

**CATEGORY OF ‘HAPPINESS’:  
ETYMOLOGY, ‘OBJECTIVE’ INDICATORS, ELEMENTS, AND FORMULA FOR  
HAPPINESS**

G.I. KOLESNIKOVA

*Kolesnikova Galina Ivanovna - doctor of Philosophical Sciences Full Professor, independent expert on the problems of consciousness and its impact, corresponding member of the Russian Academy of Natural Sciences (RAE), member of the International scientific community-International Academy of Natural History (IANH), philologist, psychologist, Professor department of Philosophy GO VPO Donetsk National University of Economics and Trade named after Michael Tugan-Baranovsky Donetsk city, Russia.*

ORCID /0000-0002-4760-9839

SPIN-код 5044-8598

*Address:* 347900, Taganrog, Aleksandrovskaya 76, kv. 13.

*Mobile:* +7928-1527198

*E-mail:* [galina\\_kolesnik@mail.ru](mailto:galina_kolesnik@mail.ru)

[galina\\_ivanovna@kolesnikova.red](mailto:galina_ivanovna@kolesnikova.red)

*Russia*

### **Summary**

The article reviews the category of ‘happiness’ along three lines: etymological discourse, ‘objective’ indicators and elements of happiness as a social/cultural phenomenon, as well as the author's proposed formula for happiness. The relevance of this study is determined by the fact that human resource is the main resource of the State, and the future of the country depends on the well-being of each individual. As a result of the etymological discourse, the following conclusions have been drawn: 1, the category of ‘happiness’ is a more recent entity; 2, the ancient Greek categories of ‘good’ and ‘the highest good’ are its progenitors; 3, in the West European philosophy, good is understood inconsistently and includes the range from its utilitarian meaning to its connection with the notion of ‘value’; 4, the category of ‘happiness’ includes two aspects: one under the control of a man and another determined by external factors. Thus, in understanding happiness, most studies focus on either social/biological or social/economic components. The author proposes an integrative formula for happiness, which has the following elements: 1, ‘why’/belief system: life according to one’s own convictions; 2, ‘what’/abilities: their fulfilment in a professional/cognitive activity, i.e. the implementation of cognitive interest; 3, ‘where’/the place for fulfilling one’s life, understood as a geographical and climatic space; 4, ‘with

whom’/ communication with people the person truly likes and who like him/her, while keeping a socially acceptable distance of a detached polite interaction with the rest of the social space. Therefore, happiness is the harmony of triune: the person with the Self, the Self with the world and the world with the Self.

**Key words:** happiness, good, individual, society, state, human resource, formula for happiness.

**Galina Ivanovna Kolesnikova** is a philologist, psychologist, Doctor of philosophy, Professor, Professor at the Department of Social and Pedagogical Technologies and Deviant Behavior Pedagogy of V. I. Vernadsky Crimean Federal University, Humanities and Education Science Academy (Branch) in Yalta, Institute of Pedagogy, Psychology and Inclusive Education.

[galina\\_ivanovna@kolesnikova.red](mailto:galina_ivanovna@kolesnikova.red)

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ORCID /0000-0002-4760-9839

SPIN-code 5044-8598

**Introduction.** It is quite natural that the State has a constitutional obligation to recognise, observe and protect the rights and freedoms of an individual under Article 2 of the Constitution of the Russian Federation ‘because human resource is the main resource of the State, and the well-being of the country ultimately depends on the development of each individual’ [Kolesnikova 2017, 102]. Therefore, it is vital to determine the components of individual’s happiness to form an adequate social [Kenadie T. Wilkerson 2017] and economic policy, both domestically and internationally. This statement is indirectly confirmed by the plan to set up a Russia's first international laboratory at the Tomsk State University to research the criteria of happiness, as Evgeny A. Kovalevsky, Deputy Chairman at the Tomsk Branch of the Russian Geographical Society, declared at the roundtable in the Moscow City Duma. Meanwhile, the Kingdom of Bhutan already has the Centre for Bhutan Studies of Happiness, whose research was used to develop the concept of the Gross National Happiness, which, along with GDP indices, is factored in to evaluate the standard of living in the Kingdom.

