

## Article

# Rethinking Ricci's Missionary Strategy: The Disputes between Buglio and Schall

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**Abstract:** During the late Ming Dynasty period, the Jesuits carried out a cultural accommodation strategy in China, commonly known as Ricci's Strategy, due to the significant role played by Matteo Ricci (1552–1610) during this process. This strategy encompassed three elements: evangelizing through science and technology, establishing connections with the upper class, and compiling books to spread evangelism, all of which helped Catholicism to be promoted in China and be accepted by the Chinese people collectively. But the strategy also drew a lot of opposition within and outside of the Society of Jesus, some of which even led to the Rites Controversy. The extant literature primarily focuses on the conflicts that arose between the Society of Jesus and other religious orders, as well as the divergent viewpoints within the Society itself, like Niccolò Longobardo (1559–1654)'s well-documented anti-Ricccian position. However, this approach largely ignored the disputes that arose within the Jesuit community in Beijing during the 17th century, mainly involving Ludovico Buglio (1606–1682) and Adam Schall (1592–1666) as two key figures on opposing sides. These disputes primarily centered around three points: the inclusion of superstitious elements in the calendar, the identities of the Jesuits in Early Qing, and the approach to inculcating theology. Although these historical events offered new perspectives and materials for the study of Ricci's Strategy, they have received limited scholarly attention. This paper focuses on the disputes between Buglio and Schall, analyzing how Matteo Ricci's Strategy was investigated during that time.

**Keywords:** Matteo Ricci's Strategy; Ludovico Buglio; Adam Schall; disputes



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## 1. Introduction

"From now on, if you do not follow Matteo Ricci's rules, you will not be allowed to live in China and will be expelled. If the Pope forbids you to preach for this reason, then, as you are monks, you may just live and cultivate the way in China. If the Pope still blames you for following Matteo Ricci and not obeying his words, and orders you to go back to the West, I will not let you return." (.....从今以后，若不遵利玛窦的规矩，断不准在中国住，逼逐回去。若教化王因此不准尔等传教，尔等既是出家人，就在中国住着修道。教化王若再怪你们遵利玛窦，不依教化王的话，教你们回西洋去，朕不教你们回去.....) ([Shanghai Shidian Chubanshe Bian 2010](#))

On 4 December 1705, Maillard de Tournon (1668–1710), the envoy representing Pope Clement XI (1649–1721), reached Beijing with the Papal decree that prohibited certain Chinese rituals, including offering of sacrifices to Confucius and the ancestors, as well as the use of Chinese terms *Tian* (天) and *Shangdi* (上帝) to refer to the Christian God. Emperor Kangxi welcomed him with great hospitality at first. However, upon discovering Tournon's true intentions, Kangxi promptly instructed him to leave Beijing. On 25 January 1707, Tournon publicly declared the prohibition in Nanjing. Kangxi, in response to this, expelled missionaries who did not respect Chinese customs and rituals while allowing those who respected to continue residing in China. On 19 April 1707, Kangxi issued the above

decree to elaborate on the meaning of “respecting Chinese customs and rituals” by directly referencing “Matteo Ricci’s Rules” (利玛窦规矩) in Suzhou (Chen 1974, pp. 13–14).<sup>1</sup>

Emperor Kangxi considered Ricci’s Strategy as a crucial criterion for assessing the compatibility of Catholicism with Chinese cultural and political traditions. Furthermore, he recognized it as a vital factor in the integration of diverse cultures into Chinese society. The decree bestowed a significant level of authority on Ricci’s Strategy in China. However, among Western missionaries, this strategy not only exceeded the traditional missionary policy but also sparked some debates among them, which have been extensively studied in the existing literature. In this paper, after reviewing the formation of Ricci’s Strategy, the author focuses on the prolonged disputes between Ludovico Buglio and Adam Schall, two missionaries stationed in Beijing during the mid-17th century, to rethink Ricci’s Strategy.

## 2. The Formation of Matteo Ricci’s Missionary Strategy

Unlike other Catholic orders, the Society of Jesus was regarded as the reformist faction of Catholicism since its establishment. The founder of the society, Ignacio de Loyola (1491–1556), crafted a novel spirituality rooted in his personal experiences and reflections, which he articulated in his renowned work, the *Exercitia Spiritualia*. Loyola, apart from emphasizing absolute obedience, also expected the Jesuits to propagate the Gospel through personal engagement, thereby allowing the Society to adopt a more adaptable approach to missionary work (Hartmann 2003, p. 19). Following Loyola, the Jesuits embarked on missionary journeys across the globe, guided by their motto “Ad Majorem Dei Gloriam” (For the Greater Glory of God). In order to effectively preach, they recognized the need to adapt the teachings of Christianity and its moral norms to the cultural and social contexts of the people they encountered (Prieto 2017). Loyola believed in the potential of personal activities to shape theological and anthropological assumptions. Accommodationism, initially rooted in humanistic and classical rhetoric, became associated with this idea (O’Malley 1993, p. 255). However, there were differing opinions on how to put accommodationism into practice in missionary work, both within and outside the Society of Jesus, leading to debates and varying approaches in the missionary field.

In Asia, Jesuit Roberto de Nobili (1577–1656) adapted the local customs and learned the local language to effectively convey Christian doctrine in India. Similarly, Francis Xavier (1506–1552) employed natives as his assistants, relying on their linguistic skills to translate and interpret Christian teachings firstly in India and then in Japan (Kishino 1998, p. 255). When the Jesuit Visitor for Asia, Alessandro Valignano (1539–1606), visited Japan in 1579, he not only inherited but also enhanced Xavier’s accommodation strategy. Valignano stressed the importance of the local language in the missionary process. This emphasized the need for missionaries to actively study and adapt to the local culture. Additionally, Valignano actively nurtured native clergy to establish a stronger connection between the priests and the local people. This facilitated effective communication between Catholicism and the local culture, making the message of the Gospel more accessible and relatable (Qi 2003, p. 34). Furthermore, both Xavier and Valignano recognized the potential of Western knowledge of natural sciences in aiding missionary work in the East. As a result, they set requirements for the Jesuits to acquire scientific knowledge, enabling them to engage with local communities and build credibility through their understanding of the natural world (Qi 2003, p. 245). Besides, Valignano resided in Macau for 10 months, deepening his understanding of China. He believed that the Chinese people would not naturally conform to Catholicism, but rather that Catholicism should actively adapt to the Chinese context. Building on his experiences in Japan, Valignano placed even greater emphasis on the importance of linguistic proficiency in the Chinese language for missionaries.

