

The Swedish state's perceptions of its schools can be found in several types of written source material. The single most important factor in regulating schools is the curriculum. Each usually presents an idea of reality in which the government states how schools should be and why. All curricula have a normative claim and an ideological dimension. It is the state that determines the approach, even if school practitioners share that view. The implementers – principals, teachers, and others – should at least outwardly be positive towards the values in the curriculum and should believe in the methods and recommendations it suggests or requires. This may be the universal view in society of how education should be organized and implemented, but it is rarely the case in reality. Instead, there are often competing views, and what was once questioned or perhaps not even stated may later become something taken for granted. Paradigm shifts occur, and a revised or wholly new approach can end in the development of a new curriculum (Alcoff, 1991; Pickering, 2001; Vallberg Roth, 2001; Wahlström, 2002; Folke-Fichtelius, 2008; Lindensjö & Lundgren, 2018). Thus, to identify the state's approach to gifted pupils it is necessary to analyse curricula. Comparing curricula texts to show that changes, or even paradigm shifts, have occurred is one thing; explaining it is something qualitatively different. For that, the contemporary context must be included in the analysis, hence the extensive contextualization of my results here.

It is vital in historical research to grasp not only the contemporary context when a curriculum was written, but also a curriculum's intertextuality – was meant by a specific word or concept at that time (Marjanen, 2018). Language changes over time, and concepts in use today, such as gifted, differentiation, coaching, enrichment, or acceleration, will not necessarily be found in older governing documents, or even in today's curricula elsewhere in the world. Similar or synonymous terms may also have been used. This is why not just the existence of the ideas but their content must be discussed. For example, the state may not refer to gifted pupils, but instead to talented, intelligent, or extremely intelligent pupils, so it is necessary identify also such terms in the sources.

In this study, education acts and Swedish Government Official Reports (SOU) are also considered, but the main sources are the official curricula from 1842–2022, which are analysed with qualitative content analysis, and the terms discussed above have been extracted from the source material for analysis.

Finally, a reminder about the limitations of the study: it is the long historical lines of giftedness, which have been analysed here, not what was actually done in school. How gifted pupils were taught and why; how gifted pupils, their parents, or teachers experienced the school's teaching; what teacher training schools said about giftedness: all this lies outside the scope of this article.

Results

1842–1919: Ignorance and Segregation

In 1842, the *folkskola* (lit. people's school) or primary school was introduced to provide a basic education for Sweden's children. The first School Charter came the same year, replaced in 1882. The first curriculum was issued in 1878, followed by new curricula in 1889 and 1900.

For the first two decades primary schools were run by the local council for the parish, but with the 1862 local government reforms the church council took over the running, and it was only in 1930 that local school districts resumed responsibility for the primary schools. At first, the number of years schooling was not regulated, but in 1878 it was set at six or seven years. In practice it was not until the early twentieth century that the education system grew to the point where most children attended school for most of the year (Richardson, 2010).

There are no direct statements about giftedness in the nineteenth-century state schools' governing documents. Such few statements as might be said to concern talent in some ways are addressed here. The legislation of 1842 called on the new schools to encourage and reward pupil achievement, while 1882 allowed for acceleration (School Charter 1842; School Charter 1882). That possibility was also mentioned in the first two primary school curricula in 1878 and 1889: pupils could be moved to a higher class or leave school if they were considered to have met requirements (Normalplan 1878, 1889). Acceleration has remained an option under Swedish law since then. In the primary school curriculum issued in 1900, which pertained until 1919, some aspects of giftedness were introduced. The curriculum required teachers to adapt their teaching according to each pupil's progress, meaning schools were to differentiate their education for individual considerations. Individual work was recommended as a suitable method (Normalplan, 1900).

How then are these writings to be understood? Different levels of intelligence, and measurements thereof, had attracted attention in the later the nineteenth century, but interest soared after the turn of the century. Primary school was for the poor, with minimal opportunities for extra teaching for gifted children from the working class; better-off children went instead to private schools or secondary schools (*läroverk*). Neither did primary school give its pupils direct access to higher education. In reality, gifted working-class children had thus little opportunity to continue their studies. Improving the opportunities for poor but talented children was however not something that interested the authorities in the nineteenth century. The primary school existed mainly to discipline, inculcate Christian values, and teach basic reading, writing, and math skills. That was considered enough. Future politicians, civil servants, and business leaders continued to be recruited from other educational institutions. The limited opportunities for gifted working-class children upset some politicians, such as Fritjuf Berg, who launched radical

ideas for school reform. In 1883, he proposed that a joint lower school should be created and that pupils, regardless of background, should attend the same school, making it possible for poor but gifted pupils to get a good education. His ideas met stiff resistance along the rigid class lines of the time (Axelsson, 2006; Richardson, 2006, 2010). However, adapting the primary school's organization and teaching to accommodate pupils' gifts, needs, and talents was increasingly discussed in the decades after the turn of the century. Those thoughts came in to play in the next curriculum.

1919–1962: The Gifted but Poor

Starting in the later nineteenth century, Swedish society underwent radical change, economically, socially, scientifically, and politically, something which had a direct impact on educational policy. More children went to school and for longer, and more voices were raised about the need for a better education for gifted working-class children. These developments meant that aspects of giftedness were more prominently addressed in the 1919 curriculum, which had taken ten years to draft (Axelsson, 2006; Richardson, 2010). It was, by Swedish standards, very long-lived. It was not until 1955 that a new curriculum was introduced, although that only lasted a few years because in 1962 primary school was replaced by the compulsory school (*grundskola*).

The curriculum of 1919 noted the existence of different forms of giftedness. It also required schools to offer differentiated teaching and to adapt tasks for the gifted. Pupils' varying needs, levels of performance, and talents were to guide that adaptation. Enrichment, acceleration, and ability grouping were the methods it highlighted, with for example more demanding tasks and more courses. The possibility of leaving school by taking an exit test was retained (Undervisningsplan, 1919; Ekholm, 2006). Despite this, the school system in Sweden continued to be divided organizationally not according to differences in intelligence, gifts, or talent but by class and gender.

The 1955 curriculum said that differences in giftedness existed and that the most gifted pupils should be given the opportunity to enrich and accelerate their learning. There was far more detail than before, and it went over the importance of individual supervision, ability grouping, acceleration, and enrichment – as additional courses of varying scope and difficulty. The curriculum emphasized that all subjects should be 'highly individualized' to reflect 'differences in talent' (Undervisningsplan, 1955, pp. 18-19). More 'demanding tasks' were recommended for 'the better pupils' (Undervisningsplan, 1955, pp. 18-19). The needs of those children with mathematical talents were singled out. The talent for math was said to vary significantly between pupils, while there were good opportunities for individualization in the subject. According to the teaching instructions some pupils had 'an excellent aptitude for mathematics' and should be able to pass the course requirements set for the class (Undervisningsplan, 1955, pp. 18-19). About

grading, it said consideration should be given to differences in talent. The highest grade, 'A', should be a very exclusive grade reserved for pupils with a 'striking gift' – who usually made up less than 1 per cent of the 'student material' (Undervisningsplan, 1955, p. 21). When it came to homework, again the teacher should bear talent in mind. The authorities believed that very competent teachers were necessary if all the adaptations were to be successfully implemented (Undervisningsplan, 1955).

The aptitude-focused curriculum of 1955 can only be understood in a longer historical context. Around 1900, questions of talent and intelligence were increasingly discussed in Sweden and elsewhere. Axelsson (2006, 2007) has shown this was primarily under the influence of the scientific community. People wondered what consideration should be given to talent when pupils were divided into classes. Society's changing view on giftedness was evident in the 1919 curriculum, which marked the beginning of a paradigm shift in opportunities for gifted but poor children.

Criticism of the segregated school system by the political left continued to grow after 1919 and the introduction of political democracy in the early 1920s. Sweden was however to be democratized, not only politically, but also socially, economically, and culturally, several left-wing and liberal politicians argued, and they demanded that all pupils be given equal educational opportunities. The talents of the working class should thus benefit from the same advantages as the middle and upper classes. A joint elementary school for all children was seen as the answer. There, all talents, regardless of class, would be educated together. In this new democratic school, every child could learn according to their needs, interests, and talents, and pupils would not be shaped in the same way – far from it (Undervisningsplan 1919, 1955; Axelsson, 2006, 2007; Richardson 2006, 2010; Larsson & Westberg, 2019).

In addition to the political discussion, advances in educational and psychological research between 1920 and 1955 should be remembered if we are to understand the focus on giftedness and intelligence in schools during this particular period. The research grew exponentially after the First World War; academic aptitude was considered innate and intelligence tests became popular. The notion that the population's intelligence was distributed according to a standard curve caught on among politicians, teachers, and researchers. In many countries so-called talented classes were introduced – in Sweden there were attempts made in the late 1920s. According to school experts, researchers, teachers, politicians and others, differences in intellectual ability between pupils made it difficult, if not impossible, to teach all children in the same class. So, the discussion revolved around how the division should be organized and how talented working-class children were to be given the same opportunities as children from other social classes (Axelsson 2006, 2007). Several Parliamentary motions addressed the issue. At the same time, secondary school was considered by the majority of politicians to be the right place for gifted pupils. Many Social Democrats argued,

rather of dismantling the primary school as an institution, that talented working-class children should be sent to secondary school by using more secondary school scholarships for poor but gifted children (Lundgren 2002; Lindensjö & Lundgren, 2018). From the 1920s to 1940s, the party remained divided between those who wanted to abolish the existing, divided school for a joint lower school and those who wanted to broaden secondary school recruitment. The influential social-democrat politicians Alva and Gunnar Myrdal presented their views on the issue in 1941, which although they had little immediate impact, eventually became ruling the Social Democratic Party line. They believed pupils should not be divided, but that individualization should instead be made possible within the framework of a cohesive school class in a new democratic school. They pushed for the abolition of secondary schools and private schools. Instead of an early organizational division, they recommended pedagogical differentiation in a future unified school. That would also suit the gifted children, it was argued. It should though be remembered that there still were many Social Democratic politicians who did not question organizational differentiation after intelligence, achievement, or giftedness (Lundgren, 2002; Lindensjö & Lundgren, 2018).

From the 1920s until the introduction of compulsory school in 1962, several Swedish Government Official Reports (SOU) also raised the question of how gifted pupils' needs should be met. The one published in 1926 discussed whether some pupils might finish school more quickly and proposed two ways of doing so, either by moving up a year or two or by having differentiated courses. In the latter case, if the politicians chose that route, some suggested that a special educational path would be created for gifted pupils. The report pointed out a specific problem with that solution, however, claiming that regardless giftedness, all pupils might need an education of a certain length for reasons of maturity (SOU 1926:5).

In 1940, a new school commission was appointed, and it too addressed organizational divisions by giftedness. Four professors of pedagogy and educational psychology were asked the age when such a division would be appropriate. Three said at the age of 11 it was possible to see the differences in pupils' giftedness and intelligence with some certainty, and they argued for organizational differentiation at that age; the fourth expert said it should come later (SOU 1943:19; Lundgren, 2002; Lindensjö & Lundgren, 2018). After the Second World War, the discussion continued, and yet another governmental commission was appointed in 1946 (SOU 1948:27). The key issues in their reasoning about giftedness would later inform the curricula of 1955 and (above all) 1962, as will be seen.

1962–1994: Giftedness and Equality

In 1962, after many decades of debate, Parliament decided on the introduction of the compulsory nine-year comprehensive school or *grundskola* (lit. basic school).

Under the new system, children were to receive education with equal opportunities regardless of their background. Compulsory school would give every pupil whose grades were good enough the opportunity to continue on to higher education. The segregated parallel school system was finally abolished. Also, in 1962, a new Education Act and curriculum were introduced. That curriculum was replaced only a few years later in 1969, which in turn was replaced in 1980. Each of the three had its approach to giftedness.

In the 1962 and 1969 curricula, the state took aspects of giftedness and differentiation into much account. To begin with the 1962 curriculum, there was a recurring demand that there should be adaptation according to each child's individuality and needs, with pupils described as a 'heterogeneous group of individuals, subject to constant development and representing the most diverse personalities and gifted types' (Lgr 62, p.13). Furthermore, it stressed that 'tomorrow's society' would require greater cooperation between people of different gifts. Children, it was claimed, belonged to different talent types and school should not strive to shape them uniformly. High demands were placed on school on pedagogically differentiated teaching, and school was prohibited from planning activities according to imagined average levels – that was considered negative for all pupils, including the gifted (Lgr 62). Adaptation according to giftedness was thus required, and teachers, it said, should know their pupils' 'intellectual prerequisites' (Lgr 62, p. 32). Enrichment, in the form of deepening and widening the pupils' knowledge and skills, and acceleration were other measures that were advocated in the curriculum. Special courses, extra exercises, diagnostic materials, and ability grouping were also highlighted, and the curriculum said it was wise to put pupils into different study groups. Level-graded courses, named general and special, were started in English and Mathematics. A theoretical line, intended for theoretically gifted pupils, was created in Year 9, with eight other lines to select for the majority of pupils (Lgr 62). In upper school, the curriculum thus solved the issue of pupils' different giftedness by applying organizational differentiation to some extent. In lower and middle school, pedagogical adaptation within the class dominated.

In the 1969 curriculum, pupils were again spoken of in terms of intelligent and talented types. The importance of differentiated teaching returned in this curriculum. The curriculum demanded that all pupils be given the opportunity to develop according to their gifts, needs and intelligence. However, differentiation was primarily to occur within the framework of the class. The methods advocated were mainly the same as in the 1962 curriculum. In addition to enrichment and acceleration, the 1969 curriculum also allowed for organizational differentiation, but it was toned down compared to its predecessor. The choice between practical and theoretical lines in Year 9 was also gone. Contents-wise, the curriculum was divided into basic and advanced courses, and pupils would be able to study both different content and at different speeds (Lgr 69). According to Lindensjö and Lundgren (2018), this meant that ability grouping lived on in practice.