However, before determining the components of the formula for happiness it is necessary to: 1, study the etymology of this category; 2, identify ‘objective’ indicators of happiness (if any); 3, examine the elements of happiness using the formulas for happiness proposed earlier; 4, define the author’s formula for happiness.

**Main part.**

First: etymological discourse. Since the category of ‘happiness’ is a more recent entity, accordingly, to determine its conceptual content, we inevitably have to focus on its ‘progenitor’ - the category of ‘good’. Ancient Greek texts use the category of ‘happiness’ rather casually owing to paradoxes of translation; in

much the same way as the original word ‘fruit’ in the Bible was translated as an ‘apple’ and was spread further. We believe that at some point in time, originally different concepts were replaced (we are speaking about the categories of ‘good’ and ‘happiness’), and later the category of ‘good’ was completely forced out. (Whether it was done deliberately or by confusion, is the topic for another discussion, just like the notion of ‘ether’, which was actively applied by Tesla in his research, was ‘withdrawn’ from science).

The ancient Greek language had two categories related by the principle of basis and superstructure – ‘αγαθόν’ – ‘good’ and ‘Eudaimonia’ – ‘highest good’ [Kozlova 2012]. However, in the ancient Greek tradition, almost every philosopher filled the category of ‘good’ with his own meaning. For example, for Pythagoras good was ‘to know the perfection of numbers’ [Afonasina 2013]; for Socrates good was understanding, reasoning, and memory [Rybakova 2013]; for Plato it was beauty, measure and truth [Mesyats 2012]; for Aristotle good meant virtuous actions, as well as ‘the good achievable by action’ [Seregin 2017]. However, philosophers agreed upon one thing that only an educated and wise man could understand good (so, understanding this category was the result of uniting wisdom and knowledge), and, consequently, could take concerted efforts to achieve it. At the same time, Socrates is more of a supporter to understand the individual good based on general grounds that we have mentioned above. Plato seeks the Universal Good. Aristotle believes that there is no and cannot be the universal good, and introduces the concept of the Final good, defining it as ‘desirable in itself and never for the sake of something else’, ‘lacking in nothing’ and ‘self-sufficient’ (‘is something final and self-sufficient, and is the end of action’ [Aristotle, 58, 62, 63]).

‘Eudaimonia’ consists of two words: eu (good) and daimon (spirit) – literally - the benevolence of gods perceived as a ‘divine fate’, not in the utilitarian sense, but as a divine part of the soul, which makes a man capable of contemplation and wisdom, leading to the highest good, the divine fate. And here it is important to dwell on the second component of “the highest good” – ‘daimon’ because Homer uses the word ‘daimon’ not only to refer to the acting agent directly related to fate, but also to give a vague definition of deity in general. Back in 1904, Danish researcher O. Jorgensen, comparing the special features of god nominations by Homer in cases when epic heroes speak and when the poet himself narrates the story of events, discovered that when the epic heroes attributed the responsibility for something that suddenly happened beyond their control to a superhuman force, the poet put into their mouths such vague names of this force as θεός (‘God’) or ‘daimon’ (‘demon’, ‘genius’). And the poet himself puts down this event to the intervention of a certain god (see, for example: ‘Iliad’, XV, 460-473). [Goran 1990, 123-124]. So, V.P. Goran continues: ‘A genius gets a man by lot at the moment the man is born, ... .... According to traditional beliefs, the lots distributed by Lachesis can be called individual paths of life, fates, destinies ....But he (Plato) still left these samples on Lachesis’ knees, which we see as one of relics of traditional ideas about the role of this goddess. Also, relics of ideas about the old role of Lachesis are expressed in the concept that once the soul selects a sample of life for itself, and hence a relevant