Following Valignano’s principle, Michele Ruggieri (1543–1607) was sent to Macau to study Mandarin (官话) in 1579, who later made significant contributions to Ricci’s Strategy. Ruggieri translated Confucian classics such as the “Four Books and Five Classics (四书五经)” and *Ming Xin Bao Jian* (《明心宝鉴》),<sup>2</sup> in which he sought natural reasons to provide legitimacy and feasibility for the missionary work. He also wrote the Chinese catechism book

“*Tian Zhu Shi Lu*” (《天主实录》 1584), which introduced Western theological terms into the Chinese context with a methodological attempt to foster cultural exchange between China and the West.<sup>3</sup> Drawing upon the foundation laid by his predecessors, Matteo Ricci arrived in the mainland of China in 1583, and further enriched the methodology and improved the accommodation strategy in China, focusing on the three following aspects.

(1) Jesuits strategically employed science and technology as a means to attract the Chinese people. On their arrival in China, missionaries usually used maps and gadgets such as clocks and prisms to arouse the curiosity of local officials and literati, thus developing initial relationships with them. Yu Yonghe (郁永河), one Chinese scholar, once said “Their analysis is extremely subtle. They do their best to master the knowledge from astronomical observation as well as small machinery” (析理务极精微，推测象纬历数，下逮器用小物，莫不尽其奇奥) (Xu 1998, vol. 9, p. 322). During the process, Western science and technology were gradually introduced into China. The Jesuits, with their systematic academic training in various local schools and the Collegium Romanum (The Roman College), possessed expertise not only in theology and rhetoric, but also in humanistic subjects such as physics, astronomy, and geography. Leveraging the power of science and technology, the Jesuits established themselves as “Western scholars” (西儒), which greatly facilitated their missionary work in spreading the gospel. Moreover, the introduction of science and technology also satisfied the needs of Chinese intellectuals to enrich Chinese culture in the Late Ming period. At that time, Wang Yangming’s School of Minds (心学) was highly respected. Thus, Neo-Confucianism (理学) was challenged by the practical spirit of “studying things to acquire knowledge” (格物致知). Under these circumstances, Chinese intellectuals began reflecting on traditional Confucianism and looked outside of their country for new thoughts. Chinese intellectuals preferred to expand the boundaries and reconstruct the content of Chinese traditional culture rather than merely introducing something new. As a result, science and technology, in subjects such as astronomy, physics, zoology, and mathematics, brought by the Western missionaries played essential roles. Due to their practical nature, science and technology complemented the missing components of Chinese culture and seemed to be one new way of “pursuing knowledge” (尚文). It is reasonable to assert that this content was contributed to and developed mutually by both the East and the West.

(2) Jesuits actively established connections with the upper class to advance their missionary efforts. In their competition with Protestantism for congregations in Europe, they especially targeted the upper classes (Hartmann 2003, pp. 23–24). They built schools and cultivated highly educated individuals, exemplifying their approach. Upon their arrival in China, Ruggieri and Ricci maintained their relationship with the upper class, harboring the hope that one day the Chinese emperor could be converted. During their communication with Chinese officials and literati, the concept of “supplementing Confucianism and discarding Buddhism” (补儒易佛) gradually gained cultural consensus.

The Jesuits’ deep knowledge of Chinese classical texts and Western learning established their reputation as “Western scholars” among the Chinese population, opening doors for them to engage with the upper echelons of Chinese society. In Ricci’s letters, he emphasized his interactions and connections with literati and scholars, highlighting the value and influence of converting intellectuals over a common individual.<sup>4</sup> The Jesuits prioritized their relationships with Chinese literati and officials because they recognized the practical support and assistance they could provide. Being influential figures within Chinese cultural and social systems, these individuals played a vital role in facilitating communication between Catholicism and Confucianism, as well as between the general population and the emperor. Thus, Ricci entered and stayed in Beijing with the help of Liu Xintong (刘心同), Zhong Wanlu (钟万禄), etc., while Adam Schall was introduced to Qin Tian Jian (钦天监) by Xu Guangqi (徐光启). These relationships with the upper class proved beneficial for the Jesuits, especially during the uncertain times before the Ming Dynasty’s impending collapse. Consequently, Schall quickly aligned himself with the Manchu regime, while Michel Boym (1612–1659) found himself working with the Yongli court (永历), and Buglio served the Daxi court (大西), effectively allowing the Jesuits to rebuild their social networks.

(3) Jesuits devoted considerable efforts to writing numerous books as a means to spread evangelism. Chinese society held books in high regard, as reflected in the proverb “in books, you can find golden houses” (书中自有黄金屋). Furthermore, the diverse array of Chinese dialects made the dissemination of religious teachings through books more efficient, widespread, and effective than relying solely on oral preaching. Furthermore, the advancement of woodblock printing technology in the late Ming Dynasty played a crucial role in facilitating fast and cost-effective printing and publishing of books. As a result, the Jesuits in China went beyond merely understanding and speaking Chinese. They translated Chinese Classics into Western language, and also created works in Chinese that encompassed Western learning, known as Xixue Hanji (西学汉籍). On the one hand, the Jesuits sought support from Europe for missionary work, while, on the other hand, they aimed to explore potential missionary possibilities from Chinese authorities. The writings that emerged from this communication served as a direct vehicle for cultural interaction between the East and the West, leaving a profound influence on Chinese society during that time. Approximately 500 books of this kind were published between 1582 and 1796, and they remained popular within Chinese intellectual circles. According to the content, these publications could be classified into two categories: books on Western science and technology and books on Western religion. The former emerged as a natural outcome of the efforts to evangelize through science and technology, usually produced by the Jesuits in collaboration with Chinese literati. The Jesuits either wrote (撰) or dictated (口述), while Chinese literati either recorded (笔受) or added prefaces and postscripts (序跋).<sup>5</sup> The latter primarily featured the true intentions of the Jesuits, which caught more attention from the Church. Many phrases, such as “Revised by (订正)” and “Approved by (核准)” were often displayed on the title pages, indicating the involvement of the Church. However, these publications noticeably lacked the participation of Chinese literati, compared with technological writings, suggesting that Chinese literati had less interest or even doubts regarding Catholic doctrine. For instance, Zhang Erqi (张尔岐), a literati in the Late Ming, once commented that “we should learn Westerner’s astronomy, mechanics, and mathematics because they are experts in these areas while remaining steadfast in our own doctrines” (历象器算，是其所长，君子固当节取。若论道术，吾自守吾家法耳) (Fang 1995, p. 33). To be specific, there were more technical books in the late Ming, the number of which decreased with the increase in theological books in the early Qing period. This change reflected a shift in focus from technical knowledge to religious teachings during that period.