In 1980, another new curriculum was issued for the compulsory school. Like the two previous ones, the importance of differentiated teaching was again emphasized. In addition to the main course, it demanded that pupils had to a significant extent be given the opportunity to make their own subject choices. But the curriculum distanced itself more sharply than the 1969 curriculum from permanent organizational differentiation, since the state feared the long-term effects of it. Organizational differentiation could, however, be achieved by having more flexible group divisions, and pupils could also choose between some courses. Anyway, it was mainly pedagogical differentiation that was advocated. Content and working methods were to be individualized within the cohesive school class, and the usual methods of acceleration and enrichment – according to each pupil's needs, gifts, and interests – were advocated (Lgr 80). Thus, talent, achievement, and individualization is terms that characterized also this curriculum.

How best to understand the emphasis on giftedness and differentiation we encounter in the compulsory school three first governing documents? In Sweden in the 1940s–1960s, science and Government Official Reports had carefully dissected the issues of giftedness, and extensive, internationally cutting-edge research on school differentiation had been produced. The school reforms of the 1960s relied heavily on this research. (Dahllöf, 1967; Lindensjö & Lundgren, 2018). The school commission, which had submitted its report in 1948, proposed abolishing the parallel school system and introducing a nine-year unitary school with a differentiated final year. There are discussions of giftedness in the report, and suitable alternatives are proposed for both practically and theoretically gifted children. The commission concluded that the latter's needs could be met through individualized teaching, various options, and an organizationally divided Year 9. The commission was emphatic that pupils should not be forced in the same mould, and as modern Swedish society required specialists, schools should ensure each pupil received the education suitable for them. Pupils' personalities would guide how the school worked, and individualized teaching was considered necessary for 'pronounced academic talents' (SOU 1948:27, p. 113). We encounter much of what later featured in the 1955, 1962 and 1969 curricula, in the commissions' findings, which thus had a significant impact on the legal framework for Swedish schools for a considerable period.

Even though the parliamentary parties were not in full agreement, a decision had been taken in 1950 to democratize the school system. One stated reason was that it still existed a sizeable 'reserve of talent' who due to socioeconomic or geographical obstacles did not have the same opportunities as others. The parliamentary majority intended to remedy this (Hadenius, 1990; Axelsson, 2006, 2007). First, though, the new school system was to be trialed before a final decision about compulsory school could be taken. As was usual in Sweden, the trial would be followed by a commission. Like the previous commissions, it too asked the scientific experts what age 'general giftedness and special giftedness could be distinguished' (Lindensjö & Lundgren, 2018, p. 54). The experts said giftedness

differed and could alter. One key question for the politicians was whether the new compulsory school should organizationally divide children by giftedness or whether gifted pupils should be taught in heterogeneous classes. The Social Democrats, supported by the Centre Party and the Communist Party of Sweden, advocated limited organizational differentiation and, instead, a high degree of educational differentiation. The Liberals wanted to see an organizational division after six years, while the Conservatives wanted to keep the parallel school system, at least in some form (Lundgren, 2002; Lindensjö & Lundgren, 2018). The three parties of the left and centre won the vote. The minister of education advocated acceleration as a method, saying that 'the most gifted would be allowed to study faster and be able to skip a year' (Hadenius, 1990, p. 175).

Sweden's 1962 compulsory school was a compromise between the organizational differentiation and pedagogical differentiation camps. Lindensjö and Lundgren (2018) believe those who wanted an organizationally cohesive school won the debate, but that those who advocated pedagogical differentiation on a school-by-school basis instead won on the issue of content. The opportunities for the gifted for acceleration and enrichment, but also for ability grouping and line choice, were examples of that. Politicians also believed that the theoretically oriented line in Year 9 of compulsory school would be used only by 'a limited elite' (Richardson, 2010, p. 111). In full, this gives us a good understanding of why giftedness was given careful consideration when the compulsory school was organizationally and pedagogically designed.

The 1969 curriculum removed the choices in Year 9 since almost everyone – eight out of ten pupils – was choosing the theoretical line. Organizational and financial reasons thus lay behind the decision to remove the optional final school year. For gifted pupils, acceleration and enrichment continued to be advocated as methods. There was almost a consensus among Swedish researchers that there were good opportunities to adapt and individualize pupils' education in heterogeneous schools, and it was believed that new teaching material would make this adaption possible (Hadenius, 1990; Almqvist, 2006; Lindensjö & Lundgren, 2018). Both the 1962 and the 1969 curricula, contrary to what has been claimed, thus took full account of the needs of gifted pupils.

The changes from the 1962 and 1969 curricula on the one hand and the 1980 curriculum on the other, warrant consideration from a couple of further perspectives. First, the 1980 curriculum was thinner and less detailed than the earlier ones. This was because the state no longer wished to control learning in school to the same extent as before. Decentralization was in fashion, and the strong, extensive state apparatus was increasingly under criticism in Sweden as elsewhere (Johansson, 2006; Börjesson, 2016; Lindensjö & Lundgren, 2018). Second, the year after the 1969 curriculum was accepted, a new school commission began work. The directives from the Department of Education said school should adapt to different talent types but also that organizational divisions should be avoided as far as possible. The commission agreed, adding that permanent ability grouping

should be kept out of compulsory school (Hadenius, 1990; Lindensjö & Lundgren, 2018). The commission also pointed to schools' problems combining equality, heterogeneous classes, and group or individually differentiated teaching. Another commission concluded that, despite the regulations, Sweden's schools still broadly grouped pupils by giftedness and achievement, to the benefit of high-achieving pupils but leaving low achievers at a disadvantage because of how school was organized (Börjesson, 2016). Schools were primarily adapted to the gifted and high achievers, teachers claimed in evaluations in the 1970s. The growth of special classes for low achievers, which pupils were picked out of the classroom to attend, should be understood on that basis. Gifted pupils were thus by no means forgotten in the 1980 curriculum, and they also benefited from the school's pedagogy and organization (Vinterek, 2006).

The first three compulsory school curricula thus stated that pupils were differently gifted and that schools should adapt their activities accordingly. Soon new ideas followed and the Swedish school system would change – for gifted pupils, for the worse.

1994–2022: Giftedness and Growing Inequality

Ideas of how society should be organized were changing by the late 1970s, putting the private good above the public good. The state should retreat and not intervene, as for much of the nineteenth century. This neoliberal approach hit Sweden with full force towards the end of the 1980s, and views on how education and the school system should be organization changed significantly. Privatization and decentralization were the watchwords. Schools were municipalized, and the number of independent non-fee-paying schools grew rapidly (Englund, 1996; Jönsson & Arnman, 1996; Börjesson, 2016). An essential part of the transformation of the Swedish school system in the early 1990s was the drafting of yet another curriculum.

In the period after 1994, three curricula have been used. The 1994 curriculum, in the decentralized spirit of the time, was very concise – and very vague. It almost included nothing about giftedness or organizational and pedagogical differentiation for the gifted. However, as in earlier curricula – though without the nuances of those – it mentioned that pupils should develop as individual. 'Teaching must be adapted to each pupil's conditions and needs', it was said, and there were 'different ways to reach the goals' (Lpo 94, p. 6). It also mentioned, almost in passing, that intellectual aspects should be considered when planning learning activities. There is a resemblance to earlier curricula, in other words. Where the 1994 curriculum to a great extent differs is in not providing guidelines on how schools were to meet the ambitious goals. Neither does it refer to the organization or methods that schools and teachers can or should use (Lpo 94). The 1994 curriculum is thus very different to the four previous ones, being vague, short, and almost silent on the question of giftedness.

In 2011, another school curriculum was introduced. Under the heading 'An equivalent education', it stated that 'Teaching should be adapted to each pupil's circumstances and needs. It should promote the pupils' further learning and acquisition of knowledge based on pupils' backgrounds, earlier experience, language and knowledge' (Lgr 11, p. 6). This did not mean that teaching should be designed the same way everywhere, it continued, but 'There are also different ways of attaining these goals' and 'Account should be taken of the varying circumstances and needs of pupils' (Lgr 11, p. 6).

The current 2022 curriculum is similar to the preceding curriculum. As before, the teacher must plan and organize learning activities after individual consideration (Lgr 22). However, the Education Act now emphasizes that high-achieving pupils must receive guidance and stimulation to attain more than otherwise possible in their development (Education Act 2010:800: ch. 3 § 2; Act 2022:146).

Overall, the unavoidable conclusion is that intelligence and giftedness have been almost completely lost from the three most recent compulsory school curricula, which are far less nuanced than those especially in the 1960s about the rights of gifted children to learn and develop at school.

Beyond the curricula, gifted pupils have gradually received more attention. As noted in the literature review, after the turn of the century 2000 there has been fresh research on giftedness in school, and the state is now paying greater attention to gifted pupils than it did in the 1990s and 2000s. In 2010, the centre-right coalition government made increased organizational differentiation possible and decided that advanced education should be trialed in the last years of compulsory school. Advanced education in the form of special schools or classes was also designed, using organizational separation to give certain pupils a far deeper or broader knowledge. According to the decision makers, it would provide 'talented pupils with sufficient challenges in the subject or subjects at which the advanced education is directed'. At the same time, test-based admissions to advanced education were allowed (U2010/4818/S).

In 2019, the government tasked the Swedish National Agency for Education with drawing up proposals for 'how schools work with students in the compulsory school who easily meet the knowledge requirements in one or more subjects, can be strengthened and supported' (Skolverket, 2019, p. 1). Part of the remit was to improve opportunities for pupils to be enriched and to accelerate their learning. In its response, the Agency proposed that pupils who 'have prerequisites for this' be able to take upper secondary school courses in compulsory school (Skolverket, 2019, p. 1). With the increased interest in giftedness, the Agency also developed support material for schools about teaching gifted pupils. In the summer of 2022, the government proposed changes to the latest curriculum, because it wanted pupils to be provided with 'better opportunities to read at a higher level and to progress at a faster pace of study'. That proposal specifically targeted gifted and high achievers (U2022/02568).

To understand developments in recent decades a couple of aspects should be highlighted. The first is decentralized government. The early compulsory school curricula were comprehensive and relied on state-of-the-art research. With the ideological shift after 1980, that accelerated in the 1990s, the curricula showed signs of the state having become a reluctant ruler, all the more willing to hand to schools the decisions about what should be done and how it should be organized. Second, it needs to be highlighted that the Swedish school system again has been heavily politicized. Even before the reforms of 1962 there had been visible cracks among the political parties about compulsory school and how it should be organized, but in the 1970s and 1980s those cracks became larger and larger. From the mid-1980s, it also became the Social Democrats' ambition that the freedom to choose schools should be extended, and there was talk of strengthening the user influence. A new heterogeneous school system, with many schools and profiles, was, towards the end of the 1980s, judged to be better suited to meet the individual wishes and needs, and a government commission from 1990 called for private influence in schools to increase. The centre-right government of 1991–94 agreed and launched several school reforms of great significance for the future. The 1994 curriculum was issued at the same time as other large-scale reforms of the school system, including municipalization and independent school reform. With the shift in education policy, the equal compulsory school system began to break down (Börjesson, 2016; Englund, 1996; Jönsson & Arnman, 1996; Lindensjö & Lundgren, 2018; Lundgren, 2002; Richardson, 2010). For school curricula, the shift meant that goal management superseded rule management, so that the curriculum texts that related to giftedness and differentiation became unclear.

Independent school reform should also be addressed. Past demands that parents should have greater freedom to choose schools and that children could be divided after perceived talents and achievements returned in the years around 1990. Some independent schools marketed themselves to attract the ostensibly high-achieving, gifted pupils. It was the middle and upper classes who took the opportunity to choose their children's schools, with the result that the school system is again significantly more segregated than during the 1960s–1980s (Lindensjö & Lundgren, 2018; SOU 2020:28). Parents and researchers have also called for the opportunity for there to be organizational differentiation by giftedness. In response, the state has launched the measures reported above. Special educational paths and special schools for children whose parents believe them to be particularly talented or gifted, have, as Margolin (1993, 1994) and Probolus (2020) show for the US, again been created in Sweden as well.

Discussion and Conclusions

The article shows the enduring interest on the part of the state in giftedness and differentiation in schools. The Swedish primary and compulsory school

system has never foremost been organized with giftedness in mind, but for over a century the curricula have demanded that school activities be adapted to reflect differences in gifts, talents, or intelligence.

Little consideration was given to giftedness in the primary school curricula until 1919. Primary school was a school for the poor, and gifted children from the working class were largely ignored by the state in the days before universal suffrage. However, some adaptations were possible. For example, a high achiever could finish school early if it was agreed they had met the knowledge requirements. In 1919 an important change regarding giftedness was made in the new curriculum. Enrichment, acceleration, and ability grouping were highlighted as appropriate methods for teaching the gifted. Giftedness continued to be a focus in the education debate. In 1955, shortly before the advent of compulsory school, the last primary school curriculum was issued. Aspects of giftedness now received more attention, and the governing document gave gifted pupils greater opportunities for educational enrichment and acceleration. The remarks about giftedness were far more extensive in this curriculum than in the previous ones.

Primary schools were soon to be abolished, though. The introduction of compulsory school in the early 1960s came when the measurement and sorting of pupils by intelligence and achievement had already interested politicians, educators, and the research community for several decades. Several school commissions had also carefully analysed the needs of gifted pupils. The first compulsory school curricula of 1962 and 1969 required schools to consider differences in pupils' giftedness and intelligence. Organizational differentiation was possible, with the 1962 curriculum being more positive than subsequent iterations. Methods such as identification, acceleration, enrichment, ability grouping, and coaching were highlighted. The 1980 curriculum was instead less detailed than its predecessors about giftedness and the question of organizational or pedagogical differentiation, but there were still clear demands for adaptation to individual needs. None of these criteria imposed limits on gifted pupils' opportunities for individual development.

Instead, gifted pupils' opportunities have been curtailed for the past thirty years. In the brief, vague curriculum of 1994, most mentions of intelligence and giftedness were dropped, and it was left to practitioners to decide how to conduct differentiated teaching. The next two curricula, 2011 and 2022, are marginally more explicit about giftedness (even if they confuse high achievers with gifted pupils) but not to the degree seen in the curricula issued in the 1950s and 1960s.