genius, it approaches Lachesis in the manner determined by lot, who sends this genius with the man as his guardian and guarantor of fulfilling his choice (see: Plato. Republic, 620 d-e) [Goran 1990, 162]. In other words, 'daimon' (close to the concept of 'genius' in the Roman civilization) is a divine spark (one of the most important notions in Socrates' philosophy) serving as a guide (inner voice) directing the man to fulfil his destiny (fate), but only if the man 'listens' to his daimon. Probably, the famous saying of Seneca is based on these ideas about the relationship between fate and a man: 'Fate leads the willing (to fulfil destiny, fate, genius) and drags the reluctant.' The most complete definition of the highest good can be found in Aristotle's work – it is 'a virtuous activity of soul... Of the remaining goods, some must necessarily pre-exist as conditions of happiness, and others are naturally co-operative and useful instruments' [Aristotle, 69].

Thus, in the ancient Greek ethics, the highest good - eudaimonia - includes two aspects: subjective (the person himself defines the degree of his satisfaction with life) and objective – the existence of external goods (e.g., nice living conditions). However, almost all philosophers of ancient Greece agree that neither wealth nor luxury corrupts a man, in contrast to the Roman tradition, which used a utilitarian concept of 'Fortuna' with two meanings – 'luck' and 'destiny' - as a rough equivalent of 'good'. Being a calque of the name of the goddess of fate - Fortune, it personifies the divine mercy given only to the worthy. That is, the perception of good / happiness as a category was practical and was perceived as welfare and the possibility to fulfil one's needs. The lowest social strata had a slightly different, more primitive concept, whereas good / happiness / pleasure were construed as ecstatic unity with gods who can, if they wish, grant a more decent life. Additionally, it is important to note the activity aspect encompassed in Aristotle's definition of the highest good, as well as the relevance of activity proper to the goal-setting.

Thus, in the ancient Greek tradition of understanding 'the highest good', we find a harmonious combination of hedonistic and practical aspects. (Similar understanding can be found in the ideas of Abraham Maslow [Maslow 1970] who distinguishes higher and basic needs, saying that higher ones cannot be formed if basic ones are unsatisfied; although right here he stipulates that the history knows examples of men focused on higher needs, while their basic needs were barely satisfied).

With the dominance of the Christian ideology, the understanding of good / happiness changes dramatically, meaning above all, humility and subsequent reward or retribution: the church fathers rearranged ideas of ancient philosophers based on the principle of theism, raising the quality of the highest good - summum bonum – God, both as the source and the ultimate goal of human life.

In the modern age philosophy, emphasis in classifying something as good is transferred to the subject (*Hobbes, Spinoza*), and good is construed solely in the utilitarian sense. However, by the middle of the nineteenth century, the notion of 'good' was replaced by the notion of 'value' (H. Rickert), and the good began to be perceived exclusively in the sense of 'welfare'. The topic of relationship between good and value is still debatable. Thus, at one time, the Baden school of Neo-Kantianism preferred to oppose good

and values, defining 'good' as an abstract sample similar to the Ideas of Plato. In the modern philosophy, the concept of good was developed by G. E. Moore [Moore 1903, 1912, 1922] who considered, among other things, the 'philosophical grammar' to be 'a good one' and 'good'; by the phenomenological school of M. Scheler [Scheler 1913] who laid a great emphasis on Guterethik [Guterethik 1933] ('ethics of goods'); by N. Hartmann [Hartmann 1933].

In the late 19th - early 20th century, representatives of the Russian religious philosophy criticised the idea of happiness as the main principle of human life. V. Soloviev [Soloviev 1891] argued that the concept of happiness had no moral nature and could not serve as the basis of ethics. V. Rozanov [Rozanov 1982], N. Berdyaev [Berdyaev 1931] opposed the pursuit of meaning, as a focus on something valuable in the world, to the pursuit of happiness.