After the summaries of the above three elements of Ricci’s Strategy, it is important to highlight that Ricci’s Strategy was not developed overnight. Instead, it was the culmination of continuous conceptualization and practice by the early Jesuits in China, taking into account the traditions of the Society of Jesus and the specific circumstances of China during that time. The strategy was the result of collective wisdom and was not rigid. Instead, it constantly evolved and adapted in response to the ongoing process of missionary development.

For instance, Longobardo’s missionary method was more direct and primarily targeted towards the common people, compared to Matteo Ricci’s. He began to preach proactively in the rural areas surrounding Shaozhou in 1599, using catechisms to explain religious intention directly (Brockey 2008, p. 293). Although this method, commonly referred to as “mind hunting” (Ricci 1911–1913, vol. 2, p. 475), might have caused some trouble, it proved to be an effective means of gaining converts directly and quickly. Ricci also approved of this preaching method, as he found himself burdened with responsibilities and unable to spare time for missionary work. However, it was important to acknowledge that Ricci also expressed criticism towards Longobardo’s method, especially in cases where vague strategies lacking clear missionary logic and practical experience were employed (Chai 2015, p. 121). Ricci expected to coordinate and balance the two approaches, hoping to effectively address practical challenges encountered during missionary work.

Additionally, Ricci’s supplementing of Confucianism (补儒) referred to deconstructing Catholic theological terms within the Chinese cultural system and integrating them

into the Confucian context. He once adopted Ruggieri's translation, translating "deus" into Chinese as "天主" (Tianzhu), but he also further referred "天主" (Tianzhu) as "上帝" (Shangdi), asserting that "my Tianzhu is the same as the Shangdi mentioned in ancient scriptures" (吾天主，乃古经书所称上帝也). This approach was welcomed by the Chinese, but opposed by some Jesuits. Ruggieri considered that it would mix the true meaning of the Western God with the Chinese concept of Shangdi. In a letter written by João Rodrigues (1561–1633) to Claudio Aquaviva (1543–1615) in 1616, he also mentioned, "The term Shangdi does not refer to an almighty Lord but rather to a deity well-known among the Chinese" (Brockey 2008, p. 62). Similarly, Longobardo criticized this interpretation, stating, "After reading the *Four Books of Confucius*, I realized that the term Shangdi has different interpretations that do not align with the sacredness of nature." (Fernandez Navarete 1676, pp. 246–47) To ensure theological purity, Longobardo thus supported the banning of translations such as "天主" (Tianzhu), "上帝" (Shangdi), and "天神" (Tianshen), instead suggesting the use of transliterations like the Japanese Church. In 1628, some Jesuits in China held a meeting in Jiading (now the Jiading district of Shanghai) to resolve the internal debates. André Palmeiro (1569–1635), who occupied the office of visitor at that time, advocated ceasing all discussions and retaining the term Tianzhu while discarding Tian and Shangdi. Recognizing that the final decision should be made in Rome, he wrote to Rome and urged Superior General Mutio Vitelleschi (1563–1645) to officially respond (Brockey 2014, p. 275). However, these adjustments and reflections on Ricci's Strategy, whether made by officials or individuals, should not be taken as a repudiation. Instead, they represented an exploration of alternative possibilities that could enhance and broaden the scope of the strategy.

### 3. The Disputes between Buglio and Schall over Ricci's Strategy

In the mid-17th century, as Chinese society experienced dynastic changes, Jesuits in China were once again confronted with the need for further adaptations in their missionary strategy. Consequently, a dispute broke out within the Jesuits' community in Beijing. The two sides of the dispute were led by Ludovico Buglio and Adam Schall. This protracted dispute involved many missionaries and generated a significant amount of literature. The disputes were treated in a secretive way within the Church for a long time, only coming to light in recent years as scholars from various perspectives have studied them.<sup>6</sup> Most scholars believe that, initially, this dispute seemed like a personal feud between Buglio, Gabriel de Magalhães (1610–1677), and Schall, or even an accusation against Schall by Buglio and Magalhães. However, it was intimately connected to the implementation of Ricci's Strategy under the new regime. This dispute involved not only the superstitious elements in astronomy and the new identities of Jesuits, but also the inculcation of Catholicism within Chinese society. These aspects are explained in detail in the following discussion.

#### (1) Superstition or tradition?

In 1630, Schall was appointed to collaborate with Johann Schreck (1576–1630) and Giacomo Rho (1593–1638) to compile *Chong Zhen Li Shu* (《崇祯历书》) at the Qin Tian Jian, which was responsible for calendar compilations and astronomical observations, as introduced by Schall. However, they had not finished the work until the Manchus passed Shanhaiguan (山海关) and occupied Beijing. Schall presented the *Chong Zhen Li Shu* to the new ruler and was permitted to continue the work.<sup>7</sup> Emperor Shunzhi recognized the significance of the new calendar in asserting his regime's orthodoxy (正朔) and appointed Schall to assume the position of Qin Tian Jian in 1644. The official responsibilities of this position mainly included observing astronomy, determining calendar calculations, fortune-telling, and predicting celestial events such as solar and lunar eclipses, meteorological phenomena, and atmospheric conditions. In addition to their primary responsibilities, Qin Tian Jian was also responsible for monitoring and promptly reporting any changes.<sup>8</sup> This role involved various superstitious elements, including overseeing "thirty kinds of imperial calendar notes, thirty-two kinds of common calendar notes, and seventy-

two kinds of other calendars notes” (御历注三十事，民历三十二事，壬遁历七十二事). Furthermore, they were tasked with “selecting auspicious year, month, day, time, and direction for activities such as construction, military campaigns, weddings, and funerals” (营建, 征讨, 冠婚, 山陵之事, 奉旨选择年, 月, 日, 时, 方位进呈),<sup>9</sup> which sparked numerous controversies within the Society. Buglio and Magalhães wrote a joint letter (Archivum Romanum Societatis Iesu, numbered Jap-Sin 199 II) to the Church from 1649, criticizing the superstitious activities in Qin Tian Jian as incompatible with the Christian faith. They also accused Schall of violating his oaths.