An analysis of the wording of Swedish school curricula shows that the conclusions of several researchers about giftedness in the last decades should be nuanced, and that the question of giftedness in school be put into historical context. If a specific Swedish egalitarian culture did exist, it did not mean gifted children were ignored or that pupils learning were to be uniform. On the contrary, for much of the twentieth century schools focused on talent and differentiated teaching. Gifted children were seen as a resource – something as true in Sweden

as in for example the UK or the US. The introduction of compulsory school brought a considerable improvement in gifted working-class children's opportunities for a good education, to the benefit of themselves and society.

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Historicizing the Determinants of the Catholic Evangelization in Western Part of Kenya, 1902-1978

By Kizito Muchanga Lusambili & Charles Cheneku Simbe**

This study aimed to investigate the determinants of evangelization in the Western part of Kenya from 1902 to 1978. Literature review helped identify gaps, and Emile Durkheim's functionalism theory and Arnold Toynbee's Challenge and Response theory provided the theoretical framework. A historical research design was used to collect, verify, and synthesize evidence from the past. The target population was one million Catholic faithful; with a sample size of 384 Catholic Christians determined using the Krejcie and Morgan Table. Data collection tools included questionnaires, interviews, focus group discussions, observations, and secondary sources. Qualitative analysis was performed on the data. Research ethics were followed for authenticity and objectivity. The study found that evangelization in the Catholic Diocese of Kakamega (CDKK) employed a kerygmatic approach rather than Fr. Arnold Witlox's previous approach. It recommended a revision of the CDKK's history from 1904 onwards. In summary, this study explored evangelization determinants in Western Kenya, using theoretical frameworks and a historical research design. The findings emphasized the shift in the CDKK's approach and suggested a reassessment of its historical reconstruction.

Introduction

To understand the present, historians must dig back into the past to provide information that enables them to reconstruct the current situation. In that way, this study established the continuities and discontinuities in evangelization determinants that enhanced the interrogation of the evangelization in the study area. While using the given theoretical framework (which combines two theories: Functionalism Theory and the Challenge and Response Theory), this study endeavoured to illustrate the various determinants that influenced evangelization in the region. In 1902, the first Catholic Missionaries arrived in Western Kenya, and in 1978 is when the Catholic Diocese of Kakamega was carved from the Catholic Diocese of Kisumu. At that time the Diocese encompassed the entire former Western Province of Kenya (Now Vihiga, Kakamega, Busia and Bungoma counties).

There were a series of events that formed the historical benchmarks in this study. These events included: Opening of mission stations, World War One (1914-1918), the inter-war period (1919-1939), World War Two (1939-1945), the fight for independence (1945-1963), and the Vatican II Council (1962-1965). In the same

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breath, the study unraveled several factors and strategies that influenced the Mill Hill Missionary (MHM) evangelization in Western Kenya. They included: 7 missionary friendship with local leaders, the contribution of Chief Sudi Namachanja, involvement of lay people in evangelization, creation of catechumenates, the charisma of the MHM, the beatification of Uganda Martyrs, and the hatred of the Nabongo Mumias' appointees. The MHM also applied diverse strategies to evangelize this region. This study identified the following strategies: planting the faith through Kerygma, baptisms, catechesis, creating catechumenate, education for literacy, house visitations, and learning of local languages. The Laity, especially in Isuka –Idakho regions were influenced by Fr. Arnold Witlox's style of evangelization as his style embraced the local culture. The Catechists, mostly from Uganda, intensified the creation of the catechumenate classes.

This study was premised on the fact that; evangelization in western Kenya can be understood within the evangelization that took place in the larger East Africa. The study traces the catholic evangelization in the region from 1902 to 1978 by interrogating the specific objective of the study, which was to historicize the determinants of the catholic evangelization in the western part of Kenya from 1902 to 1978. The task was to assess the determinants of Catholic evangelization in Western Kenya before 1978.

Literature Review

To assist in situating and interrogating the lacunae for this study are the following: J. Baur (1994), V. M. Mukokho (2016), D. Muwemba (2014), H. Burgman (1990), Frants Groot (1984), P. Sulumeti (1970), among others. To understand the historicity of evangelization in the area of study, it is important to note that by the 15th century, the Portuguese tried to evangelize East Africa, but they ended up dismally.¹ The same idea is held by J. Baur that no any other European Nation had attempted to introduce catholicism in this region apart from the Portuguese.² The Portuguese efforts to spread Christianity were marred by baptism *en mass* without catechesis, conversions of convenience, gender insensitivity whereby they ignored women, and above all they lacked necessary evangelization tactics. Furthermore, they were not good models; in fact their attitudes and emotions towards the people at the East Coast of Africa were inhibitive to effective

1. D. Muwemba, *Op. Cit.*, p. 39; P. Sulumeti, (1970), Church Missionary in Kenya in the Light of Vatican II council, PhD dissertation in Canon Law in Pontificium Universitas Urbaniana, (Unpublished Thesis), Rome, p.112.

2. J. Baur, (1994), *2000 Years of Christianity in Africa: An African Church History*. 2nd Ed., Nairobi: Paulines Publications Africa Ltd., p.76.

evangelization.³ In addition, their evangelization was with little success because the Portuguese failed to make the people at the Coast imitate them and accept Christianity. This was compounded by their destruction of the thriving Indian Ocean trade that made the locals to hate them. D. Muwemba retorts that, the Portuguese had no idea that the Muslims would later reverse their penetration by destroying houses of worship. Even those local people who were previously converted to Christianity were forcibly returned to the Islamic faith.⁴ The Muslims challenged them, and the '*ius patronatus*'⁵ system did not work in their favour; their evangelization was instead hotchpotch, and, therefore, the Portuguese failed to evangelize East Africa.⁶ Their lives and atrocities also failed to convert people to Christianity. The Portuguese caused many conflicts on the Kenyan Coast, making Christianity a disgrace.⁷ Notwithstanding their missionary failure, the Portuguese were the first to introduce the idea of Christianity along the East African Coas.⁸ The modernization theory explains that Europeans came to Africa to civilize, improve, and teach Christianity.⁹ The historical evidence to illustrate the Portuguese presence includes the Vasco da Gama pillar in Malindi, Fort Jesus in Mombasa, The Mombasa Martyrs, and the Indian Ocean trade that made the Portuguese come over and control of the East Coast of Africa. The putting up of Fort Jesus was a response to the challenge of Islamic attack. Thus, the Portuguese used Fort Jesus as a hiding place.¹⁰ Literature on the Portuguese is significant to this study because their failure to evangelize became a lesson to the missionaries who came after them. The way the MHM, Consolata, Augustinians and White Fathers strategized their evangelization strategies was an apparent lessons learned.

According to Hans Burgman, Catholicism was strongly felt in Kenya on the arrival of the Holy Ghost Fathers and the Mill Hill Fathers in the late 1880s, and

3. A. Bandura (1965), "Influence of Models' Reinforcement Contingencies on the Acquisition of imitative Responses." *Journal of Personality and Social Psychology*, 1 (6), pp. 589-602. pp. 589-602.

4. D. Muwemba, (2014), *A Short African Church History*. Kampala: Angel Agencies Ltd., p.16

5. The right of patronage in Roman Catholic Canon law is set of rights and obligations of someone, known as the patron in connection with a gift of land (benefice). It is a grant made by the church out gratitude towards a benefactor.

6. cf. A. Z. Mash, & W. G. Kingsnorth, (1965). *An Introduction to the History of East Africa*, 3rd ed., Cambridge, Cambridge University Press, p. 14.

7. Ibid, p.18.

8. Mwaura, Philomena Njeri. "African instituted churches in East Africa." *Studies in World Christianity* 10, no. 2 (2004): 160-184.

9. Lee, Robert D. *Religion and politics in the Middle East: Identity, ideology, institutions, and attitudes*. Routledge, 2018

10. Headrick, Daniel R. *Power over peoples: Technology, environments, and Western imperialism, 1400 to the present*. Vol. 31. Princeton University Press, 2012.

later the Consolata Missionaries.¹¹ In the same pipeline Philip Sulumeti states that, the Holy Ghost missionary institute was the first to be entrusted with 'ius commissionis'¹² empowering them by the Holy See to evangelize Eastern Africa.¹³ Baur holds the same view in his study of the history of Christianity in Africa.¹⁴ He further notes that in 1883, the Prefecture of Zanzibar was raised to the status of a Vicariate Apostolic. The western boundary of the Vicariate of Zanzibar was then drawn. These regions were confided to the care of the White Fathers in the Vicariate of Nyanza and the Vicariate of Tanganyika. The two vicariates embraced Uganda and central Tanganyika. Cardinal Lavigerie, the founder of the Missionary Society of White Fathers in 1868, had sent his missionaries to work in the Buganda kingdom and Central Tanganyika. The presence of the White Fathers in Uganda eventually affected and influenced the evangelization of Western Kenya.¹⁵ This is because, before 1902, the Western part of Kenya from Naivasha belonged to Uganda.¹⁶ According to B. A. Ogot, the boundaries of Kenya were transferred from Naivasha to Malaba as more fertile lands were discovered to the west of Nairobi. This was because the land in this region was fertile and thus suitable for sustainable white settlement as Sir Charles Eliot (the Governor of Kenya, 1900-1904) had envisioned.¹⁷

Baur underscore that the catholic evangelisation of inland Kenya was shared among the missionary societies; the Holy Ghost Fathers (HGF) advanced from the Coast towards the Ukambani and Kikuyu land, the Mill Hill Missionaries expanded from Uganda into Kenya, and the Consolata Fathers settled around Mount Kenya.¹⁸ In Mumias Town, the first evangelizing mission in the CDKK was formally launched on October 26, 1903. From 1888 to 1949, Mumias operated as a caravan route, the Wanga Kingdom's administrative center, and Nabongo Mumia's home. Mumias was more pleasant for the early missionaries since Baganda Catholics already lived and worked there and welcomed them.¹⁹ From Mumias and Mukumu, Catholicism spread to other parts of Buluyia: Kibabii, Nangina, Butula, Butsotso, Idakho, Maragoli, Kabras, Marama, Kisa and later on in Lugari region. According to Baur,²⁰ early Catholic missionaries had new evangelisation

11. H. Burgman, (1990), *The way the Catholic Church Started in Western Kenya*, London: Missions Book Service Ltd., p. 30.

12. Given responsibility to evangelize the people

13. Philip Sulumeti, (1970), *Op. Cit.*, p. 114.

14. J. Baur, (1994). *Op. Cit.*, p. 72.

15. Kollman, Paul, and Cynthia Toms Smedley. *Understanding World Christianity: Eastern Africa*. Fortress Press, 2018.

16. J. Baur (1994), pp. 123-124.

17. B. A. Ogot, (1974). *Kenya Under the British Rule 1895-1963. Zamani: A Survey of East African History*. Nairobi, KE: East African Publishing House, pp. 255-289.

18. J. Baur, (1994). *Op. Cit.*, p. 76.

19. *Ibid*, p. 62.

20. J. Baur, (1994). *Op. Cit.*, p. 23.

methods ranging from setting up schools and hospitals and, later on, economic development. They were more concerned with creating a small elite group of convinced believers. The missionaries passed from one village to another, erecting a school or a prayer house and entrusted it to catechists. They picked up regional tongues to make evangelizing simpler. When hunger periodically plagued Mumias, Fr. Nicholas Stam (later to become Bishop) supplied grain, which led to the conversion of a large number of people. It is important to understand from the previous part that the Mill Hill Catholic Missionaries traveled from Kampala through Kisumu, Mumias, and finally Kakamega before arriving in Kenya (Mukumu). Their efforts in evangelisation, catechesis, and sacramental life affected and united the populace. The development of hospitals and schools helped to maintain the community's overall social order. Such structures, in Durkheim's opinion, aid in evangelisation because they served as gathering points for people, which allowed missionaries to instruct them in the faith.

Although Uganda is not in the scope of this study, its mention is for the good of understanding evangelization in Western Kenya. The events in Uganda prompted the coming of the Mill-Hill Fathers, who later received the mandate to evangelize Western Kenya. Philip Sulumeti posits that Protestantism, Islamism, and Catholicism reached Western Kenya from Uganda.²¹ Western Kenya was Christianized and Islamized from Uganda because, in their imperialistic motives, the Arabs and the Europeans targeted the King and his Kingdom, the centre of power by then. They believed that the entire Kingdom or area would be converted once the King was converted to their Religion, because he could easily convince the subjects to be converted.²² Since Western Kenya fell under Uganda and the dominating Kingdom in the area was Buganda, the Europeans and Arabs strived to reach Buganda to convert the Kabaka, whom they believed would subsequently influence the subjects to convert to Christianity or Islam.²³ Before the arrival of Christians in Uganda, the Muslims were already settled. Kabaka Suna had welcomed them into his Kingdom in the early 1840s.²⁴ The presence of these Muslims later had negative impacts on the evangelisation process in Buganda and later on in Mumias-Kenya.

Hans Burgman spent twelve years conducting research in both Kenya and other countries for his book, *The Way the Catholic Church Started in Western Kenya*.

21. Philip Sulumeti, (1970). *Op. Cit.*, pp. 123-124.

22. Mazrui, Ali A. "Ethnic tensions and political stratification in Uganda." In *Ethnicity in Modern Africa*, pp. 47-68. Routledge, 2019.

23. Ward, Kevin. "A history of Christianity in Uganda." *From mission to church: A handbook of christianity in East Africa* (1991): 81-112. Low, Donald Anthony. *Buganda in modern history*. Univ of California Press, 1971.

24. Brierley, Jean, and Thomas Spear. "Mutesa, the missionaries, and Christian conversion in Buganda." *The International journal of African historical studies* 21, no. 4 (1988): 601-618. Sperling, David, and Jose Kagabo. "The coastal hinterland and interior of East Africa." Ohio University press, 2015.

