*Stoic Lessons in Liberation: Epictetus as Educator*

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My project examines the pedagogical approach of the Stoic Epictetus by focusing on seven vital lessons he imparts. This study will deepen our understanding of his vocation as a Stoic educator striving to free his students from the fears and foolishness that hold happiness hostage. These lessons are (1) how freedom, integrity, self-respect, and happiness interrelate; (2) real versus fake tragedy and real versus fake heroism; (3) the instructive roles that various animals play in Stoic education; (4) athleticism, sport, and game-playing as analogies for striving to live virtuously; (5) place, time, and progress in the journey to self-realization; (6) how to live with death and exit life fearlessly; (7) how teaching wisdom is one of several ways the Stoic sage loves others.

The book contains an introduction and eight chapters. The Introduction will (a) present the central thesis—Epictetus teaches Stoicism as a means of liberating oneself from unhappiness—and (b) outline the plan for the eight subsequent chapters.  Chapter One will study how Epictetus’ thought was shaped by his teacher (Musonius Rufus), Epictetus’ impact on his students and especially on the chronicler of his lectures (Arrian), and Epictetus’ pedagogical methods. Each of the subsequent chapters presents a vital lesson he seeks to teach his students, the adolescent Stoics-in-training. Chapter Two examines the fundamental dichotomy of what is up to us versus what is not at the heart of his teaching. I will show how this dichotomy grounds his conception of freedom, the pursuit of virtue, the growth of self-respect, and his Stoic conception of happiness.  In Chapter Three I will articulate Epictetus’ understanding of tragedy and heroism.  Epictetus compares his favorite paragon Socrates to the mythic heroes Achilles, Agamemnon, Odysseus, and Heracles.  Criticism of vicious human conduct by means of these heroic human exemplars is followed by criticisms of bestial human behavior using admirable animal traits and habits in Chapter Four.  In Chapter Five I will discuss how the analogies of athletic training, sporting contests, and skillful game-playing is used by Epictetus to illustrate the proper understanding of practical agency. Olympic athletes model training of the body for Epictetus’ students, for whom Stoicism is a kind of Olympic training of the mind.  Chapter Six will study how Stoics travel by making good use of whatever they encounter along their chosen path as on loan from providential Nature. Virtue, as real self-realization, is the destination of the Stoic’s life journey.  An analysis of Epictetus’ philosophy of death and suicide will occupy Chapter Seven. He argues that for a Stoic to fear death is as foolish as a child to fear a scary looking mask. Since ‘the door is open’ for exiting from circumstances we judge to be unbearable, we have the capacity to cope with any challenges we face.  The final chapter (Eight) analyzes the Stoic sage (wise person). The sage loves others freely, not possessively. The sage represents a prescriptive ideal by teaching Stoic wisdom.  The overarching thesis of this project is that Stoic education is the indispensable means of liberating the self from miserable servitude to external circumstances resulting from failure to understand, appreciate, and realize human potential.

Introduction. Stoicism as Liberation

This book’s main thesis is that Stoicism is fundamentally a philosophy of liberation which Epictetus, a master practitioner of Stoic pedagogy, taught as such. The introduction outlines the plan of the book in support of this thesis. The practice of Stoicism in the daily application of Stoic thinking and therapies to one’s lived experience free the mind to be happy. Foolish beliefs produce frustrations and fears. Fears enslave the mind and ensure misery. From birth and well into adulthood, Epictetus was intimately familiar with slavery, both as institutionally sanctioned ownership of one human being by another, and as a brand of servitude to false, debilitating beliefs. As a student of Musonius Rufus in Rome, Epictetus learned the power of Stoic wisdom to break the bonds of those mentally enslaving beliefs. Once manumitted, Epictetus dedicated himself to teaching lessons aimed at freeing others from the fears and foolishness that ruin lives. After exploring Epictetus’ philosophical and pedagogical pedigree in Chapter One, each of the subsequent seven chapters will focus on a particular lesson in liberation.