Thus, in the philosophy of the twentieth and twenty-first century, the study of good was conducted along the following lines: is the meaning of 'good' an objective quality or a subjective evaluation? [Craig Lambert 2007]; is it possible to correlate utilitarian, hedonistic, and spiritual values to the notion of 'good'?; does 'the highest good' exist, and if so, what is its content?; are the notion of 'good' and the hierarchy of goods specific to the ancient world relevant now? [Shigehiro Oishi, Jesse Graham, Selin Kesebir 2013]

According to V. Tatarkevich [Shevchuk 2015], who most fully explored this category, characteristics of happiness are similar to the concept of 'good'. However, from the social and philosophical standpoint, the category of 'happiness' includes two aspects: one under the control of a man and another determined by external factors. Furthermore, the first aspect is closely related to virtues the man possesses and moral norms to which he either adheres or not.

Second: 'objective' indicators of happiness. Attempts to identify the 'objective' indicators of happiness were made along 4 main lines.

1). Theory of satisfying needs or Theory of achieving goals: the satisfaction of needs leads to happiness. That is, happiness is a result: to be happy you should understand what you need and fill these voids.

2). Theory of activity, theory of process: doing the activity you like makes you happy. In other words, the process itself, not its result brings happiness. Do what you like and be happy. At the beginning of the 20th century, J. B. Watson conducted the first actual questionnaire survey to identify the sources of happiness. In the early 40ies of the 20th century, psychologist E.L. Thorndike systematised factors that, from his point of view, led to satisfaction with life: satisfaction of physical needs; satisfaction of needs in mental and physical activity; satisfaction of social needs; and personal success. Please note that both the 'sources' and the 'factors' are external.

3). Theory of congenital predisposition: the level of happiness is innate. By the way, this theory has been confirmed by genetics. 'Geneticists have proved that for a happy life appropriate genes are required,

or rather a 5-HTTLPR gene, which is responsible for transporting serotonin ('the happiness hormone'). Scientists at the London School of Medicine and the School of Economics interviewed several thousand people. The results show that volunteers who had two copies of the happiness gene from both parents proved to be optimistic and not prone to depression. The results of the study were published by Jan-Emmanuel de Neve in the Journal of Human Genetics [Istrov 2016].

But, in our opinion, it is wrong to equate happiness / unhappiness and depression, as one can be happy but feel sad about the world's fate. Besides, it is possible that those who are called depressive are not, in fact, those who think about bad things, but those who think.

4) Economic theory. It is close to the theory of satisfied needs, with an emphasis on the economic factor [Lavrova 2012].

In this respect, research headed by R. Veenhoven is highly popular in the modern scientific space. Based on his concept, the level of happiness of the country's population correlates to its level of economic development. According to him, the population of Western Europe and North America is the happiest. However, data from other studies contradict his results: the level of happiness hardly depends on the standard of living (provided that this level does not fall below a certain minimum). And this actually confirms the Maslow's concept. For example, sociologists of the British Foundation NEF [Shmatova, Morev 2015] revealed the following: residents of islands in the Pacific, Colombia, Costa Rica, Panama, Cuba, and Honduras (and other Latin American countries) have the highest index of happiness; residents of 'developed' countries have the lowest index of happiness - Great Britain has the 108th place, France - 129th, and the USA - 150th. However, the fact that Russia has the 172nd and Ukraine has the 174th place in this list suggests that the happiness index is not directly correlated to the quality of life and rather depends on other factors.

Third: the previously proposed formulas for happiness and their elements. In the history of science, attempts were made to create the formula for happiness. The best known are the following.

1. The formula for happiness by M. Seligman (C) [Seligman 1990, 1998, 2006]:  $S + C + V = \text{Happiness}$ , where S is our biological set point (genetically predetermined level of happiness) - 50%; C is external conditions of living (family, children, religion, daily activities) - 10%; V is voluntary actions or choices we make daily, i.e. conscious, intentional and effort demanding actions - 40%.

2. In 2003 British scientists proposed the following formula for happiness [8]:  $\text{Happiness} = P + (5xE) + (3xH)$ , where P stands for Personal characteristics, including outlook on life, beliefs; E stands for Existence and relates to financial stability, health; and N represents Higher Order needs and covers self-esteem, sense of humour, and sociability.