The book covers the time span from the arrival of the Mill Hill Missionaries (MHM) from Uganda at the turn of the century to the establishment of the first mission stations in Kisumu (1902), Mumias (1904), and Mukumu (1906), as well as the time after the Second World War (1939-1945) when the local Church could be said to have taken root.²⁵ The book offers a comprehensive analysis of Western Kenya's early Catholic missionary efforts.²⁶ Burgman provides a vivid account of the early struggles faced by the first missionaries, the circumstances in which they traveled and lived, as well as a glimpse into the personalities of those involved and the political climate of the time. He also discusses how the locals responded to the evangelisation. The Bishop emeritus of Kakamega, Philip Sulumeti, refers to the MHM as "Our Fathers in Faith" and urged readers to honor, respect, love, and cherish them.²⁷ Burgman's work is quite content-rich, particularly before 1978. The second benefit was that Burgman's work laid the groundwork for comprehending the Kakamega people, their customs, early difficulties, and opportunities that facilitated conversion.²⁸ Third, up to this point, this is the only major work (primary text) that provides an accurate chronology of historical occurrences from 1895 to 1977, prior to the establishment of the Diocese. Burgman praises the Vatican II Council (1962–1965) for reestablishing the Church's connection to modernity after she had lost it in the 20th century.²⁹ Fifth, Burgman's book's methodological component was primarily helpful to the investigation. The information was written rationally and chronologically. Impressive is the careful blending of materials, particularly the utilization of secondary, primary, and archival sources from Kenya, Uganda, and England. Burgman's outstanding command of the languages, including English, Kiswahili, Latin, Luyia, Dholuo, Ateso, Dhoadhola, Lumasaba, Lusoga, and Luganda, allows him to articulate his thoughts on the Mill Hill Fathers and the evangelizing of the area well. The current study borrowed much of these methodological approaches. Burgman averred that when Philip Sulumeti assumed the throne of Kisumu on March 19, 1977, it was evident that a new era had begun.³⁰ This explains why the present study covers the period between 1902 and 1978, with the erection of the Catholic Diocese of Kakamega and Bishop Philip Sulumeti as the first Bishop.

In his PhD dissertation, Philip Sulumeti made an effort to demonstrate the establishment of a local church in Kenya. The dissertation is based on the reforms made by Vatican Council II, which took place between 1962 and 1965. This council is undoubtedly one of the most important milestones in the current research on the historicization of the evangelizations determinants of western Kenya.

25. Ibid, p. 25.

26. H. Burgman, (1990). *Op. Cit.*, p. 23.

27. Ibid, p. 3.

28. Ibid, p. 3.

29. Ibid, p. 305.

30. Ibid, p. 285.

The first two chapters of the dissertation focused primarily on the theological and legal foundations of church missionary effort. Sulumeti's dissertation emphasizes that the evangelisation for each area was carried out by a specific missionary institute entrusted by the Holy See. Sulumeti brings out clearly the role of the Church as an instrument in continuing the mission of her founder, Jesus Christ, to humankind at two levels: Mission "*Ad intra*" and Mission "*Ad extra*." Sulumeti tries to illustrate the change to the sacred hierarchy in mission territory in chapter two. He details the development of the Kenyan Catholic Dioceses. At the same time, he makes an effort to describe the various evangelizing tactics and strategies used by Catholic missionaries to evangelize Kenya throughout the colonial era. This study has revisited these strategies and how the affected catholic evangelization in western Kenya.

Sulumeti's dissertation provides significant contributions to the current research on historicizing the determinants of evangelization in the development of Western Kenya. In chapter three, Sulumeti highlights that the evangelization of Kenya was entrusted to the Congregation of the Holy Ghost Fathers, the Society of the Mill Hill Fathers, and the Society of the Consolata Fathers. Chapter four emphasizes the establishment of the sacred hierarchy in 1953, which marked the beginnings of the local Church in Kenya. This dissertation proves beneficial for the present study in multiple ways. Firstly, it offers comprehensive insights into the development of Catholicism in Kakamega, Kenya, and the broader East African region. Secondly, it explores the evangelizing tactics and strategies employed by missionaries, along with the history of the Diocese of Kisumu, which led to the formation of the Diocese of Kakamega. Furthermore, Sulumeti's research draws attention to the marginalization of the laity in the Church's apostolate, prompting the current study to examine the role played by the laity in the evangelization process within the diocese. Additionally, the dissertation discusses the concepts of inculturation, adaptability, and indigenization within the local Church in Kenya, addressing prejudices and barriers in these areas. This investigation fills a gap, particularly regarding the role of inculturation in the evangelization efforts of the Diocese. Lastly, Sulumeti's work stands out due to the incorporation of diverse sources, including scriptures, Church and secular history, ecclesiology, papal writings, patrology, canon law, as well as archival and secondary sources. This rich collection of materials makes Sulumeti's dissertation a valuable resource for reconstructing the history of evangelism and understanding the evolving trends and changes in the growth of the Catholic Diocese of Kakamega.

However, the study does have some limitations. Firstly, the author neglected to translate the extensive use of Latin and Italian terminologies, making it challenging for readers without a background in these languages to fully understand the dissertation. While there were only a few Latin statements in the study, they were translated for the reader's convenience. Secondly, the research does not mention the utilization of oral sources. Considering that there are

individuals within the Catholic Church who possess knowledge on the subject, the researcher did not explain the reason for not consulting oral sources.

Frans Groot explored the life and missionary activities of Nicholas Stam, one of the Great Mill Hillers and a well-respected Apostle of Western Kenya, in his book *Stam of Mumias; The Hagiography*. The author shows how Fr. Nicholas Stam became a successful missionary in Kenya by a combination of his skills and values, including zeal, love, sincerity, dreaming, endurance, perseverance, painting and drawing, building, and language proficiency.³¹ Six chapters make up the two hundred and forty-five page book. The author provides in-depth information on Nicholas Stam's formative years, the realities of missionary life, challenges and opportunities in Stam's evangelisation mission, how he came to recognize Western Kenya as a fertile field for the Lord of the harvest, how he rose to become the Bishop of the Vicariate of Kisumu (Western Kenya), and how he ultimately passed away on Ascension Day, May 26, 1949, at St. John's Hospital in Holland. The author used a historical approach, placing Stam's life's events in chronological sequence; this approach has been used in the current study.

Even though the book is *hagiographical*, it is a source that provides a wealth of historical information on how the Mill Hill Missionaries arrived in Western Kenya, strategies applied by Nicolas Stam and other MHM to evangelize western Kenya, the challenges and opportunities in Stam's evangelizing mission, initial steps towards inculturation as evidenced in Stam's evangelisation road map, planting of the faith in Western Kenya and most importantly, the resuscitation of Mumias Catholic Mission, the primacy of the catechumenate approach to evangelisation and how Stam worked in collaboration with the local leaders.

Furthermore, Frans Groot's book is also essential to the present study because of the sources he consulted to obtain data. The author relied on Nicolas Stam's letters, diaries, memories, and stories that have been preserved in the Mill Hill archives, the Work of Hans Burgman titled "*The Way the Catholic Church Started in Western Kenya*," oral and written traditions of the Mill Hill Missionaries.³² These sources are important and relevant to the current study. Therefore, the book helps the current study identify and access the relevant sources for reconstructing the history of evangelisation in CDKK.

Groot's work acknowledges the challenges and opportunities encountered by the MHM in their evangelization efforts, including language barriers, dangerous wildlife, illnesses, difficult terrain, hostility from local figures, cultural differences, transportation limitations, and the complexities of Islamic law and traditional religions. Building on these insights, the current study seeks to explore the determinants of evangelization in western Kenya from 1902 to 1978 by focusing on the opportunities that arose. However, a notable flaw in Groot's work is the absence of a comprehensive list of sources, a bibliography, or the identification of

31. Frans Groot, (1984). *Stam of Mumias; The Hagiography*, S&C, Lee Foundation, p. 9.

32. *Ibid*, p. 10.

witnesses for oral history. To address this, the present study on the paradigm shift in the historical growth of the CDKK has made a deliberate effort to provide an extensive list of references, maps, and testimonies, ensuring transparency and eliminating any doubts about the sources used. Moreover, while Groot's work emphasizes religious aspects, there are concerns regarding its depth and breadth. In contrast, the current study offers a more comprehensive and in-depth analysis of religious features, events, and the individuals involved. While employing historical methods, this research provides a thorough exploration of the religious aspects related to the development of the CDKK. In summary, Groot's work highlights challenges and opportunities in MHM's evangelization, and the current study builds upon these findings to examine the determinants of evangelization in western Kenya. The study addresses the shortcomings of Groot's work by providing comprehensive references and testimonies. Additionally, it offers a more comprehensive analysis of religious aspects compared to the narrower focus of Groot's work. It was observed that, Groot has not hinted at the negative character of Stam, who has been described as somewhat 'crude' by some of his colleagues as reported by Burgman.³³

Methodology

According to Babbie and Morton, research methodology focuses on the precise tasks and methods that are performed and used during research.³⁴ The study employed a historical research design, which is essentially descriptive.³⁵ Strydom, Fouche, and Delpont³⁶ define a research design as a specification of the adequate operations to be performed to test a specific hypothesis under a given condition. The primary purpose is to give a complete account of participants' reports and observations in response to the guiding research question. This study was carried out in the Catholic Diocese of Kakamega, which was established on 27th February 1978.³⁷ The Diocese has 44 parishes (see Table 1.2) distributed in two counties of Vihiga and Kakamega, which are further divided into five Deaneries.

33. Ibid, p.80.

34. E. Babbie and J. Mouton, (2002). *The Practice of Social Research*, Cape Town: Oxford University Press: p. 72.

35. P. G. Okoth (2012). "Research as a Cornerstone of quality Assurance in University Education with Specific Reference to Uganda Martyrs University." *Journal of Science and Sustainable Development*, Vol. 5, pp. 37-55.

36. H. Strydom, C. Fouche and B. C. Delpont, (2002). *Research at Grassroots Level*, Pretoria: Van Schaik, p. 137.

37. H. Burgman, (1990). *Op. Cit.*, p. 238. & P. Sulumeti Key Informant Interview, at his Residence Bishop Emeritus house-Kakamega on 28th March, 4th June, 12th August 2021.

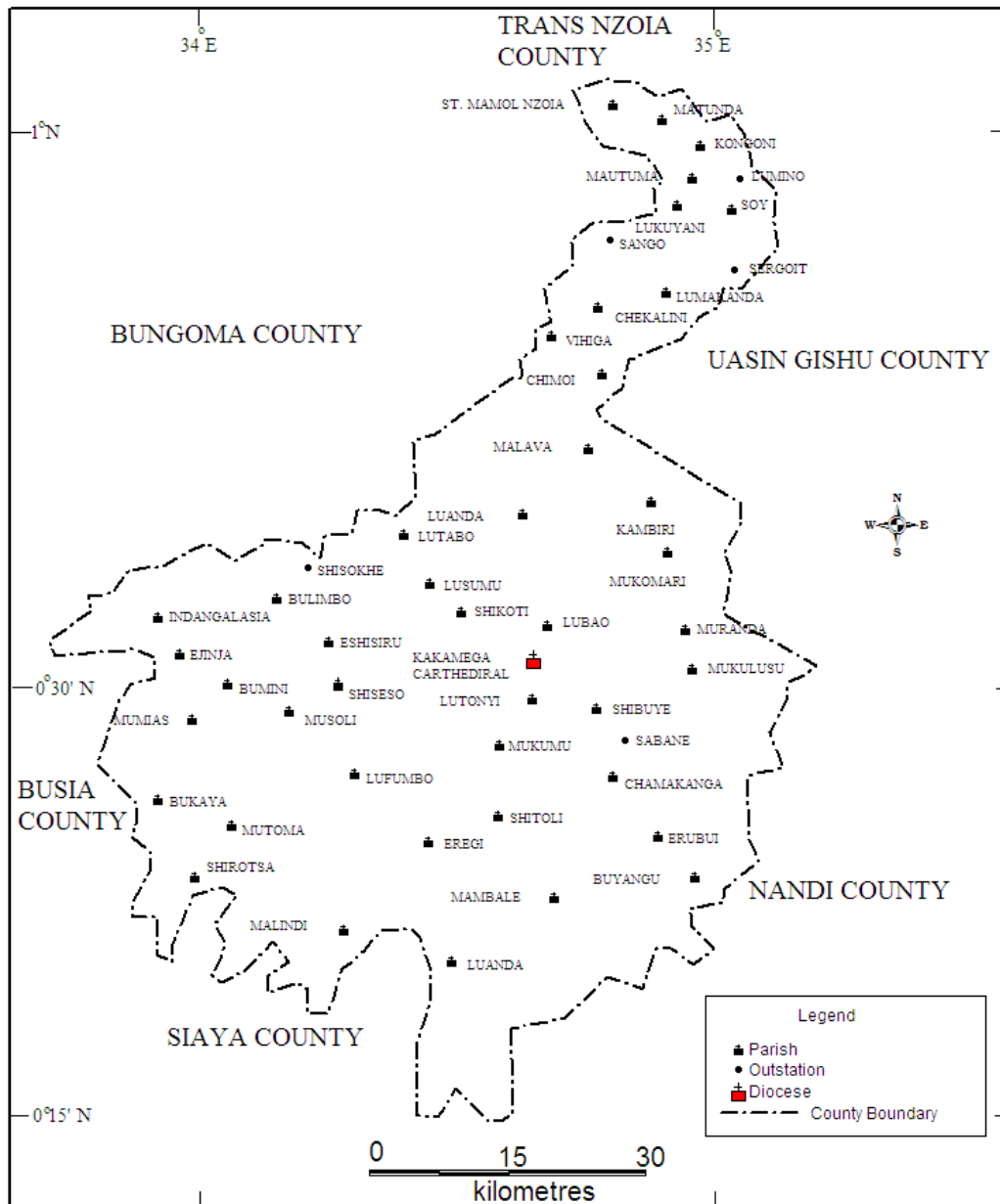


Figure 1. Map Showing Diocese of Kakamega and its Parishes

Source: Moi University Geography Department GIS Laboratory.