Chapter One.  Musonius Rufus, Epictetus, Flavius Arrianus, and Stoic Pedagogy

I will examine the heritage of Stoic education and pedagogy in Musonius, Epictetus, and Arrian.  My account will benefit from Lutz 1947, Geytenbeek 1963, Engel 2000, Nussbaum 2002, Wirth 1967, Stadter 1980, and Bénatouïl 2009.  Oldfather claimed that “there can be no doubt but the system of thought in the pupil [Epictetus] is little more than an echo, with changes of emphasis due to the personal equation, of that of the master [M. Rufus]” (I, p. viii, note 2).  I reject this view and argue for Epictetus’ innovations over Musonius’ few extant texts. I will also part company with the nuanced position of Inwood (2017), who argues that Musonius “strove for and imitated Stoic views” but was not a canonical Stoic (275). I will contend that the evidence suggests not that Musonius wasn’t a Stoic, but that he was more intent on living out his Stoic scruples earnestly in practice than Seneca, who, with his sharper intellect, immersed himself in Stoic theory, argument, and rhetorical sophistication. Musonius’ zeal for making his students into sturdy Stoics was passed onto Epictetus.  Musonius’ student Lucius thought that he stood in the same relationship to Musonius as Xenophon to Socrates. Arrian also fashioned his relationship to his teacher Epictetus after Xenophon’s relationship to Socrates.  But Epictetus’ portrait of Socrates relies much more heavily on Plato than on Xenophon. Study of the similarities and differences of the pedagogical methods of Musonius and Epictetus will elucidate Epictetus the diatribist, his use of the Socratic elenchus, and the other teaching techniques he employs in trying to inculcate Stoic wisdom in his pupils, as well as the reception of that teaching by Arrian.

Chapter Two. What is up to Us vs. What is Not: Freedom, Self-Respect, and Stoic Happiness

In this chapter I will argue that grasping the dichotomy between what is up to us and what is not up to us is both fundamental to his educational project and key to understanding how his conception of freedom and responsibility engenders the pursuit of integrity and the self-respect which brings happiness. My analysis will benefit from Frede 2007, Willms 2011, Braicovich 2010, and Bobzien 1998.

Epictetus often describes the life in agreement with nature (the Stoic definition of the end) as the life of willing only what Zeus wills, i.e., accepting all events as divinely ordained.  Yet I will contend that the argumentative foundation of his ethical theory need *not* rely on an appeal to cosmic providence (and thus is consonant with the contemporary attempt to secularize and naturalize Stoicism effected by Becker 2017), but rather runs as follows:  (1) All things can be divided into those things that are entirely, by their nature, always up to us, and those things that are not; (2) We are happy when we get what we want and avoid what we dislike, and we are miserable otherwise; (3) Therefore, the art of living consists in training ourselves to limit our desires to the things up to us and extinguishing our desires for the things not up to us.

From this position—that happiness is found in concentrating on the things up to us—Epictetus infers that happiness derives from the *virtuous* choices of the faculty of judgment (προαίρεσις).  I will argue that Epictetus does not hold that imperturbability simply consists in possession of the virtues, but rather it results from the recognition that one’s moral integrity is unassailable.  Since respect is due to the person of moral integrity, once a Stoic commits himself to attaining the virtues and over time develops a virtuous character, he gradually earns self-respect.  This self-respect constitutes the only kind of happiness worthy of a free person.