When discussing this argument, it is important to consider the astronomy culture in the West and China. First of all, it is worth noting that the blending of astronomy and astrology was observed in both cultures. In China, the term “天文” (tian wen) was commonly used to refer to “astronomy”. This term first appeared in the *Book of Changes* (《易经》) with the phrase “Observe astronomical phenomena to understand changes in time, observe human affairs to harmonize the world” (观乎天文, 以察时变, 观乎人文, 以化成天下). From this, we could understand that Chinese astronomy shared certain characteristics with astrology, particularly when it was combined with the Confucian concept of “the interaction between heaven and humanity” (天人感应). It became a tool for Chinese emperors to comprehend the will of heaven, to govern themselves, and to rule the country. This was a form of judicial astrology that incorporated the politicization of the Confucian ideology of “fear of heaven” (畏天). Accordingly, 历法 (li fa), similar to astronomy (天文), referred to observing and explaining astronomical phenomena, including 历数 (li shu) which referred to calculating the year and time from eclipse and stella positions, etc., and 历理 (li li), which referred to the principle of the astronomy. The Tang Dynasty onwards, possibly influenced from the Indian system of the Seven Celestial Stellas (七曜日) and Buddhist scriptures, saw the prevalence of a calendar named “具注历” (ju zhu li). This calendar combined specific annotations regarding auspiciousness or inauspiciousness (Jiang 2004, pp. 185–87). Consequently, in addition to the annual publication of calendars predicting celestial phenomena, such as the “七政躔度历” (qi zheng chan du li) and “凌犯历” (ling fan li), the state also issued specialized calendars with annotations for different individuals to serve in their everyday lives, national events and political activities.<sup>10</sup> In Europe, the blending of astronomy and astrology was common among intellectual circles, including theologians and astronomers. Prominent figures such as Thomas Aquinas (1225–1274), Tycho Brahe (1546–1601), and Kepler (1571–1630) were known to support astrology. During the 16th century, the almanac gained popularity in Europe, as it was filled with predictions of auspicious and inauspicious events. However, it was not until 1586 that Pope Sixtus V (1521–1590) issued decrees that opposed astrology with exceptions for specific cases such as astrometeorology and astrological medicine, which were still considered acceptable (Lippiello 1997, pp. 39–59).

In this context, let us explore the Jesuits’ attitude towards Chinese astronomy. Ricci first observed that the Chinese were more concerned with celestial phenomena. They believed that events occurring on Earth were influenced by the stars in the sky (Ricci 2017, p. 22). Giulio Aleni (1582–1649) similarly expressed views that mathematics was primarily utilized for compiling calendars, rather than predicting prosperity or calamity, which was decided by God. In his observations, using astronomical phenomena to foresee the safety or danger of a nation was considered improper in his own country, as the practice was thought to confuse and disrupt the will of the people without benefiting any moral or social benefits. Consequently, such practices were prohibited by law.<sup>11</sup> Xu Guangqi shared a similar idea, and he emphasized that the calendar was employed to serve people’s daily life.<sup>12</sup> Obviously, the scientific nature of astronomy introduced by Jesuits satisfied the pursuit of “practical learning” (实学) by Chinese literati and intellectuals since they did not seek ultimate metaphysical justifications based on ethics and morality, but rather aimed to benefit the country and the people.

Schall, like his predecessors, shared similar views on Chinese astronomy and the calendar. On the one hand, he made a distinction between astronomy and the calendar.<sup>13</sup>

On the other hand, he, along with Giacomo Rho, introduced Western astrometeorology to China by writing the book *Tian Wen Shi Yong* (《天文实用》). Despite their efforts, Schall and his colleagues were not entirely successful in introducing Western approaches to Chinese astronomy. Schall eventually had to compromise, like Li Tianjing (李天经), by following traditional methods regarding auspicious and inauspicious celestial signs and lunar regulations.<sup>14</sup> In response to criticism, Schall even compiled a work named *Min Li Bu Zhu Jie Huo* (《民历补注解惑》), seeking to redefine the nature of the superstitious annotations in the calendar as part of Chinese traditional customs because they could serve as a way to teach people to align with the ways of heaven and earth.<sup>15</sup> In this way, Schall attempted to reframe these annotations as behavior rules in order to downplay their “superstitious” nature (Huang 1997, p. 203). It was not until 1664 that the Church began to view the seemingly superstitious and subsidiary parts of the calendar as neutral knowledge. Pope Alexander VII (1599–1667), concerned about the interests of the Church in China, issued a decree allowing missionaries to assume the position of Qin Tian Jian.

In this debate, Schall followed Ricci’s Strategy of compromise and accommodation when confronted with conflicts between Chinese and Western cultures. However, his approach was met with criticism and deemed improper within the Church and the Qing court. The content of the Chinese calendar could be divided into two parts. The first part mainly included the intercalation of the solar and lunar calendars, the calculation of eclipses, the observation of lunar phases, and the determination of solar terms and the seven stellar positions (交食经纬晦朔弦望, 及节气七政), which was related to *li shu* (历数). The other part focused on the auspicious and inauspicious celestial influences during the lunar month (神煞宜忌月令诸款), which was related to *li li* (历理). The former part was the primary concern of the emperors, as it was closely connected to the political power. However, due to Schall’s insufficient understanding of Chinese astronomy tradition, he mistakenly annotated “according to the Western astronomy” (依西洋历法) on the former part. Although his intention was to address the superstition problem in the latter part, this action triggered opposition from Yang Guangxian (杨光先), which ultimately caused the Calendar Case.