Robert V. Krejcie and Daryle W. Morgan provide a table that helped the researcher reach a sample of 384. According to the table, when the target population is over 1,000,000, Robert V. Krejcie and Daryle W. Morgan say that the sample size is 384.³⁸ The data was collected through questionnaires, interview schedules, Focus Group Discussions, observations, and archival and secondary

38. R. V. Krejcie & D. W. Morgan, (1970). Determining Sample Size for Research Activities. *Educational and Psychological Measurement*, 30 (3), pp. 607-610.

material, which provided important information on evangelization paradigm shift. The research instruments were validated in terms of content and face validity.³⁹ Thus study relied on the qualitative method to collect and analyze data, where the experiences, perspectives, and thoughts of participants regarding the evangelization process in the Catholic Diocese of Kakamega were taken into consideration. During this study, the following ethical issues were observed: informed consent, right to anonymity, beneficence, and respect for participants. Two areas were significant to situate the place of ethical considerations in this study. These are: general ethical considerations and the researchers' "positionality" in this study.⁴⁰

Discussion and Findings

This study identified a number of determinants for evangelisation in western Kenya from 1902-1978. Kerygmatic or proclamation of the good news featured prominently in the study.⁴¹ Kerygmatic approach was purely the apostles' strategy of evangelizing the people in the early Church. The missionaries used the Kerygmatic approach for evangelization and converted many people to Catholicism. According to Bonaventure Luchidio, the Kerygmatic strategy dominated missionary evangelization in Africa right from the onset.⁴² The Good News of the gospel formed the content of Kerygma.⁴³ Through this strategy, the Church was planted in Buluyia by the MHM, resulting in the establishment of several missions and related institutions from 1907 to 1978.⁴⁴ Moreover, the FGD of the Catechists informed this study that, the preaching of the missionaries, accompanied by word

39. H. H. M. Uys, & A. A. Basson, (2000). *Research Methodology*, Cape Town: Kegiso Tertiary, p. 80.

40. A. L. A. Lusambili, B. Sadig & K. Muchanga, (2020). Positionality Access to the Social and Place of Research: *Narratives from Research in Low Resource Settings in People, Place and Policy* 14/1. pp. 35-54.

41. Tutu, Osei-Acheampong Desmond, and Robert Osei-Bonsu. "Kerygma and History in the Theology of Rudolf Karl Bultmann: A Biblical-Theological Study." *Religion* 24 (2008): 171-81. Westby, Eric J. "Renewing the Kerygmatic Moment: The Centrality of the Kerygma in the 2020 Directory for Catechesis and the Implications for Forming Clergy and Parish Staffs." *International Journal of Evangelization and Catechetics* 3, no. 2 (2022): 135-147.

42. Bonaventure Luchidio, Key Informant Interview, at Kitisuru Woods -Nairobi, on 30th October, 2021.

43. Croatto, J. Severino. "Jesus, prophet like Elijah, and prophet-teacher like Moses in Luke-Acts." *Journal of Biblical Literature* 124, no. 3 (2005): 451-465. Betz, Otto. "The Kerygma of Luke." *Interpretation* 22, no. 2 (1968): 131-146. Rissi, Mathias. "The kerygma of the Revelation to John." *Interpretation* 22, no. 1 (1968): 3-17.

44. M. S. Sikolia, (1993). *Factors of Development in the Catholic Church in Kakamega: from Father Agt to Bishop Sulumeti (1907-1992)*. (Unpublished Doctoral dissertation, University of Nairobi).

and deeds (testimony), attracted the people to the faith.⁴⁵ The same idea was held by Ogutu.⁴⁶ Frans Groot writes that a priest was a combination of a preacher, a protector, a provider, a teacher, and nearly everything to the people he served.⁴⁷ The respondents' averred that witnessing by the Mill Hill Missionaries was a major factor in evangelizing western Kenya. One of the informants, Petro Lubulela, said that many Mill Hill Missionaries were good shepherds: they loved the flock, sacrificed for the flock, and remained available to the flock.⁴⁸ Their faith and morals impacted the people, hence leading to numerous conversions. Once Fr. Nicholas Stam said, as a missionary he did not live his own life but lived for other many people under his custodianship.⁴⁹ Their exemplary lives attracted many indigenous people to the faith.

Notwithstanding the many different dialects (tower of Babel) in Buluyia that could have been a barrier to evangelization, the missionaries employed the strategy of learning the *lingua franca* of those to be evangelized.⁵⁰ The ability of the MHM to learn and master the Lusamia, Lukhayo, Luwanga, Lubukusu, Lunyala, Lukhekhe, lutsoso, Lwidakho, Lwisukha Teso, Luo, and Kalenjin languages was a big boost in their evangelization in the area of.⁵¹ The missionaries were able to speak, write, and preach in the indigenous dialects of the area of study. The Bible and other liturgical books were translated into local languages to help in converting the local people easily. After learning, some missionaries spoke and wrote letters in the local language than the locals themselves. Fr. Stam is reported to have encouraged the newly posted priest, Fr. Coeren, not to waste anytime but immediately learn the local language to be more relevant in his missionary work.⁵² At Mumias, Fr. Stam, realizing that the Luo and the Baganda were working in police and civil services, made an effort to invite them and their families to come to the mission for lessons in their local languages. Learning and knowledge of more languages is

45. FGD Of the Catechists interviewed at at St. Annes Parish- Eshisiru.

46. G. E. M. Ogutu, (1981). "Origins and Growth of the Roman Catholic Church in Western Kenya 1895-1952. PhD Thesis, University of Nairobi, p.78.

47. F. Groot, *Op. Cit.*, p.101.

48. Petro Lubulela (88 Years, a Renown Retired Trade Unionist and a lay Church leader- Mukumu Parish), Oral Interview, at his home-Burimbuli, on 4th March, 2021.

49. F. Groot, *Op. Cit.*, p.150.

50. *Ibid*, p.150.

51. Healey, Joseph, Febian Pikiti, and Rose Musimba. "The Experience of Small Christian Communities (SCCs) in Eastern Africa (AMECEA Region) in Light of the African Year of Reconciliation (AYR) from 29 July, 2015 to 29 July, 2016." (2015). Wekesa, Peter Wafula. *History, Identity and the Bukusu-Bagisu Relations on the Kenya and Uganda Border*. Rowman & Littlefield, 2023. De Wolf, Jan Jacob. *Religious innovation and social change among the Bukusu*. University of London, School of Oriental and African Studies (United Kingdom), 1971.

52. Cf. Billings, Alan. *Lost Church: Why We Must Find It Again*. SPCK, 2013. Coeren, Michael. *The Future of Catholicism*. Signal, 2014.

an added advantage to the agents of evangelization,⁵³ especially in traversing and preaching to diverse people from various cultures.⁵⁴ Learning and speaking peoples' language makes the agents of evangelization to be accepted and appreciated.⁵⁵ The MHM were able to permeate peoples' culture and create a greater understanding of the people, which promoted integration and greater tolerance. The FGD of the Sisters of Mary of Kakamega observed that people were attracted to the missions because they were surprised to see a white "musungu" missionary speak their language. In the process, they became converted.⁵⁶ Some priests also found it hard to learn the local language fast, which was a great challenge. The study established that Mumias Mission station closed again in 1910 because Fr. Francis Van Agt could not speak the local language. Thus, the station had to close, notwithstanding other factors, until a priest who could speak Kiwanga was found. It became obvious that, to evangelize a tribe, the missionaries had first to learn the language of that tribe.⁵⁷

After planting the faith and creating the Missions, the MHM embarked on Catechesis.⁵⁸ Catechesis is the process of teaching the faith at different levels at all times to people of different ages, sex, and status.⁵⁹ Also, Catechesis is the instruction by a series of questions and answers from a book containing such instructions on the religious doctrine of the Christian Church to initiate people to the Catholic faith.⁶⁰ The study established that the MHM, with the help of the indigenous

53. Nelson Christoph, Julie. "Each one teach one: The legacy of evangelism in adult literacy education." *Written Communication* 26, no. 1 (2009): 77-110. Eke, Hyginus Ikechukwu. "Training of lay catechists and new evangelization in Igbo Land Nigeria, problems and prospects." PhD diss., Universität Tübingen, 2018.

54. The Very Rev. Fr. Joseph Sserunjogi is a rector of St. Mbaaga seminary Ggaba-Uganda. He speaks over ten international languages and teaches Canon Law in the Mbaaga seminary.

55. Kalusa, Walima T. "Language, medical auxiliaries, and the re-interpretation of missionary medicine in Colonial Mwinilunga, Zambia, 1922–51." *Journal of Eastern African Studies* 1, no. 1 (2007): 57-78. Wario, Damicha. "Effective Communication for Evangelisation Among the Borana People of Southern Ethiopia." (2005).

56. FGD, Sisters of Mary of Kakamega (SMK), at Nairobi Convent, on 30th October, 2021.

57. P. Sulumeti, (1970). *Op. Cit.*, p.136.

58. Namatsi, Beatrice A. "Pre-colonial traditional organization of the people of Vihiga and their early response to Friends' African Mission's Educational Initiatives in Kenya." (2013). Sikolia, Mulievi S. "Factors of development in the catholic church in Kakamega: from father Agt to bishop Sulumeti (1907-1992)." PhD diss., University of Nairobi, 1993.

59. Vincent Likunda (Priest of the Catholic Diocese of Kakamega and Dean of Mumias Deanery and a former Director of the Catechetical Centre –Mumisa), Key Informant Interview, at St Charles Lwanga Parish-Lutaso, on 6th August 2021.

60. Arnold, Clinton E. "Early Church Catechesis and New Christians'classes in Contemporary Evangelicalism." *Journal of the Evangelical Theological Society* 47, no. 1 (2004):

catechists and the graduated catechumens, did tremendous work in catechizing to initiate and convert the people to the faith in western Kenya.⁶¹ By 1902, the MHM had begun visiting Buluyia, and Baganda catechists accompanied them.⁶² The Baganda were already providing catechists to accompany the missionaries because, by 1879, the Baganda were already undergoing evangelization.⁶³ Thus, the presence of the Baganda significantly influenced the indigenous people in Mumias and other areas of Buluhya to become Catholics. Also, at Mumias, there were the Goans. The Goans had received evangelization as early as the time of St. Francis Xavier when he arrived at Goa as a missionary in AD 1541. From that time, many Goans became Catholics. Therefore, with the railway construction from Mombasa to Kisumu, the Goans settled along the railway. That is how they arrived at Kisumu, Mumias, and later at Kampala with their Catholic faith. Apart from the catechists, the presence of the Baganda, who were already Catholics, also enhanced the interests of the people of Buluyia to accept Christianity because they saw other Africans, the Baganda, who were already Catholics. Research already done in this area demonstrates that they formed classes for the catechism and literacy immediately after the priests arrived in these mission stations.⁶⁴ The classes were called "Readers" classes, '*Basomi bidiini*'. By 1907, Fr. Francis van Agt and Fr. Brandsma were already teaching catechism in Mumias and Mukumu.⁶⁵ Frs. Arnold Witlox, Gerard Meading, and the Baganda catechists taught the first "Readers" in Mukumu catechism.

Catechesis has been underscored as one of the major evangelization used by the missionaries. The catechesis instructions led to the creation of catechumenates. Catechumenate comes from the word Catechumen, a person who receives instruction in Christian religion to be baptized.⁶⁶ Thus, the catechumenates were schools or centres where the catechumens stayed as they underwent catechism classes in preparation for baptism. The use of catechumenate was one of the main

39. Buchanan, Michael T. "Pedagogical drift: The evolution of new approaches and paradigms in religious education." *Religious Education* 100, no. 1 (2005): 20-37.

61. Maurice Kigame, Key Informant Interview, at Christ the King Parish-Amalemba, on 12th August 2021.

62. H. Burgman, (1991). *Op. Cit.*, p.9.

63. Brierley, Jean, and Thomas Spear. "Mutesa, the missionaries, and Christian conversion in Buganda." *The International journal of African historical studies* 21, no. 4 (1988): 601-618. Kitoolo, John Vianney. "Evangelization and planting of the Church in Buganda." (2022).

64. H. Burgman, *Op. Cit.*, p. 9.

65. S. M. Mulievi S. "Factors of development in the catholic church in Kakamega: from father Agt to bishop Sulumeti (1907-1992)." PhD diss., University of Nairobi, 1993.

66. Arnold, Clinton E. "Early Church Catechesis and New Christians' classes in Contemporary Evangelicalism." *Journal of the Evangelical Theological Society* 47, no. 1 (2004): 39. Folkemer, Lawrence D. "A Study of the Catechumenate." *Church History* 15, no. 4 (1946): 286-307.

strategies of evangelization used by MHM.⁶⁷ Many catechumenates were created in Buluyia, and some respondents who attended these catechumenates were part of the respondents in this study. According to Sikolia (1993), although the newly baptized opened up the catechumenates, they remained under the white priest's directorship and apprenticeship.⁶⁸ The missionaries were particular on which catechumenates were to remain to do catechesis "attachment." Those who were primarily obedient, performed well in writing, memorized prayers in local and Latin languages, had the best Bible reading skills, and spoke fluent English were highly retained.⁶⁹ In essence, they became monitorial teachers. The Egyptians, Greeks, and Romans widely used the monitorial system in their education system during ancient times. It is a system where the abler pupils are used as "helpers" to the teacher for passing on the knowledge they have learned to other students. The research established that the Mill Hill Missionaries identified the best out of the neophyte Christians for evangelization in this system. Those who were catechized and initiated in the Church contributed immensely to the evangelization of Buluyia land. For example, the newly baptized in the Mukumu mission in 1908 were sent out (commissioned) to evangelize and teach catechism in different areas of the mission.⁷⁰ They opened up catechumenates in Idakho, Butso, Maragoli, Marama, and Bunyala areas of Buluyia. After they were baptized, they stayed at the mission for some time to be inducted into the pedagogies to carry out catechism.⁷¹ They went through some religious apprenticeships under the tutelage of the priests. Vincent Likunda averred that;

According to Fr. Stam, Catechumens were those who had been taught for one year and were retained at the parish to be trained on how to teach others. Fr Stam delegated those bright and had performed well to the centres of faith to teach catechism. They were likened to monitorial teachers.⁷²

67. Tuma, AD Tom. *The Introduction and Growth of Christianity in Busoga 1890-1940 With Particular Reference to the Roles of the Basoga Clergy, Catechists and Chiefs*. University of London, School of Oriental and African Studies (United Kingdom), 1973. De Wolf, Jan Jacob. *Religious innovation and social change among the Bukusu*. University of London, School of Oriental and African Studies (United Kingdom), 1971.