Chapter Three.  Epictetus on Tragedy, Homeric Unheroes, and Stoic Heroism

I will review the earlier work on Epictetus and Socrates (Schweingruber 1943; Jagu 1946; Wirth 1967; Döring 1974, 1979; Long 2002; Johnson 2012; Brouwer 2014) and develop my own analysis of Epictetus’ account of the Stoic hero.  I begin with a discussion of Epictetus’ deflationary analysis of tragedy.  Epictetus’ treatment of Achilles, Agamemnon, Odysseus, and Heracles yields several criticisms and a few praises of these four putative heroes.  This evaluation establishes a framework to distinguish the portrait of the Stoic hero from the figure of the tragic Homeric unhero.  The four features of Stoic heroism are (1) the demonstrated capacity to meet challenges head on, energetically, with courage and fortitude; (2) performance of allotted tasks without complaint, resentment, or self-pity; (3) self-sufficiency; and (4) emotional detachment from loved ones that preserves happiness wherever one goes. Diogenes the Cynic exceled in all four of these traits and so for Epictetus he was unquestionably heroic. But in addition, Diogenes was specially called to be a messenger of the gods and king among men (Schofield 2007), and the requirements for fulfilling this calling made him a *singular* hero. For this reason, though Epictetus greatly admires Cynicism as a noble way of life (Billerbeck 1978), he is not sanguine that his students can pull it off.  In contrast Epictetus heroizes Socrates to present his students a more accessible and realistic model of the Stoic sage than is represented by Diogenes.  I will argue that Socrates is Epictetus’ favorite hero because Socrates, as husband, father, soldier, Athenian citizen and councilor, embodies a true *Stoic* exemplar in contrast to Diogenes, the childless, politically indifferent, and often indecorous bachelor (Branham and Goulet-Cazé 1996) who was handpicked by the gods.  The figure of Socrates is thus a more appropriate exemplar for Epictetus’ students, who, armed with their Stoic education, must enter conventional Roman public life.  Despite the daunting challenge of perfecting one’s own character to the degree achieved by Socrates, Epictetus offers the exhortation that those who wish to become true Stoics should at least *want* to be like Socrates.  That is, one good strategy the Stoic *prokoptōn* (progressor) can use in coping with the many difficult situations encountered in his *askēsis* (training) is to think of how Socrates would deal with them.

Chapter Four.  Epictetus’ Zoo: Animal Examples in Stoic Teaching

Many previous studies of Epictetus (Bonhöffer 1890 and 1894, Colardeau 1903, Capelle 1948) and of the Stoics’ account of animals (Dierauer 1977, Sorabji 1993) have missed the great frequency of the use of animal behaviors scattered throughout the *Discourses* and *Encheiridion* and underplayed their significance (Long 2002 is an exception).  I explore the multifarious protreptic roles these texts play in Epictetus’ teachings.  I specify the points on which Epictetus’ views of animals diverge from those of earlier Stoics (cf. Sorabji 1993). I argue that Epictetus deploys animal analogies and illustrations to vividly evoke the most humane and admirable impulses from his students.

Epictetus uses numerous examples of animal behavior as foils for advancing normative appeals.  For example, he urges his students *not* to act like sheep by acting for the sake of the belly or the genitals or at random or in a filthy way or without consideration.  Yet, since sheep do not bring their fodder to the shepherds to show how much they have eaten, but rather digest their food internally and produce their wool and milk externally, Epictetus instructs his students similarly not to display their Stoic principles to laymen, but rather to show them the *actions* that result from these principles once they have been digested internally.  Some human beings abandon their children, but neither sheep nor wolves desert *their* offspring.  Another favorite example he uses is the ass.  While the natural invincibility of the ass is its stubborn immobility, Epictetus’ students must recognize that the natural invincibility of human beings lies instead in the rational, virtuous operation of the *prohairesis*. The dog, the horse, and the crow each have their natural abilities (cp. Jennison 2005).

From examples like these, Epictetus infers the general principle that each individual specimen’s virtue and vice must be measured by the natural powers of its species (cp. Rowlands 2012).  Yet Epictetus faults pigs, geese, worms, and spiders for not being clean in the way that horses and pure-bred dogs are. So, he is not concerned with following this principle consistently.  His animal examples are strictly offered as protreptic lessons for his students. They constitute no coherent, systematic zoology.  On the other hand, it is significant that he praises the love of freedom displayed by some lions and some birds, who starve themselves rather than live confined in cages (and this idea that imprisonment, as a kind of enslavement, is worse than death anticipates Chapter Seven).  He scolds his students who whine and pine for people and places far away by reminding them that crows and ravens are free of homesickness.  My conclusion will be that Epictetus employs descriptions of the powers and habits of various animals to support his case for the possibility of human moral progress (*prokopē*). This chapter revises Stephens 2014*b*.