## (2) “Western courtier” or “Official courtier”?

In Europe, Jesuits were often appointed as confessors of the kings, and in this role, they would provide both religious and political advice to the courts. However, within the Society, there were discussions about whether this practice went against the Jesuits’ rules. In 1602, Claudio Acquaviva (1543–1615) released *de Confessariis Principum* to authorize Jesuits to serve as confessors, but with certain restrictions. According to the document, they were not allowed to freely engage in academic and political affairs (Hartmann 2003, p. 34). When Ricci interacted with literati and officials in China, he chose not to use “Western monk” (西僧), which had been borrowed from Japan by Ruggieri. Instead, Ricci started referring to himself as “Western people (西人)” or “Western scholar (西儒)”. This decision was a part of Ricci’s early strategic approach, aimed at gaining popularity among the Chinese intellectuals. In 1600, when Ricci paid tribute to Emperor Chongzhen, he started using the term “affiliated courtier” (陪臣)<sup>16</sup> to describe himself. This concept originated from the Zhou Dynasty and referred to the ministers of the feudal princes.<sup>17</sup> Subsequently, many Jesuits adopted this phrase to signify their identities when communicating with Chinese authorities. Schall and Giacomo Rho also referred to themselves as “affiliated courtiers” while serving Emperor Chongzhen. Additionally, similar concepts like “distant courtier” (远臣) and “Western courtier” (西臣) were also employed at that time.<sup>18</sup>

The construction of these new identity concepts played a crucial role for the Jesuits in adapting to the Chinese tributary system (朝贡体系), as it enabled them to strike a balance between maintaining a certain distance from the Chinese political system while remaining loyal to the Pope. Buglio, in agreement with this approach, also referred to himself as a “Western courtier” in his work, *Yu Lan Xi Fang Yao Ji* (《御览西方要纪》). Initially, Schall was referred to as an “affiliated courtier” by the Manchu.<sup>19</sup> However, after assuming control over Qin Tian Jian, while he continued to identify himself as a “Western courtier,”

his identity became intertwined with official titles such as *Teacher who masters metaphysics* (通玄教师), *Minister of Taichang Temple* (太常寺卿), *Official Minister of Qin Tian Jian Supervisor* (管钦天监监正事臣), *Tongzheng Envoy of Tongzheng Si* (通政使司衙门通政使), *Glorious grand master* (光禄大夫), and more.<sup>20</sup> These titles reflected that Schall had been deeply involved in the political system, and eventually assumed the role of an official courtier of the Qing Dynasty.

It thus became easier to understand why incidents such as Schall's "adopted son" and "ennoblement of past three generations" granted by the Chinese emperor emerged one after another, eventually leading to disputes within the Society. While the ennoblement of the past three generations was regarded as a prestigious honor for Chinese officials, it did not hold the same significance for the Jesuits, whose primary focus was on the greater glory of God (*Ad Majorem Dei Gloriam*). Furthermore, Emperor Shunzhi convinced Schall to adopt a child to serve him and share in his honors,<sup>21</sup> showcasing his lack of understanding of the missionary's true identity. Schall's adoption of Pan Shihong (潘世宏) (later known as Tang Shihong) was a form of "inheritance by favors" (爱继) protected by Chinese law (Lv 2008, pp. 89–93). However, it was deemed unacceptable to the Jesuits, both in terms of religious discipline and their mission's development in China. Therefore, the change in identity titles was no longer about blending politics with religion, but rather about subduing religion through politics. While Catholicism enjoyed privileged status among the upper class, this approach, in the case of Schall, brought confusion to the Jesuits' sense of identity. It was no wonder, then, that Chen Yuan (陈垣) commented on the situation, stating, "It had never been heard of such rewards being bestowed upon monks, but they were rewarded to Western priests. Clearly, they did not understand the spirit of the Church and did not treat Adam Schall as a priest" (Chen 1980, p. 503). Actually, the emperor was well aware of Schall's missionary identity and the rules associated with it.<sup>22</sup> However, he seemed unconcerned because, once Schall accepted the position of Qin Tian Jian, it appeared that the emperor had successfully integrated these foreigners into the Chinese system of rites and law. In addition to his astronomical pursuits, Schall also became involved in numerous political and diplomatic affairs.<sup>23</sup> Buglio and others felt Schall had gone beyond Ricci's Strategy. They believed that accepting a secular official position was a serious violation of Jesuit rules and a sign of an insatiable appetite for worldly affairs. Moreover, considering the unpredictable nature of the emperor's interest and his potential to change, Schall's position was not secure. Once the environment shifted unfavorably, it could even hinder normal missionary activities. Such concerns were understandable, as demonstrated by the experiences of Buglio and Magalhães while serving Zhang Xianzhong (张献忠) in Sichuan. They were initially ennobled as "National Masters of Astrology" (天学国师), but were subsequently thrown into prison simply because Zhang Xianzhong was dissatisfied with the celestial instruments they had produced.

It is evident that, in the 17th century, as Jesuit missionaries faced changing circumstances, their identities underwent a transformation, dividing them into two categories: "Western courtiers" or "official courtiers." The formation of these two identities depended on the individuals with whom the Jesuits interacted. When the emperor bestowed official titles upon Jesuits, they gradually distanced themselves from the literati network and became integrated into the royal network. This transition shifted the emphasis of their cultural attributes towards political attributes, eventually leading to a division within the Jesuit community. The phenomenon exemplified the Chinese tradition of blurring boundaries between literati and officials in Ricci's Strategy. It also underscored the conflict between Catholicism and Chinese culture. In fact, from Kangxi's decree discussed at the beginning, it could be inferred that "Ricci's Strategy" served not only as a means for Jesuits to enter China, but also as a tool employed by the emperor to regulate the Jesuits, with the hope of gradually integrating the Catholic Church into Chinese society.

### (3) Accommodation or inculturation?

Both Buglio and Schall were dedicated to writing or translating Western learning into Chinese. Buglio had published 23 books, while Schall had published 11. However, if we compare their works, we can find some interesting differences and divergences. Firstly, they translated and wrote books in Chinese during different periods. The first book written by Schall in Chinese was *Yuan Jing Shuo* (《远镜说》) in 1626, and the last book was *Min Li Pu Zhu Jie Huo* (《民历铺注解惑》) in 1662. Most of Schall's works were written before 1645. On the other hand, Buglio primarily worked from the 1640s to the 1670s, when he was brought to Beijing by Prince Hao Ge (豪格) from Sichuan to live and preach. The difference in periods was certainly influenced by their ages, but it also suggested a shift in their focus. Actually, after 1644, Schall was immersed in Qin Tian Jian, while Buglio focused more on daily missionary activities in Beijing, primarily based at "Dongtang" (东堂). Buglio actively distributed teaching books, holy images, and embroidered bags to the congregation and also established four monthly gatherings for preaching. According to Louis Pfister's statistics, approximately 500 people were baptized in Beijing in 1663, with an additional 1000 people in nearby places (Pfister 1995, p. 253).