68. Sikolia, Mulievi S. "Factors of development in the catholic church in Kakamega: from father Agt to bishop Sulumeti (1907-1992)." PhD diss., University of Nairobi, 1993.

69. Cf. Whitney, Donald S. *Spiritual disciplines for the Christian life*. Tyndale House Publishers, Inc., 2014.

70. Brief History of Mukumu Written by parishoners in 1956, in an exercise book (Archives).

71. Grimshaw:" Some notes especially on the daily life of the missions (Archives).

72. Vincent Likunda (Priest of the Catholic Diocese of Kakamega and Dean of Mumias Deanery and a former Director of the Catechetical Centre –Mumisa), Key Informant Interview, at St Charles Lwanga Parish-Lutaso, on 6th August 2021.

Fr. Nicholas Stam personally instructed the catechumens before baptism. He strongly felt that these young men and women would be able to help him to evangelize the region, for he had thought of an interesting system of multiplying catechumenates.⁷³ Stam planned to send his newly baptized readers to the recently opened schools, where their task would be to teach the new readers prayers and the words of the catechism. Soon he ruled that the newly baptized Christians were to give a year of their lives to teach Religion as a token of gratitude to God for the gift of the new life they had received. This made for a quick spread of the faith, and soon, there were dozens of small schools.⁷⁴ Particularly successful was a young man from Marachi called Laurenti Ongoma, who from 1917 taught at the catechumenate in Butula, which later became a flourishing outstation of Mumias and eventually became a mission. It was indeed the challenge of the local language to the missionaries that they responded by recruiting the newly baptized to help evangelization be easily understood and facilitated. The local catechists had a mastery of their indigenous language. The presence of the newly baptized in teaching catechesis also attracted the local people to attend catechism classes. Moreover, the use of the freshly catechized demonstrated that the missionaries had a good interest in the indigenous people. According to Bishop Sulumeti, the catechumenates' role was critical because, in the areas where catechumates were created, they later became future mission stations (what today are parishes).⁷⁵ For example: Musoli, Kibabii, Butula, Amukura, Shikoti, Lutaso, Buyangu, Chamakanga, Nangina, Kiminini and Port Victoria.⁷⁶ The catechumens (Readers) gathered in these catechumenates to receive catechism, and they were later baptized and added to the pool of human power of evangelizers.⁷⁷ Through catechumates' strategy of evangelization, many followers of Catholicism were converted. Burgman posits that:

Fr. Nicholas Stam hit upon an interesting system of multiplying catechumenate. He selected six newly baptized readers and sent them out to start catechumenate, in which they had to teach prayers and the words of catechism to new readers. The

73. K. L. Lusambili, and P. G. Okoth. "Factors influencing evangelisation paradigm shift in the Catholic Diocese of Kakamega since 1978." *Steadfast Arts and Humanities* 2, no. 1 (2022). Brash, Donald James. *Pastoral authority in the churches of the first and second centuries*. Drew University, 1987. Sifuna, Daniel N. "The Mill Hill Fathers and the Establishment of Western Education in Westrn Kenya 1900–1924: Some Reflections." *Transafrican Journal of History* 6 (1977): 112-128.

74. Shelley, Bruce. *Church history in plain language*. Zondervan Academic, 2013. Garrison, V. David. *Church planting movements: How God is redeeming a lost world*. WIGTake Resources, 2007.

75. Philip Sulumeti (84 years, Emeritus Bishop of the Catholic Diocese of Kakamega), Key Informant Interview, at St. Phillips Emeritii House-Kakamega, on 12th August 2021.

76. Philip Sulumeti (84 years, Emeritus Bishop of the Catholic Diocese of Kakamega), Key Informant Interview, at St. Phillips Emeritii House-Kakamega, on 12th August 2021.

77. Life in Misssions in the Earliest Days Taken from the missionary Letters (Archives).

following generation of baptized were directed to do a year's teaching of Religion as a token of gratitude to God for the grace of baptism. This made for a rapid spread of the faith, and soon he had fifty catechumenates going.⁷⁸

The Buluyia region greatly benefited from the adult catechism compared to the school batch. Fr. Witlox and his strategy greatly favoured the adult catechism.⁷⁹ As they came with their Bulls to fight and participate in the dance, the adults were too given catechism classes. Adult catechism greatly enhanced the evangelization of families and communities at Mukumu Mission.⁸⁰ Unlike the school batch, the adult catechumens became catechists to their families, children, relatives, and the surrounding families. Mukumu mission station, according to Burgman, was heavily dependent on the adult catechism, and that explains why other missions blossomed more than the Mumias mission. Adult catechesis was very important. After all, they addressed a person who had greater responsibility and the capacity to live the Christian message in its fully developed form.⁸¹

Among the strategies of attracting more "Readers" to the missions or the catechumenate, the missions introduced literacy learning alongside catechism.⁸² For instance, when Fr. Francis van Agt moved to Mumias in 1907 as the superior of the station, he introduced the "Readers" classes in which reading, writing, and arithmetic (3R's)⁸³ were taught.⁸⁴ To Church Mission Society (*siemusi*, as the locals pronounced), somebody learning to become a Christian was called "a reader." "To pray and to read" became synonyms in several African languages.⁸⁵ The missionaries were part and parcel of the civilizing mission under the banner of introducing Civilization, Commerce, and Christianity (the famous 3Cs).⁸⁶ Nkomazana asserts, "according to T.F Baxton, the only way to end the slave trade in Africa was by civilizing the Africans, introducing legitimate trade, and converting Africans into

78. H. Burgman, *Op. Cit.*, p. 97.

79. Sikolia, Mulievi S. "Factors of development in the catholic church in Kakamega: from father Agt to bishop Sulumeti (1907-1992)." PhD diss., University of Nairobi, 1993.

80. K. L. Muchanga, (2006). *Op, Cit.*, p.41.

81. Pope John Paul II, (1997). *On Catechesis in Our Time* (No. 654). Washington DC: USCCB Publishing, p.31.

82. Annual Reports of the Diocese in Mukumu Archieves.

83. Sometimes Religion was added on the 3Rs to read as Reading, Writing, Arithmetic and Religion (4Rs).

84. M. S Sikolia, *Op. Cit.*, p.67.

85. Vincent Likunda Priest of the Catholic Diocese of Kakamega and Dean of Mumias Deanery and a former Dierector of the Catechetical Centre –Mumisa), Key Informant Interview, at St Charles Lwanga Parish-Lutaso, on 6th August 2021.

86. Gachihi, Margaret Wangui. "Faith and Nationalism: Mau Mau and Christianity in Kikuyuland." PhD dissertation, University of Nairobi, 2014. Turnbull, John. *A Voyage Round the World, in the Years 1800, 1801, 1802, 1803, and 1804: In Which the Author Visited Madeira, the Brazils, Cape of Good Hope, the English Settlements of Botany Bay and Norfolk Island, and the Principal Islands in the Pacific Ocean*. Cambridge University Press, 2013.

Christianity."⁸⁷ Education was part of the colonial package to modernize and civilize the Africans. This assertion emanated from the exploitative general imperialistic thought, where African resources were channelled to Europe.⁸⁸ The so-called legitimate trade was simply a strategy to make the Africans be slaved at home in Africa. Instead of being ferried across the oceans to work on farms in the Americas, they had to provide labour on white farms established in Africa.⁸⁹ Therefore, initiating legitimate trade was not a civilizing strategy, as Baxton asserts. According to Walter Rodney, nearly all imperialistic civilizing strategies were for the underdevelopment of Africa.⁹⁰ George Muhoho avers that, from the very beginning, the missionaries started with schools as means of evangelization. As late as 1911, the government started taking an interest in African education when the educational department was established.⁹¹

In 1912 when Mumias station was re-opened again, a school for the sons of the chiefs was opened.⁹² This was a mega strategy to appease and bring closer the local leadership to the mission. It was a strategy advanced in creating an enabling environment for planting the Church and eventual evangelization. Most of the local chiefs were delighted to have their sons go to mission schools to acquire literacy and be able to speak the language of the missionaries. The introduction of schools for the sons of chiefs permeated most of the mission stations in Buluyia.⁹³ According to Petro Lubulela, such a school was introduced in Mukumu (St. Machungwa) to intensify catechism and literacy learning in the 3Rs.⁹⁴ It was a way of enticing the chiefs, elders, and the local people to influence and cooperate with missionaries in planting the faith and evangelization of Buluyia. In the process of sons of chiefs turning up for literacy, they were also catechized and baptized, cementing the relationship between the missionaries and the local leadership. The "educated" and the baptized sons of chiefs also helped evangelize

87. F. Nkomazana, (1988). Livingstones Idea of Christianity, Commerce and Civilization in Botswana *Journal of African studies*, vol. 12 issue 1 & 2 p.47.

88. Viaene, Vincent. "King Leopold's imperialism and the origins of the Belgian colonial party, 1860–1905." *The Journal of Modern History* 80, no. 4 (2008): 741-790. Betts, Raymond F. *Assimilation and association in French colonial theory, 1890-1914*. U of Nebraska Press, 2005.

89. R. Law, ed., (1995). *From Slave Trade to Legitimate Commerce: The Commercial Transition in 19th Century West Africa*, Cambridge: Cambridge University Press, p.70.

90. W. Rodney, (1972). *How Europe Underdeveloped Africa*. Verso Books, p.84.

91. K. G. Muhoho, (1970). "The Church's Role in the Development of Educational Policy in the Pluralistic Society in Kenya" Unpublished PhD thesis in Pontifica Universitas Urbaniana, Rome, p.57.

92. Furley, O. W. "Education and the chiefs in East Africa in the inter-war period." *Transafrican Journal of History* 1, no. 1 (1971): 60-83.

93. Box XI: Mumias Diary 1 May 1916 till November 1920(135 numbered pages) by Nicholas Stam. (Archives).

94. Petro Lubulela, Oral interview, at his home-Burimbuli, on 4th March 2021.

their parents and peers.⁹⁵ From these schools, the sons of chiefs were given gifts like books, pens, and cotton clothes, and they could speak fluent English, *Lufuotfuot* or *Lulumba* or *Lunjerese* as the locals preferred to refer to English.

Thus, the other children in the village were attracted to join missionary schools to enjoy the same treatment. If not, they joined the catechumenates. Therefore, providing elementary literacy with catechism greatly boosted evangelization in the study area.⁹⁶ Modernization Theory explains the process of modernization within society. One of the ways society can be modernized is through education. The missionaries and the colonialists embraced education to enlighten the Africans and bring about a civilization by opening up remote areas.⁹⁷ Education is a catalyst for social change and development in general. The missionaries provided elementary literacy and, later on, elite education created a class of the "educated" who embraced Western ways of doing things. Later, in the 1940s, they became the vanguard of nationalism because they could articulate African grievances.⁹⁸ Thus, in as much as the missionaries provided elementary education to facilitate evangelization, it ended up fostering modernization in Western Kenya. Of importance to note was the erection of sub-parish councils in the region of study that contributed to evangelization. For example, in Mumias, the Christians of each locality were to hold a monthly meeting led by a headman and four 'jury-men' approved for settling cases. Their sentences were put in a 'Baraza-book,' and the priest added his signature later to make them valid. Apart from settling cases amicably, the meeting was to see to it that the preaching of the faith in that area was done well.⁹⁹ According to one informant, Peter Itebete, sub-parish councils cooperated with the mission priest to consolidate evangelization in the mission. Also, each member of the sub-parish council ensured that his family and the neighbourhoods were converted to the Catholic faith.¹⁰⁰ In this situation, the principle of subsidiarity worked out well in that the priest left the council to perform some of the activities at the mission and in the villages while he himself concentrated on the administration of the word of God and the administration of the sacraments. This was a model of lay involvement and collaboration in the Apostolate.

95. Ibid.

96. F. Groot, *Op. Cit.*, pp.102-103.

97. Cf. Taiwo, Olufemi. *How colonialism preempted modernity in Africa*. Indiana University Press, 2010. Dunch, Ryan. "Beyond cultural imperialism: Cultural theory, Christian missions, and global modernity." *History and Theory* 41, no. 3 (2002): 301-325.

98. Larmer, Miles. "Social movement struggles in Africa." *Review of African political economy* 37, no. 125 (2010): 251-262. Cooper, Frederick. *Africa since 1940: the past of the present*. Vol. 13. Cambridge University Press, 2019. Furedi, Frank. "The African Crowd1 in Nairobi: Popular Movements and Élite Politics." *The Journal of African History* 14, no. 2 (1973): 275-290.

99. Ibid, p.146.

100. Peter Itebete, Key Informant Interview, on 10th August 2021, at Muraka.

The study further unraveled that some Mill Hill missionaries associated well with civil authorities. Over the years, the Catholic Church believed that involving local leaders and elders enhances the spread of the faith. The example of the conversion of Emperor Constantine in the 3rd century A.D. remains a benchmark for the Church working in collaboration with the civic leaders.¹⁰¹ Fr. Stam's rapport with the civil authorities enabled him to get security and any help for his flock. During World War I, Stam made an effort to introduce himself to the colonial administrator and the important men in the Township of Mumias. In Mukumu, Fr. Witlox related well with Chiefs Shivachi of the Idakho and Milimu of the Isukha. Apart from local authorities, the missionaries related well with the colonial government. It has been argued by some scholars that the missionaries and the colonial officers were one and the same thing.¹⁰² That guaranteed the missionary security and land to erect the churches, hospitals, and schools, which became avenues of evangelization.