Chapter Five.  Epictetus at Play: Sport, Games, and the Stoic Athlete

How can the Stoic maintain both confident equanimity and at the same time exercise due care?  Epictetus replies that his students ought to imitate those who play dice (*Disc.* 2.5.1-3) or children playing with potsherds (4.7.5).  Game-players recognize that since the game equipment itself is indifferent, they need only concentrate on making skillful, conscientious use of that equipment.  This confident care in handling externals is similarly represented by how skillful ball-players play their sport (2.5.15-21).  The Stoic also knows when to quit playing the game (1.25.7-8; 4.7.19; 4.7.29-31) and that while we can quit the pancratium, quitting from philosophy does no good (3.10.6-9).  Epictetus compares Stoic training to the strenuous regimen of Olympic athletes (1.24.1-3; 2.18.22; 3.15.1-7; *Ench.* 51.2) and to Olympic competition (3.22.51-52) (see Tarrant 2003).  Study of these texts will illustrate the power of this sport metaphor in Epictetus’ pedagogy.  The upshot is that though few will be ‘Olympic victors’ in virtue, all can ‘compete’ in and benefit from Stoic training.  Strength of concentration, discipline of desire, stamina of purpose, and graceful decision-making are the goals of the Stoic seriously training to be an athlete of the mind.  But the Stoic is free to be playful about games and carefree about their outcomes, since games are not morally serious (cf. Feezell 2004 and 2013).  The Stoic thus plays with both serious sagacity and carefree confidence.  This chapter will build upon Stephens and Feezell 2004.

Chapter Six.  Epictetus on Journeys: The Providential Tourist

What lesson does Epictetus impart to his students by reflecting on journeys through space and time?  In this chapter I will show how exile, refuge, homecoming, pilgrimage, emigration, immigration, commuting, and tourism all afford Epictetus vehicles for teaching Stoicism.  The unstoic traveler is an accidental tourist who seeks tranquility by trying to control features of trips that are ultimately beyond his control.  The Stoic sojourner, by contrast, wisely concerns herself only with what is up to her, leaving to providence all factors of time, geography, and topography that are not up to her.  This makes the Stoic a providential tourist.  In the ancient Mediterranean, bad weather could drown sea travelers, bandits could raid caravans, and even fellow travelers might steal, assault, abandon, or murder the unlucky.  How should one deal with the uncertainties and hazards of travel?  What judgments guide our decisions about when and where to travel?  The Stoic’s responsibilities flowing from her natural and acquired relations dictate when travel should and should not be undertaken.  When it is undertaken, the Stoic must prepare herself mentally to anticipate the kinds of setbacks and perils that may befall her.  The Stoic can adapt to whatever locales and circumstances she ventures into, since everywhere she goes she is a *cosmopolitēs* and so is never lost in the world (cp. Montiglio 2005).  Exile is not a terrible thing for the Stoic.  She can make good use of whatever ‘preferred indifferents’ come her way, without foolishly becoming emotionally attached to those hotel amenities.  Whatever her eventual destination and itinerary turn out to be, her desires can harmonize with the rational, fated, providential governance of the cosmos.  As wise travelers treat an inn as something not their own, so Epictetus teaches his students that Stoics treat all externals as temporary items that are not their own.  The travelers/inn simile teaches the lesson that the Stoic can benefit from all her sojourns and excursions and thus make good progress traversing the path of her life. As long as she approaches virtue, the trip that is her life can be judged a success. This chapter revises Stephens 2007*b* and borrows from Stephens 2018*a*.

Chapter Seven.  Epictetus on Death: Bugbear and Open Door Policy

Death, like pain, sickness, ugliness, and poverty, is among the dispreferred indifferents of Stoic ethical theory.  Yet non-Stoics commonly regard it as the worst evil.  In Plato’s *Apology*, Socrates holds that (for him) death will be a blessing, since it is either the end of consciousness and so like an eternal, dreamless sleep, or else a relocation of the soul to an afterlife where he can philosophize with deceased heroes.  Either way, Socrates finds no reason to fear death.