Secondly, Schall and Buglio had different preferences when it came to composing books. Schall wrote five books on religion, focusing on core topics of Catholicism. He also authored five books on science and technology, covering subjects such as optics, astronomy and gunpowder making, among others. One of his most renowned works, "*Chong Zhen Li Shu*", consisted of an impressive 137 volumes and introduced Western astronomical theories and methods, including those of Ptolemy, Copernicus, and Tycho. In comparison, Buglio composed 15 books on religion and 4 books on science and technology. Among them, *Chao Xing Xue Yao* (《超性学要》) consisted of 28 volumes, which was a significant theological work translating Thomas Aquinas' *Summa Theologiae* into Chinese. Other works such as *Yu Lan Xi Fang Yao Ji* (《御览西方要记》), *Ying Lun* (《鹰论》), and *Shi Zi Shuo* (《狮子说》) discussed Western geography as well as zoology. Unlike Schall, Buglio's books of religions mostly focused on introducing the doctrine and liturgy of Catholicism, including works such as *Sheng Shi Li Dian* (《圣事礼典》) and *Shan Zhong Yi Ying Li Dian* (《善终瘗葬礼典》).

Thirdly, the books of Schall and Buglio targeted different readers. While both authors wrote books on science and technology for the emperor, their religious books had distinct audiences. Schall's *Chong Yi Tang Ri Ji Sui Bi* (《崇一堂日记随笔》), *Jin Cheng Shu Xiang* (《进呈书像》), and *Zhu Jiao Yuan Qi* (《主教缘起》) were intended for intellectuals and the emperor. Schall aimed to directly preach by introducing doctrines and theology rooted in Chinese culture (Xiao 2017, pp. 131–50). Conversely, Buglio's religious books catered to the local population. Drawing from extensive preaching practices, Buglio noticed issues such as unclear doctrines and a shortage of local clergy in these activities. To tackle these problems, he sought to advance the development of Catholicism in China by introducing clear doctrines and proper liturgy, as well as by cultivating local clergies. Buglio translated *Missale Romanum* as *Mi Sa Jing Dian* (《弥撒经典》), in which he provided detailed descriptions of the preparations for the mass, the specific implementation process, and the scriptures to be recited. The book was aimed at educated converts and Chinese priests who already had a fundamental understanding of theology.

The differences between Schall and Buglio were partially attributed to their academic capacities and preferences, but the primary reason was their attitudes towards Ricci's Strategy. To be more precise, Schall advocated preaching through science and technology, providing vital protection for the Catholic career in China, with the hope of it eventually gaining legitimacy. His approach aligned with accommodation, a key feature in Ricci's Strategy, which focused on adapting to and becoming familiar with the local way of life, including clothing, residence, food, and more. Rather than rushing to promote their own culture, their sole purpose was to be accepted and integrated into the local culture more effectively (Standaert 1993, p. 32). However, Buglio observed that, despite writing numerous works aimed at the Chinese people or explaining Catholic theology, the literati

and officials showed a greater interest in Western science and technology, displaying little enthusiasm for the religious and philosophical aspects. For instance, when Lu Longqi (陆陇其), a famous scholar at that time, visited the Catholic Church in Beijing in 1675, Buglio excitedly presented his work *Chao Xing Xue Yao* to him. Sadly, Lu showed little interest and even regarded “the accounts of Adam, Eve, and the birth of Jesus as unreliable” (西人之不可信，特亚当，厄袜及耶稣降生之说耳) (Lu 2016, p. 62). Therefore, Buglio adjusted the missionary method, choosing to accelerate the process of inculturation, rather than accommodating slowly. In fact, “inculturation” differed from “accommodation.” The former meant integrating and absorbing new elements from another culture as part of its own, while the latter was just one part or the beginning of the broader process of “inculturation”. During the missionary process, accommodation served as the means, while inculturation was the ultimate objective. According to Buglio, a commitment to the fundamental doctrines and rules of Catholicism and Society was the prerequisite for implementing accommodation. Therefore, missionaries should educate the Chinese with pure doctrines and simultaneously cultivate local clergy to consolidate the development of Catholicism. Buglio endeavored to restore the decree issued by Pope Paul V in 1615, which aimed to cultivate native clergy in China and translate the Mass and liturgical texts. The cover page of his *Mi Sa Jing Dian* thus bore the inscription “Missale Romanum, auctoritate Pauli V. Pont. M Sinice redditum a P. Ludovicus Buglio Soc. Iesu, Pekim. In Collegio eiusd. Soc. An. M. DC. LXX”. However, this did not imply that Buglio had abandoned accommodation in the pursuit of inculturation. In his translation of the *Mi Sa Jing Dian*, Buglio not only employed the elegant and fluent style of the literati’s language, but also frequently integrated the content into the Chinese cultural context. For instance, when organizing the feast day calendar, he directly incorporated Western religious holidays into the Chinese lunar calendar system. Therefore, one might come across expressions like “On the first day of the first lunar month, we celebrate the Holy Name of Jesus” (正月初一，立耶稣圣名). However, it was unfortunate that *Mi Sa Jing Dian* did not meet his expectation in China and was eventually banned by the church (Law 1999, pp. 40–43).

#### 4. Conclusions

Ricci’s Strategy was shaped by the tradition of the Society of Jesus and the practical experiences of Jesuits during their arrival in China in the late Ming dynasty. The essence of Ricci’s Strategy lay in its flexible adaptation, which required timely adjustments and supplements based on the prevailing social and cultural conditions in China, as well as within the Church. From this perspective, it could be argued that there was inevitability in the disputes between Buglio and Schall.

On the one hand, the new developments in the Church during the early Qing period provided new opportunities for Catholic inculturation. With the fall of the Ming Dynasty and the frequency of natural or man-made disasters, the Manchu and other insurgent powers began to overturn or modify the incumbent Confucian tradition system in China. Consequently, intellectuals were disillusioned with the old system, while ordinary people focused primarily on subsistence and peace. In this context, the Jesuits succeeded in preaching amongst the common people rather than the upper classes during the wars. According to the annual reports sent by the Jesuits to Rome, it can be inferred that the places where converts increased the most were primarily those that suffered the most during the transition of the Ming to Qing Dynasty, as new converts were mainly from the civilian population. However, thanks to the short-term protection of the emperor and the missionary endeavors of Jesuit predecessors, Catholicism made significant progress during the early Qing Dynasty. With the increase in baptisms among the middle and lower classes, Catholic communities shifted from cities to villages, resulting in the emergence of a new organizational structure. Given the limited number of priests in such a vast suburban area, missionaries began to fully utilize the influence of clans in the traditional Chinese social system. They established numerous “holy convocations” to manage converts, which marked another milestone in the evolution of Ricci’s Strategy. This approach facilitated the rapid

spread of doctrines and led to the formation of many Catholic family groups characterized by inter-generational inheritance.<sup>24</sup> Once the missionaries were expelled, these Catholic groups could provide flexible and covert assistance to the church. As the demand for missionaries to lead and support these groups increased, it became necessary to train local clergy and promote the inculturation of the Catholic Church, since they could provide a more effective approach to addressing the new challenges that arose with the development of the Catholic community in rural and remote areas.