In this context, security was a challenge, and the response was to work hand in hand with the colonial government and the local authorities. Some local leaders were converted to Catholicism, and the chiefs' sons were educated at the missions.¹⁰³ This was to enhance the friendship and create an enabling environment for evangelizing the area.¹⁰⁴ The study indicated that the MHM related well with the civil authorities. For example, Fr. Stam associated himself with the local leaders in Busia, which made the local leaders give him their sons to join the *Catechumate* classes at Mumias. The relationship made even children born on the day he visited Busia to be called *Sitamu*, the local way of pronouncing Stam. The MHM were cognizant that once the local leaders were befriended and converted, the easier the conversion of their subjects.¹⁰⁵ Furthermore, the MHM identified themselves with the sufferings of the local people, for instance during the Banyala floods, and were charitable to the displaced persons. The grateful fishermen of the region never forgot what Fr. Nicholas Stam did for them. He protected the fishermen from the pirates, freebooters, and the little tyrants in the area to the

101. Cf. Sanneh, Lamin. *Translating the message: The missionary impact on culture*. No. 42. Orbis Books, 2015.

102. Porter, Andrew. "Cultural imperialism and protestant missionary enterprise, 1780-1914." *The Journal of Imperial and Commonwealth History* 25, no. 3 (1997): 367-391. Mani, Lata. *Contentious traditions: The debate on sati in colonial India*. Univ of California Press, 1998.

103. Berman, Edward H. "African responses to Christian mission education." *African Studies Review* 17, no. 3 (1974): 527-540. Akena, Francis Adyanga. "Critical analysis of the production of Western knowledge and its implications for Indigenous knowledge and decolonization." *Journal of Black Studies* 43, no. 6 (2012): 599-619

104. Philip Sulumeti (84 years, Emeritus Bishop of the Catholic Diocese of Kakamega), Key Informant Interview, at St. Phillips Emeritii House-Kakamega, on 12th August 2021.

105. Cf. Rooney, John. *A history of the Catholic Church in East Malaysia and Brunei (1880-1976)*. University of London, School of Oriental and African Studies (United Kingdom), 1981.

government. The study established that Chief Sudi Namachanja of the Bukusu was a formidable factor in the Catholic evangelization of Western Kenya. He was a local man, not one of Chief Mumia's appointees, and his authority among his people, the Bukusu, was great. As early as 1916, Stam had found out that Sudi had taken a personal interest in the Christian readers at Syoya and even drilled the military style. In 1918, Sudi cooperated with the building of a church at Kibabii, and for a while, there was even a talk of transferring the Mumias mission to Kibabii in Sudi's territory. Later, Chief Sudi's son, Maurice Michael Otunga, joined the seminary and was ordained a priest in 1950, consecrated a bishop in 1957, and created Cardinal in 1973 by Pope Paul VI.¹⁰⁶ He retired as the Archbishop of Nairobi and died in 2003. The Pope has declared him the "Servant of God," which means he is on the way to being beatified to become "Blessed" and *Deo volente* to be canonized and become a "Saint." In terms of infrastructure, apart from putting up a church in Kibabii, Chief Namachanja Sudi later gave the Church his own land on which St. Augustine Mabanga seminary was built. All this can be traced to Fr. Nicholas Stam, who created a good rapport with the local leadership to evangelize effectively. Chief Sudi's name is forever linked to the Church among the Bukusu: he gave them the mission of Kibabii. He is, indeed, linked to the Christians of Kenya, for he gave his son Maurice Otunga, who became their first Bishop, Archbishop, and Cardinal.¹⁰⁷

The support given by Chief Sudi Namachanja facilitated evangelization in Bukusu land, especially the construction of the Church at Kibabii and influencing the Bukusu to convert to Catholicism. During World War I, there was recruitment and forced conscription of the people into the King's army as porters. Even the catechumens were recruited to serve as porters with the army in the campaign to fight the Germans in Tanganyika.¹⁰⁸ At first, the catechumens were exempted, but they had to be recruited with time. Fr. Nicholas Stam had to quickly talk to the chief in Bunyala, who, in the process of protecting the Catechumen from being recruited, demanded that the catechumens could do some work for the chief but be protected from the efforts of recruiting them. Therefore, the FGD CDKK Catholic Men Association reported that during World War I, there were many catechumens at the Missions because of the fear of conscription into the army of His Majesty the King.¹⁰⁹ Thus within the challenge of war, there arose an opportunity for evangelization. The Missionaries responded by expanding the

106. H. Burgman, *Op. Cit.*, p.237-238.

107. H. Burgman, *Op. Cit.*, p.110.

108. Cunningham, Tom. "Missionaries, the State, and Labour in Colonial Kenya c. 1909–c. 1919: the 'Gospel of Work' and the 'Able-Bodied Male Native'." In *History Workshop Journal*. 2022. Yorke, Edmund. "The Spectre of a Second Chilembwe: Government, Missions, and Social Control in Wartime Northern Rhodesia, 1914–18." *The Journal of African History* 31, no. 3 (1990): 373-391.

109. FGD CDKK Catholic Men Association, at St Joseph Cathedral Parish-Kakamega, on 23rd October 2021.

facilities at the mission to allow many local men who were afraid to join the war to undertake catechesis classes.

Furthermore, the period also witnessed some opportunities, which enhanced evangelization. For instance, during World War I (1914-1918), evangelization intensified because the few baptized Africans began to take on teaching catechism seriously. The areas where the Germans were missionaries became empty, and newly baptized Africans had to step in by making them catechumens for evangelization.¹¹⁰ The German priests who belonged to MHM had to leave because the British and the Germans were at war. M. S. Sikolia reports, "The 'readers' continued going to school, and by 1916, the interest in the Christian faith was increasing, and the number of Christians was rising."¹¹¹ During World War I (1914-1918), the British recruited Africans to help them fight the Germans. Therefore, those who were afraid to be conscripted decided to flock to the missions for protection, and in the process, they were evangelized. Thus, notwithstanding the atrocities of the war, something good emerged. The wartime created an enabling environment, an opportunity, for the enhancement of evangelization. African participation in evangelization and the expansion of the Catholic missions increased.

The study revealed that the involvement of lay people, particularly in constructing and repairing their dwellings, played a significant role in enhancing evangelization in the region. Their active participation fostered a sense of ownership and acceptance of the evangelization process. It also facilitated the conversion of their families and influenced others to join the Catholic faith. The MHM had recognized the importance of involving the laity in the apostolate early on, and Nicholas Stam, in particular, embraced the strategy of collaborative ministry. He engaged the laity in teaching catechism, resolving disputes, and various tasks within the mission. By doing so, he was in tune with the Theory of Challenge and Response and Social Cognitive Learning Theory in terms of imparting faith and handing on knowledge via modelling, imitation, and attitudinal change among the faithful.¹¹²

The beatification of the Uganda martyrs had a profound impact on the evangelization of Uganda and East Africa. Fr. Nicholas Stam and the people of Mumias celebrated for three days when the martyrs were beatified in Rome on June 6, 1920. The story of the martyrs became a central theme in Stam's teaching and preaching. Learning that their fellow Africans were becoming Saints fascinated the people in Western Kenya, and many took on the names of the Uganda martyrs at their baptism. The event of beatification greatly inspired evangelization and instilled hope, as the lives and martyrdom of the Ugandans served as a

110. Box XI: Mumias Diary II November 1920 till 1936 by Nicholas Stam (Archives).

111. M. S. Sikolia, *Op. Cit.*, p.59.

112. Windahl, Sven, Benno Signitzer, and Jean T. Olson. *Using communication theory: An introduction to planned communication*. Sage, 2008.

powerful testament to the Gospel, motivating many in western Kenya to embrace the Catholic faith.

Another important reason for the Missionary success was that the chiefs and headmen in many locations of Luyia land were men from Wanga, brothers of Mumia, mostly Muslims, who the colonial administration installed. These leaders had made themselves leaders of the local people who wanted people of their own as chiefs. By supporting the mission, the local population undermined the existing power structure of the Wanga domination. Fr. Stam, therefore, was not slow to take advantage of these sentiments. Consciously or unconsciously, he acted like an alternative leader for Christians; because he, too, was not a friend of the Muslims.

The research revealed that, evangelization and conversions in this period were done through charitable services. The missionaries put up Mumias and Mukumu hospitals, in 1935 and 1938 respectively, in which they offered medical care to the sick and cared for the needy. The sisters played an important role in providing medical services. According to Lubulela, some of those who turned up to be treated decided to become Catholics.¹¹³ Some who were ransomed from slavery or other inhuman practices were kept in the missions, taught Christianity, and given a chance to live a successful agricultural life.¹¹⁴ Kizito Muchanga, in his master's thesis, explained that during famines, the Catholic Church played a significant role in finding food for the flock (Laity). During the famine of 1941-1943 (*Inzala ya Kuta*), Brother Michael, popularly known as "Mikayili," who was in charge of the Mukumu Mission Farm, made plans to acquire cassava from Uganda.¹¹⁵ This strategy was also implied in the reports of the D.C. of North Nyanza or Kavirondo who commended Brother Michael for his charitable works.¹¹⁶ One Key informant, Peter Itebete, remarked that the move made by "Mikayili" was necessary at the time because it later turned into an evangelization strategy. He retorted that, many people who had left the Church because of famine returned. When food was distributed to all people, including non-Catholics, further conversions to Catholicism were realized. During this period of famine, many mission stations for both Catholics and Quackers had closed. However, with the charitable evangelization strategy of the Church, many people returned to the mission stations.¹¹⁷

113. Petro Lubulela(88 Years, a Renown Retired Trade Unionist and a lay Church leader- Mukumu Parish), Oral Interview, at his home-Burimbuli, on 4th March, 2021.

114. P. Sulumeti, (1970). *Op. Cit.*, p.129.

115. K. L. Muchanga, (1998). Impact of Economic Activities on the Ecology of the Isukha and Idakho Areas of Western Kenya, c. 1850 to 1945, Masters Thesis in History, Kenyatta University, p. 207.

116. KNA, DC/NN. /26/1943.

117. Peter Itebete (90 Years, Retired Senior Civil Service Officer in the Government of Kenya), Key Informant Interview, at his home-Muraka, on 6th May 2021.

Therefore, it is indisputable that the charitable works of the Catholic Church played an integral role in evangelization, leading to conversions.

Of significant to note is the Plokosian¹¹⁸ evangelization strategy is associated with Fr. Arnold Witlox (*Pere Lokosi*). He arrived at Mukumu Mission in 1908 and studied the situation of the people in that area. He observed that the Isukha and the Idakho folk loved their cultural festivals, especially the *Isukuti* dance, *Shilembe* (Traditional Ceremony to honor a fallen hero among the Isukha Idakho), bullfighting sport, and the drinking of the local brew called *Busaa* (traditional brew made from fermented maize and millet).¹¹⁹ Therefore, to bring the people closer to the mission for evangelization, Witlox identified himself with the Isukha and Idakho cultural practices.¹²⁰ Once in a while, he joined the people in those cultural dances and even liked their local brew. After every liturgical celebration, Fr. Witlox would invite people to the *Isukuti* dances and *Busaa* drinking, in which he actively participated.¹²¹ After dances, there followed catechetical instructions via question and answer methods. He respected the culture of the people, identified with them, spoke their language fluently, ate their food, took their brew, and within a short time, the Mukumu mission was blossoming and beaming with converts. Thus, people came to like him, and humanely he became a centre of attraction, while spiritually, a miracle took place. The people began flocking to the Mukumu Mission and liked to belong to the Catholic faith.¹²²

In this case, Fr. Witlox understood and isolated the local people's cultural values; which he adopted to suit the situation, therefore attracting the people to the Church, unlike what was taking place elsewhere in the region.¹²³ Witlox understood that, for the effective evangelization of a people, it was important to know and understand their culture and be able to speak their language. That is why Witlox has remained in the annals of Mukumu Mission history as one of the great shepherds. On the "plokosian" methodology of evangelization, Vincent Likunda added his voice by asserting that, Witlox made Sunday dances to be known as *masitsa* or *mumasitsa*.¹²⁴ According to Burgman (1991), it was a resounding success, a marvelous apostolic medium. Since then, Mukumu has remained a

118. Plokosi was the native corruption of Fr. Witlox. Unable to pronounce it simply referred to Fr. Arnold Witlox as Plokosi. That is why his strategy of evangelization has been coined as Plokosian Strategy.

119. Peter Itebete (90 Years, Retired Senior Civil Service Officer in the Government of Kenya), Key Informant Interview, at his home-Muraka, on 6th May 2021.

120. KNA: DC/NN.3/2/2 Notes on Some Customs and Beliefs, 1931(Archives).

121. Cf. Brief History of Mukumu Written by parishoners in 1956, in an exercise Book (Archives)

122. H. Burgman, (1991), *Op. Cit.* p.69.

123. M. S. Sikolia, 1993, p.70.

124. Vincent Likunda Priest of the Catholic Diocese of Kakamega and Dean of Mumias Deanery and a former Director of the Catechetical Centre –Mumisa), Key Informant Interview, at St Charles Lwanga Parish-Lutaso, on 6th August 2021.

strong and vibrant Catholic mission. Although the Church was yet to deliberate on inculturation as a strategy in evangelization by this time, Fr. Witlox already had the idea. He could also settle disputes among the people. This approach attracted many people, even the chiefs and elders.¹²⁵ Apart from the Plokosian strategy, Witlox had a good relationship with the local leaders. He related well with the chiefs and elders. He organized meetings with them to solve issues and appreciated them for providing security.

According to Muchanga Kizito, the Plokosian strategy greatly impacted the region of Abakakamega. From the Mukumu mission, the following parishes were created: Eregi opened in 1913, Shikoti in 1952, Musoli in 1956, Shibuye in 1958, Kakamega Cathedral in 1968, Shitoli in 1989, and Irenji in 2016. These are parishes that directly emerged from the mother, Mukumu Parish.¹²⁶ Parishes indirectly connected to the Mukumu mission via Plokosian strategy include Shiseso and Lufumbo Parishes, which sprang from Musoli Parish. Mukomari, Mukulusu, and Muranda Parishes have emerged from Shibuye. From Eregi parish emerged Erusui, Hambale, Buyangu, Chamakanga, Emalindi and Luanda parishes. From Shikoti parish, there emerged Lusumu, Lutaso, Malava, Eshisiru, Lubao and Chimoi. From Kakamega Cathedral, Lutonyi and Amalemba parishes have been created.¹²⁷

It has to be noted that Plokosian strategy of evangelization was not received well by some of his colleagues and the protestant churches in the area. Some Quakers at Kaimosi defected to the Catholic Church at Mukumu because the latter allowed them to drink alcohol and remain Christians.¹²⁸ Some of his critics, among them Fr. Nicholas Stam, believed that the missionaries had come to drive out the devil from Africans, and some of his favourite hiding places were the traditional dances. The Bisukha dancing was seen as immoral. For example the Bisukha while dancing wriggled their hips, swinging their bottoms, and making their breasts tremble. Indeed, this was immorality in its most blatant form! So Fr. Witlox's method was not taken over in any other mission.¹²⁹ His critics were suspicious of *isukuti* dance songs and cultural activities as they were regarded as adulteration of the true faith, the Christian faith. They associated it with demonic

125. Annual Reports of The Diocese in Mukumu Archives.

126. H. Burgman, *Op. Cit.*, p.78.

127. K. L. Muchanga, (2006). "Deeper Evangelization: A Challenge to Basic Catechesis in Mukumu Parish, Diocese of Kakamega", BA Dissertation, St. Mbaaga's Major Seminary-Ggaba (Ug), p. 4.