Learning what death really is and is not, how to live with the deaths of others, and how to exit life wisely are crucial lessons in Epictetus’ classroom. Epictetus adds several new twists to Socrates’ argument against fearing death.  Following the Stoic rejection of the possibility of the soul’s surviving the death of the body, Epictetus matter-of-factly teaches that all living things die, and that death is nothing tragic, but merely a necessary part of a natural cycle.  Epictetus holds that death is a mere bogey that did not frighten Socrates, and so it is not to be feared by rational adults.  I reject Erler 2007 that Epictetus interprets Socrates to hold that only if the immortality of the soul can be proved can it be shown that death is a bugbear which is not to be feared.  In fact, Epictetus does not believe that personal consciousness survives the dissolution of soul and body upon death.  Both soul and body disintegrate upon death and the constituents of each are recycled by nature.  Indeed, Epictetus maintains that death is really a haven, since it is always an exit through which we can escape circumstances in life we judge to be intolerable.  For this reason Epictetus concludes that nothing that befalls us in life is intolerable; suicide remains a viable option.

Yet Epictetus teaches that some grounds for suicide are justified, while others are not. The Christian sensibilities of Bonhöffer 1894 engender his judgment that Epictetus’ various remarks on suicide do not form a consistent doctrine on suicide that coheres with other Stoic principles.  But I argue that Epictetus endorses these eight assertions: (a) the cosmic perspective on death is essential for understanding why death is an indifferent; (b) a person can be justified in deciding not to take steps that increase the likelihood he will survive; (c) a person can be justified in deciding to exit life; (d) the justification of such life or death decisions is autonomous; (e) the identity of a human being is a union of a particular body with a particular soul, neither of which survives death; (f) knowledge that we mortals can opt for death is comforting; (g) understanding assertions (a) through (f) frees us to pursue the virtuous life fearlessly, whereas (h) the false belief that death is bad grounds the fear of death, which, as the epitome of all human evils, cripples our ability to live virtuously.  These assertions constitute a coherent thanatology and a consistent lesson about suicide, Epictetus’ Open Door Policy. This chapter slightly revises Stephens 2014*a*.

Chapter Eight.  The Stoic Lover, Educator, and Liberator

This chapter will examine how Epictetus’ philosophy of love, philosophy of education, and philosophy of freedom are interconnected. I argue that Epictetus believes that providing a Stoic education to adults is the greatest gift of love and liberation. I will respond to Inwood 1997, Becker 2004, and Reydams-Schils 2005, thereby updating Stephens 1996.  There I show that in Epictetus’ view (1) the Stoic sage genuinely loves and is affectionate to her family and friends; (2) *only* the Stoic sage is, properly speaking, possessed of the power to love (*philein*); and (3) the Stoic sage loves in a robustly *rational* way that excludes passionate, erotic love.  Justice motivates the sage to *show* compassion to others by, for example, when appropriate, providing them a helping hand or material aid, but not to internalize their mistaken opinion that material possessions are comparable to virtue or moral integrity.  Stoic happiness arises and grows as one gains (approaches) virtue, recognizes this progress, and becomes increasingly justified in having self-respect.  Stoic happiness is not promoted by a mere *feeling* of compassion for others that fails to motivate *actions* that externalize in the world the justice internal to the sage.  I suggest that the love of the Stoic sage for others manifests itself secondarily in striving to improve their material conditions, social circumstances, and/or civil liberties, but primarily in transmitting to them her inner wealth, i.e., her wisdom.  In making this argument I critique Nussbaum 2003.  The Stoic of modest means loves others best by teaching them Stoicism and fulfilling her familial, social, and civic roles.  If a Stoic were somehow, against the odds, to become affluent, her philanthropy would materialize in prudent, just, and generous donations.  My position is thus more optimistic about the possibilities of Stoic love than Inwood 1997.  Stoicism taught and learned in a loving manner coupled with tough training (*askēsis*) allow for moral progress (*prokopē*) and ultimately self-liberation.  I contend that Epictetus’ explicit link between Stoic education and liberation from vice and misery inspires a conception of the Stoic sage as a worthy prescriptive ideal for educators. To love adult human beings requires striving to help them become wise, free, and live virtuously together. Philanthropy requires promulgating Stoic philosophy, which is the real love of wisdom.

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