3. Mathematicians and psychologists from the University College London (the study results are presented in the Nature Communications journal) have determined that  $\text{Happiness} = \text{congenital or acquired empathy as a character trait} + \text{equality} - \text{tendency to feel envy and guilt}$ . They determined this

formula by conducting experiments with volunteers. ‘They were asked to perform a series of tasks to assess the level of happiness and the factors affecting it. The final connections and regularities were presented in the form of a complex formula. In one task, the volunteers were asked how they would like to anonymously split a small amount of money with another person that they had just met. In another task, they played monetary gambles that they could win or lose and were told that they would see what another person received from the same gamble. In general, the unequal result reduced the level of happiness: people did not like it if they won more (guilt) or less (envy) money than the strangers they had just met. In addition, the results show that the dynamics of the respondents’ happiness is determined not by random factors, such as sympathy or antipathy to the stranger, but stable psychological personality traits — tendency to feel envy and guilt. ... The scientists suggest that generosity towards strangers relates to how our happiness is affected by the inequalities we experience in our daily life. Moreover, this ‘formula for happiness’ can also be used to accurately measure empathy (an important factor for diagnosing and treating personality disorders)’ [Krasnov 2014].

4. From the point of view of N.K. Mikhailovsky [Vyazinkin 2012], a person is too individual to be identified through statistical or mathematical data, and therefore there can be no single happiness for all. The desire for personal happiness is natural, and at the heart of it there are autonomy and freedom, as well as a uniform change of impressions in the constant desire to develop and expand the range of one’s life.

5. Separately, we would like to mention the spiritual tradition of the East [Ioseliani 2014]; in its context, happiness is understood as a natural state of a man, while maya, delusions, and illusions prevent him from apprehending it, so the path is to overcome them; following this path, happiness is not so much gained as apprehended.

Thus, in understanding happiness, most modern studies focus on either social/biological or social/economic components (e.g., R. Veenhoven - economic aspects of happiness), disregarding spiritual and mental aspects (Bhagwan Shree Rajneesh (Osho), D. Suzuki).

So, we can see the juxtaposition of two approaches to understanding happiness: the individualised social/economic approach specific to the European culture, and the spiritual tradition of the East, which interprets happiness as a natural state of a human being. The Slavic tradition takes up the middle position. Whereas, the European tradition of happiness relates to an ‘*external*’ position with regard to a person; the Slavic tradition relates to an ‘*internal*’ one, and the Eastern tradition of happiness, in our view, is undisputedly a ‘*meta*’ position.

## **Conclusion**

Fourth: the author's formula for happiness. In our opinion, *a harmonic unity of corporal / material / social and spiritual / emotional in a person, like Euler circles, creates the uniqueness of human existence.*

In other words, *happiness is the state of harmony. The harmony results from the unity of subjective and objective; the subjective is understood as the system of beliefs and aspirations of a person, while the objective is a set of person's living conditions created through his expedient activity.*

We can distinguish *four basic components in the unity of ideal (internal) and material (external) as doings, implementation, outside expression, into the matter of ideal*: 1, **'why'/belief system**: life according to one's own convictions; 2, **'what'/abilities**: their fulfilment in a professional/cognitive activity, i.e. the implementation of cognitive interest; 3, **'where'/the place for fulfilling one's life**, understood as a geographical and climatic space; 4, **'with whom'/ communication** with people the person truly likes and who like him, while keeping a socially acceptable distance of a detached polite interaction with the rest of the social space.\_

Thus, happiness is the harmony of triune: the person with the Self, the Self with the world and the world with the Self.

We have not singled out any personal qualities that contribute to the achievement of happiness because we believe that one can *a priori think about happiness* in one's own human way *only in relation to a person guided by a rational aesthetic principle, an educated and civilised person*, not a barbarian. (Whereas, we do not equate the notion of an 'educated and civilised person' to a 'person with a higher education' or a 'person holding a high-profile job' because in the modern world, unfortunately, these do not coincide).

The topics of upbringing and education of a person guided by the rational aesthetic principle, as well as factors that positively or negatively impact this process [Kolesnikova 2018], have been developed by the author of the article in other papers.

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