128. M. S. Sikolia, *Op. Cit.*, p. 69. Wasike, Elijah. "Alienation of Abashitaho's land rights, 1920-1963." PhD diss., Kenyatta University, 2018. Simwa, Linus PI. "The establishment and impact of friends church among the Tiriki of western Kenya." PhD diss., University of Nairobi, 2015.

129. H. Burgman, *Op. Cit.*, p.69.

forces and hence devilish dances.¹³⁰ It was unfair for some Mill Hill priests to associate the Isukha-Idakho dances with the devil. The assumption that African culture and practices were primitive, pagan, and devilish stemmed from a lack of understanding of the African culture. This mindset was influenced by the Darwinian Social Theory, which considered only the 'superior race' as having godly religion and culture. However, the study revealed that effective evangelization requires an understanding of the people's worldview. Fr. Witlox's approach, known as the Plokosian strategy, was highly praised as he successfully integrated many people into Catholicism, leading them into the catechumenate. His strategy even prevented the Bisukha people from resorting to suicide. This acknowledgment countered the notion that African practices led to moral degeneration and highlighted Fr. Witlox's unique apostolic role.¹³¹ This awful custom of hanging themselves had reached its peak in 1912. However, with evangelization, it dramatically reduced. In the diary for the mission, there is evidence that on 23rd March 1913, about one hundred and fourteen (114) Christians received Holy Communion and had opened a mission in Maragoli land (Eregi).¹³²

Among the Mill Hill Missionaries, some did not favour inculturation in Christian worship. T. L Hassan gives the general reasons why the missionaries did not embrace inculturation. He strongly believes that the missionaries possessed the "*conquista mentality*," in which they acted more as patriotic Europeans than men of the Holy Bible.¹³³ In the *conquista mentality*, the missionaries identified themselves with the colonizers. They were indeed a spiritual wing of the colonizers. Ngugi wa Thiong'o voiced his concern that the priests and the colonial District Commissioner (DC) were the same.¹³⁴ In that, they acted like Lords and rode on the powers of the European state. Thus, their sense of patriotism inhibited the messengers from interrogating their national identity and values from the point of view of Gospel values.¹³⁵ The European government's collaboration and close conduct with missionaries (the Church) contributed to the latter's arrogance. The Church manifested itself in Africa through imperialism within the political and ecclesiastical context. Imperialism by nature and character is inimical to dialogue since the latter presupposes some degree of equality and respect from the interlocutor.

Apart from the *conquista mentality*, it relived the crusading mentality of medieval Christianity. According to Hassan (2015), the crusading mentality was

130. Petro Lubulela (88 Years, a Renown Retired Trade Unionist and a lay Church leader- Mukumu Parish), Oral Interview, at his home-Burimbuli, on 4th March, 2021.

131. H. Burgman, *Op. Cit.*, p.69.: Mukumu Archives: Nicholas Stam: Short History of Eregi: Mukumu Archives: Nicholas Stam : Short History of Vicariate Kisumu (Archives).

132. H. Burgman, *Op. Cit.*, p.69.

133. T. Hassan, *Op. Cit.*, p.34.

134. Ngugi WA Thiong'o, (1987). *Detained: A Writer's Prison Diary* (Vol. 240). Nairobi: East African Publishers, p. 12.

135. Tugume, (2015). *Op. Cit*, p.194.

endemic within the missionary movement in Africa. To re-assert the position of the Church, the missionaries looked at African religions and cultures as obstacles to evangelization. While the enemies of the Church in Europe were Muslims, the enemy was the divine healer and all his paraphernalia and accoutrements in Africa.¹³⁶ Because of this, Tugume states:

The missionaries saw it as his duty to destroy all forms of Pagan beliefs and instil an unadulterated form of Religion in Africa. Because of the exclusiveness associated with this crusading mentality, the missionaries of this era were not inclined to show respect for the value of the African to choose his or her Religion, what to believe, and what not to believe. The missionaries finally ravaged African culture and religious systems, and history.¹³⁷

Inculturation was delayed or not allowed because, all along, the missionaries had a negative attitude toward African Religion and culture. Fr. Mose de Acosta (S.J.) classified civilizations and cultures where;

... the western intruders were included to rate the Asian cultures as highest though still below the level of Anglican civilizations as next best and Black Africans jostling for the bottom position with the Carribs, the Tupi, and other unnamed "savages" of the new world.¹³⁸

Western scholars, including Christians, have never been genuinely interested in the African Religion. Their works have all been part and parcel of some controversy or debate in the Western world.¹³⁹ Their works depicted the deep convictions that Africans were "bocais (*ita est* clowns)" best suited for converting immortal souls. For this reason, Christian missionaries in Africa were not of African World view; they were thus unprepared to adapt to local conditions and environment. Rather they were only prepared to give what they believed and knew. Thus, their attitude was inimical to dialogue, explaining the ultimate failure to eradicate the African Religion. With the Vatican Council II and the subsequent Popes, the door for inculturation in the Church was opened.

Finally and fundamentally, no evangelization could ever take place in western part of Kenya without the Holy Spirit and the grace provided by Jesus Christ, the founder of Christianity. According to the historian St. Luke,¹⁴⁰ the

136. Ibid, p. 197.

137. Ibid, p.198.

138. Boxer, (1978). *Op. Cit*, p.78.

139. R. Lister, F. Williams, A. Anttonen, U. Gerhard, & J. Bussemaker, (2007). *Gendering Citizenship in Western Europe: New challenges for Citizenship Research in a Cross-National Context*. Policy Press, p.5.

140. St. Luke was both a physician as well as a historian. His main books in the Bible are the Gospel of Luke and the Acts of the Apostles. Looking at the introduction of the

Holy Spirit works in two main ways; to empower the agents of evangelization as witnesses and to use the gospel to bring about belief. Jesus said: "But you will receive power when the Holy Spirit come upon you and you will be my witnesses in Jerusalem, and in all Judea and Samaria and to the end of the earth"¹⁴¹ The Holy spirit is the principle evangelising agent, it is He who pushes and announces the gospel and the intimacy of the conscience. He welcomes and makes it possible to understand the words of salvation.¹⁴² Therefore, based on the many challenges, MHM encountered in this region of western Kenya, the study concurs with bishop Sulumeti assertion that the missionaries relied on the power of the Holy Spirit to evangelize western Kenya. The Holy Spirit is thus the comforter, and He calmed the fears and filled the hope of the missionaries. Without the Holy Spirit, evangelization would not have been effective. According to Pope Francis, without Holy Spirit, evangelisation is empty advertising. To him the Holy Spirit is the protagonist of evangelization,¹⁴³ a fact which this study underscored.

The study identified key historical events that played a significant role in shaping evangelization in Western Kenya. These events include the establishment of mission stations, World War One (1914-1918), the inter-war period (1919-1939), World War Two (1939-1945), the influence of individual bishops, the fight for independence (1945-1963), and the Vatican II Council (1962-1965). The Mill Hill missionaries intensified their evangelization efforts in the area from 1904 onwards, resulting in the establishment of numerous mission stations by 1978. The establishment of the Prefecture Apostolic Kavirondo and the presence of the Ursuline sisters further contributed to the growth of evangelization in the region.¹⁴⁴

The contributions of individual bishops and priests were crucial in the progress of evangelization. Bishop Brandsma (1926-1935) established schools and founded the Sisters of Mary Congregation. Bishop Nicholas Stam (1935-1948) actively opened and visited mission stations. Bishop Fredrick Hall succeeded him, and the post-World War II era saw the development of vibrant mission centers.¹⁴⁵ The Hospitals, schools, and convents began flourishing in the Mill Hill region. During Bishop Fredrick Hall's regime (1948-1963), the number of missions increased explosively.¹⁴⁶ The biggest expansion took place in Luyia-Land, where 14 new missions were opened: Kitale, Misikhu, Kisoko, Shikoti, Lutaso, Mundika, Buyangu, Kiminini, Musoli, Chamakanga, Shibuye, Hambale and Erusui.¹⁴⁷ The

Gospel of Luke and the Acts of the Apostles (Prologues) the historical method of data collection used by Luke is well illustrated. Luke 1:1-4 and Acts 1: 1-5.

141. Acts of the Apostles, 1:18.

142. *Evangelli Nundiatti* no. 75.

143. Pope Francis during his weekly general Audience in St. Peter Square on 22nd March 2023 in *Catholic Courier*.

144. Pius VI, (1775-1799). Apostolic Letter, *Ut Aucto*, in A. A. S. Vol. XVIII, pp.87-88.

145. H. Burgman, *Op. Cit.*, p.245.

146. *Ibid*, p.246.

147. *Ibid*, p.246.

proliferation of mission centers indicated increased conversions, highlighting the effectiveness of evangelization. Bishop Fredrick Hall played a significant role in collaborating with his priests to evangelize Buluyia and neighboring areas.

Following him, Bishop John de Reeper (1963-1976) revitalized the Church by introducing parish councils, emphasizing the Catholic family movement, and improving Sunday services in outstations without priests.¹⁴⁸ This was the time of the Vatican II Council (1962-1965). The Vatican II Council is a big benchmark in the History of the Church. The Council Fathers proclaimed many changes that enhanced evangelization in the Catholic Church. For example changes in liturgy included the change from Latin to other local languages, a move that enhanced evangelisation in the Catholic Church. Within this spirit, Bishop John de Reeper took over the Diocese and focused on what would improve evangelization. Burgman describes Bishop John de Reeper as a brilliant, optimistic and focused shepherd.¹⁴⁹ He equipped his Diocese with the new structures of collegiality with the clergy and religious participation, creating a big force of evangelization agents. Prior, the Sisters were not involved in evangelization, but with Bishop John de Reeper, all the institutions in the Church were to step up as agents of evangelization. By introducing improved Sunday services in outstations without priests, Bishop de Reeper involved the Laity, especially the catechists, in evangelization true to the spirit of the Vatican II council.¹⁵⁰ It was in this context that Mumias Catechist Training Centre (CTC) was established in 1962 to train lay people as catechists, who played a significant role as agents of evangelisation. In 1976, Bishop Philip Sulumeti took over the Diocese of Kisumu from John de Reeper as the first African (Black) bishop. Following the steps of his successors, Bishop Sulumeti demonstrated strong apostolic zeal. In 1978 Diocese of Kakamega was created from the Diocese of Kisumu. The new Diocese encompassed the entire former Western Province of Kenya, including Kakamega, Bungoma, and Busia Districts. According to Sulumeti (Bishop Emeritus), the Holy Father Pope Paul VI decided to move him to the new Diocese because it was expensive, highly populated, and needed an experienced Bishop.¹⁵¹

World War I (1914-1918) had a significant impact as many people joined the army and realized the importance of literacy. Catechetical centers were transformed into schools to accommodate the growing desire for education. This period coincided with Wilson Woodrow's declaration of self-determination and the Great Depression (mid-1920s to mid-1930s). The inter-war period (1919-1939) saw the rise of independent churches and schools, aligned with the spirit of self-determination. The Second World War (1939-1945) facilitated the ordination of indigenous Africans as priests, and by 1957, the first African bishop was

148. Ibid, p.279.

149. Ibid, p.277.

150. Ibid, p.247.

151. Philip Sulumeti (84 years, Emeritus Bishop of the Catholic Diocese of Kakamega), Key Informant Interview, at St. Philips Emeritii House-Kakamega, on 28th March 2021.

consecrated in Kenya. These events significantly influenced and intensified evangelization efforts.

Conclusion

This article provides a historical account of evangelization in Western Kenya from 1902-1978, highlighting key events and individuals involved in spreading the faith in the region. The study examines various determinants and strategies employed during the establishment of the Church, including Kerygma, baptisms, creation of catechumenates, and literacy initiatives. The success in addressing challenges relied heavily on the expertise and leadership of bishops such as Brandsma, Nicholas Stam, Fredrick Hall, John de Keeper, and Philip Sulumeti. The study sheds light on the diverse approaches and contributions that shaped evangelization in Western Kenya during this period.

Finally, the article has authenticated that the determinants of evangelization in Western Kenya was influenced by various historical events that took place in this period. For example, the Catholic and Protestant conflicts in Uganda led to the coming of Mill Hill, and the Islamic factor in Mumias remained a challenge to the evangelisation in Mumias mission and its progress. The Islamic challenge was exacerbated by the Wanga traditionalists who tried to oppose the new Religion. First and Second World Wars affected evangelization too. After the war, the clamour for independence in Kenya was also felt in the Church, and hence a paradigm shift led to the consecration of African priests to Bishopric.

The drastic paradigm shift in evangelization was realized after the Vatican II Council (1962-1965) brought tremendous changes in the Church that has affected evangelization to date. Finally, the theoretical framework of this study has manifested itself in contextualizing and interrogating the data in this article. Functionalism theory has helped evaluate how a Church has functioned and purposed to evangelize through her various structures. The challenge and response theory has given a milieu for evaluating how the various challenges inspired and motivated the various Bishops, priests, and catechists to respond to them in the process of evangelization. The article has clearly established that opportunities became a reality within the various evangelization challenges/ obstacles. The challenges motivated the Church leaders to moot various strategies that suited evangelization at that time.

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