On the other hand, the new characteristics of politics and culture in the early Qing period required the Jesuits to build new identities. In addition to the new characteristics emerging in local missionary work, there were also new challenges in the upper class, where the Jesuits were heavily involved. Specifically, the distinction between the Han and Manchu nationalities had a profound impact on the preaching strategies of Schall and Buglio. They had to navigate and adapt their approaches in accordance with the cultural sensitivities and expectations of both Han Chinese and Manchu communities. As the Ming Dynasty collapsed and the Qing Dynasty was established, Chinese intellectuals began to reflect on the reasons for the political failure of the Ming. This led them to abandon Yangming's philosophy and embrace pragmatism, opting for a modest way of life instead of attending lectures and associations (Wang 2004, p. 231). Naturally, the intellectuals gradually displayed less interest in engaging with the Jesuits, even becoming absent from religious matters. Taking the Nanjing and Fujian Cases as examples, there were once many intellectuals, such as Xu Guangqi (徐光启), Yang Tingyun (杨廷筠), and Zhang Ruitu (张瑞图), who defended the Catholic Church. However, in the Calendar Case, only the missionaries wrote books to defend themselves, though there were a few literati and officials, such as Li Zubai (李祖白) and Tong Guoqi (佟国器), who had limited secular power and religious influence. In contrast, the rulers of the Qing Dynasty began to display enthusiasm for the Jesuits. On the one hand, the Jesuits needed political protection from the emperor, while, on the other hand, the emperor sought support from the Jesuits, especially in the realm of Western science and technology. Similar to the Manchu, the Jesuits were also perceived as "the others" in comparison to the Han Chinese. During the early Qing period, the Jesuits made efforts to assimilate Han culture while preserving their own national identity. As a result, they were highly valued as perfect tools to maintain a balance with Han culture. The Jesuits' knowledge of Western astronomy and their appointment as foreign officials helped to curb the influence of Han culture and officials. With the successful integration of Han and Manchu cultures, Jesuits and Catholicism gradually faced marginalization in the court later on.<sup>25</sup>

In summary, the paper brings attention to the long-overlooked disputes that emphasize the differing interpretations of the applicability of Ricci's Strategy in new missionary circumstances. These disputes shed light on the varying viewpoints regarding the scope and extent to which Ricci's Strategy should be implemented. The disagreements between Buglio and Schall, such as how to navigate the delicate balance between superstition and tradition, how to interpret the role of Jesuits in the Chinese context, and even how to further the inculturation of Catholicism, underscore the divergent viewpoints when Catholic culture clashed with Chinese Confucian tradition, particularly concerning core matters. These disagreements showed the distinct voices of both Chinese intellectuals and the Jesuits in addressing these challenges. By enhancing research on these contrasting viewpoints, we not only enrich our understanding of Ricci's Strategy within church history, but also uncover fresh materials and perspectives for fostering cultural exchanges between China and the West. We gain valuable insights into the dynamics of cross-cultural interactions and the challenges that emerge during these exchanges.

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## Notes

- 1 The missionaries who wanted to stay in China should get one certificate from the government, which wrote: “A certain person from a Western country, aged a certain number of years, joined a certain order and came to China for several years, never returning to the West. He has already made a pilgrimage to Beijing and paid homage to the Emperor. So he got this certificate written in Chinese language and Manchu language.” 票文西洋某国人某，年若干，在某会，来中国若干年，永不复回西洋，已经来京朝觐陞见，为此给票兼满汉字 (Huang 2003, p. 557).
- 2 The Latin manuscript was named *Diversorum autorum sententiae ex diversis codicibus collectae*, collected in Biblioteca nazionale centrale Vittorio Emanuele II (FG [3314]1185).
- 3 *Tianzhu Shilu* 《天主实录》 written by Ruggieri was the primary Chinese catechism from 1584–1596, it was suppressed and the plates were destroyed when Ricci’s *Tianzhu Shiyi* 《天主实义》 was published. However, the latter was strongly influenced by the former, both in terms of its structure and method of discussion. The transition from *Tianzhu Shilu* to *Tianzhu Shiyi* reflects the adjustments made in the “Accommodation Strategy” of the early Jesuit Mission in China (Wang 2022; Canaris and Wang 2023).
- 4 Matteo Ricci mentioned his interaction with many Chinese literati in *Fonti Ricciani*, Pasquale M.d’Elia ed. La Libreria dello Stato, 1942. Among the literati, Xu Guangqi, Yang Tingyun (杨廷筠), and Li Zhizao (李之藻) (Li 1965) were praised as three mainstays of Chinese Catholic history.
- 5 Many prefaces and postscripts are collected in *Tian Xue Ji Jie* 《天学集解》, compiled by Liu Ning of the Qing dynasty, collected 284 prefaces and postscripts that were written by Chinese people for Western books. It is currently stored in the St. Petersburg Library.
- 6 About this controversy, from the point of upholding Catholicism, Dunne (1962) and Väth (1933) claim that Buglio and Magalhães were jealous of Adam Schall’s position and glory at the Qing court. Tang (2014) analyzed Buglio and Magalhães as having a personal grudge against Schall and that they were complaining about Schall’s lack of rescue efforts. Still, he was neutral about what they revealed about Schall’s misdeeds. Erik Zürcher (2002) on the other hand, sympathized with Buglio and Magalhães, seeing the opposition to Adam Schall as an exhortation and alternative protection for their fellow brothers, in the hope that Schall would not repeat the same mistakes they made in Sichuan. Hsia (2017) saw the storm as a paradoxical expression of the Jesuits during the transition from the Ming to Qing dynasty.
- 7 “I came to Beijing in 1629 to revise the calendar by the Western new theory, and I have observed the celestial phenomena and made some astronomical instruments which were almost destroyed by the rebels, now I want to recreate them to present to you “臣于明崇祯二年来京，用西洋新法厘正旧历，制测量日月星晷，定时考验诸器。近遭贼毁，拟重制进呈。” (Zhao 1976, vol. 272, p. 10019).
- 8 Original text: “掌察天文，定历数，占候，推步之事，凡日，月，星食，风云，气色，率其属测候，有变异，密疏以闻” (Zhang 1974, vol. 74, p. 1810).
- 9 In ARSI, Jap-Sin 199 II, pp. 368–69. Buglio described Qin Tian Jian as an institution containing five departments, e.g., “钦天监正堂” (“kin tien kien chin tan,” literally means the nodal ministry of Qin Tian Jian), “历科” (“lie co,” literally means the department of the calendar), “天文科” (“tien wen co,” literally means the department of astronomy), “漏刻科” (“lou ke co,” literally means the department of hourglass and calibration), “回回国” (“hou hou co,” literally means the department of the Islamic calendar). The duties of each department were also indicated in Chinese. To be specific, “lie co” aimed at deducing and marking the favorable and unfavorable affairs (忌宜鑄注) and choosing auspicious days (吉期选择) on the calendar. “Tien wen co” was responsible for observing celestial events (天象观候). “Lou ke co” was asked to survey and calibrate orientations (方位相度) while “hou hou co” was in charge of inferring eclipse (交食推算).
- 10 These included the “民历” (mín li) for the general public, the “上历” (shàng li) for higher officials, the “东宫亲王历” (dōng gōng qīn wáng li) for the crown prince, and the “钦定壬遁历” (qīn dìng rén dùn li) among others.
- 11 Original text: “且所谓度数之学，多关历法之事，亦非占候祸福也。盖祸福所系，在吾心所造与夫造物主所降善恶之报也。占候星气，以预定国家安危，敝邦以为不正之术，特惑乱民志而无补心性世道，故王法禁之。” From Aleni’s 艾儒略 *Xi Fang Da Wen* 《西方答问》.
- 12 Original text: “盖天文占候之宜禁者，惧妄言祸福，惑世诬人也；若历法，则止于敬授人时而已。” (Xu 2014, vol. 7, p. 327).
- 13 Original text: “从古历家不言事应，言事应者天文也。天文之学牵合傅会，僥幸信其说，非惟无益，害乃滋大。” From Schall’s 汤若望 *Jiao Shi Li Zhi* 《交食历指》.
- 14 Original text: “交食经纬晦朔弦望，及节气七政当遵旨以更新，如神煞宜忌月令诸款，宜仍用旧，庶可备一代之良法，立万世之章程” from Li Tianjing’s 李天经 *Li Tianjing Ti Wei Gong Jin Xin Si Nian Qi Zheng Jing Wei Xin Li Shu* 《李天经题为恭进辛巳年七政经纬新历疏》。

- 15 Original text: “朝廷家也曾先酌定一个礼节，安排一个规矩，与同律度量衡一般，以便遵守了。还又见各处民情，大小事要选择日时，为是前代相传已久，习以为常”，“一好恶，同风俗，相期永远太平”。From Shall's 汤若望 *Min Li Bu Zhu Jie Huo* 《民历补注解惑》。
- 16 “Li Madou, the affiliated courtier from the Western country, presents some tributs “大西洋国陪臣利玛窦谨奏，为贡献土物事. *Gongxian Fangwu Shu* 《贡献方物疏》” [List of contributing specialties] (Han and Wu 2006, pp. 19–20).
- 17 Original text: “列国之大夫，入天子之国曰‘某士’，自称曰‘陪臣某’。” 郑玄注: “亦谓诸侯之卿也……陪，重也。” 孔颖达疏: “其君已为王臣，已今又为己君之臣，故自称对王曰重臣也。”.
- 18 “Western courtier Schall uses the astronomical theory and instrument to observe the celestial phenomena well” “远臣汤若望创法立器，妙合天行, *Libu Ti Zhun Gei Bianqin Bao Tianxue Shu* 《礼部题准给扁钦褒天学疏》，[The words to praise Tianxue allowed by Ministry of Rites]” (Han and Wu 2006, p. 38).
- 19 “Europe is a small country and Schall is the affiliated courtier of that country, he gets appointment just for his expertise in astronomy” 夫欧罗巴极西之小国也。若望小国之陪臣也。而其术诚验于天，即录用之。 (Ruan 1995, p. 588).
- 20 Original text: “通微教师光禄大夫加从一品通政使司通政使掌钦天监印务汤若望纂者” From *Minli Puzhu Jiehuo* 《民历铺注解惑》 .
- 21 “Considering Adam Schall was one missionary without a wife and son, when he was old, nobody took care of him, so Shunzhi ordered him to adopt one kid.” 世祖章皇帝，念汤若望矢志贞修。终身不娶，孑然羁旅。苦独无依。令其抚养一幼童。 (Han and Wu 2006, p. 300).
- 22 “Schall is a missionary of western religion, refrains from marriage and official, now he accepts the title and honor humbly...I follow the principles of Yao, Shun, Zhou, and Confucius...I have not read books on Western religion. Thus, I have no idea of its doctrines” “若望素习泰西之教，不婚不宦，祇承朕命，勉受卿秩，洊历三品，仍赐以通玄教师之名...夫朕所服膺者，尧舜周孔之道...况西洋之书，天主之教，朕素未阅览，焉能知其说哉。” See *Yuzhi Tianzhutang Beiji* 《御制天主堂碑记》，1657.
- 23 Such as Schall supported prince Xuan Ye (玄烨) to be the heir of the throne and hampered the Dutch diplomatic mission's activities, etc.
- 24 When Emperor Yongzheng issued the expulsion order of 1724, the family Catholic groups that were characterized by inter-generational inheritance mentioned earlier in the text became one of the sources of the underground church (Xiao 2015, pp. 194–202).
- 25 In 1826, Qin Tian Jian no longer appointed westerners. See “As Qin Tian Jian is familiar with western knowledge, westerners are no longer needed in Qin Tian Jian after Gao Gongchen disappeared or went back to the Europe” 时西人高拱宸等或归或没，本监已谙西法，遂止外人入官 (Zhao 1976, vol. 115, p. 3325).

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