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Contents

Indice

Primers, culture(s) of childhood and educational models in Europe (XVI-XXth centuries)

guest editors

Dorena Caroli and Alla Salnikova

- 11 Dorena Caroli, Alla Salnikova
Primers, culture(s) of childhood and educational models in
Europe (16-20th centuries)
- 19 Dorena Caroli
Ivan Fedorov's 1574 and 1578 Primers: a pedagogical
perspective
- 43 Maria Cristina Bragone
A Manual for the young Tsar: Simeon Polotskii's primer
- 59 Dzhamilya Ramazanova
Slavonic-Greek-Latin Primer by Fedor Polikarpov (1701):
history and sources of trilingual elementary education in
Russia
- 71 Gary Marker
Between Enlightenment and Orthodoxy: The Primers of
Platon (Levshin) and the Ascent of Secular Russian in the
Late Eighteenth Century
- 89 Olga Ilyukha, Yuri Shikalov
The primer at the cultural crossroads: an early stage in
the history of school books in Karelia (late 19th-early 20th
centuries)

- 109 Alberto Barausse
Learning to read and write in Italy in the second half of the nineteenth century. Primers and reading exercise booklets: publications, ministerial control and teaching (1861-1898)
- 151 Vitaly Bezrogov
Consolidating childhood: children and warpage in Soviet and post-Soviet Reading Primers 1945-2008
- 163 Maria Kozlova
Morality for kids in cultural and historical measurements: patterns, translated by primary school textbooks and their transformation in the post-Soviet period
- 185 Kristin Heinze, Carsten Heinze
The Educational Conceptualisation of the «Ethnic Community (*Volksgemeinschaft*)» in National Socialist Primers by the Example of Presentations of Adolf Hitler – Methodical Prospects
- 201 Alla Salnikova, Dilyara Galiullina
From an «ABC book with prayers» to the primer of a new type: Tatar primers of the late 19th-early 20th century
- 221 Wendelin Sroka
Research on the history of reading primers: a call for enhanced cross-border cooperation

Essays and Researches
Saggi e Ricerche

- 235 Wolfgang Brezinka
The ‘scientification’ of Pedagogy and its consequences. Retrospectives and prospects
- 249 Elisabetta Patrizi
La *Rethorica ecclesiastica* e l’*Omiliario* per la Chiesa ambrosiana scritti da Agostino Valier su istanza di Carlo Borromeo

- 291 Teresa González Pérez
At the cutting edge of education: learning to teach and teaching to learn
- 311 Maria Cristina Morandini
L'educazione dei sordomuti a Genova nell'Ottocento
- 337 Andrea Marrone
La pedagogia di Félix Dupanloup in Italia
- 357 Daniela Traffano
«Ignorancia e incivilización, o miseria y despotismo». Pueblos indígenas y escuelas de primeras letras vistos desde el poder estatal en Oaxaca, México, 1825-1889
- 379 Martine Gilsoul
Maria Montessori et la France. Genèse d'une histoire
- 399 Sara Mori
Perino's books and magazines for children: a new way to widen young readership in Italy (1882-1897)
- 419 Fabiana Loparco
«Boys of England», «The Boy's Own Paper», and the English influence in the Italian «Giornale per i Bambini»
- 445 Piero Fossati
L'edilizia per le scuole del popolo nell'Ottocento genovese
- 467 Elisa Mazzella
«With the love of a father, with the understanding of a mother». The figure of Father Giuseppe Vavassori (1888-1975): his educational and formative values
- 489 Ilaria Mattioni
Casa dolce casa: nascita e principi formativi della Scuola di educazione ed economia domestica di Bergamo (1908-1918)
- 513 Adriana Kičková, Mária Kiššová
The Educational System in the Slovak Region of the Czechoslovak Republic (1918-1930)

- 529 H. Manuel Pérez-Moreno, J. Carlos González-Faraco
La sección femenina de la Falange española y su papel en la formación de la mujer rural durante la dictadura del general Franco
- 549 Carla Ghizzoni
La ginnastica nelle scuole primarie milanesi nel primo decennio postunitario
- 579 Luciane Sgarbi Santos Grazziotin, Terciane Ângela Luchese
The schooling process and teacher training in the Italian colonial region of Rio Grande do Sul, Brazil (1910-1940)
- 603 Paolo Scotton
Educazione alla vita politica. Individuo e società nel pensiero di José Ortega y Gasset, a partire dalle *Meditaciones del Quijote* (1914)
- 623 Tareq M. Zayed, Abdullah al-Mizan
History of emancipatory worldview of Muslim learners
- 643 Bienvenido Martín Fraile, Isabel Ramos Ruiz
Una nueva manera de interpretar los cuadernos escolares: las escrituras al margen
- 661 Gurutze Ezkurdia Arteaga, Karmele Perez Urraza, Begoña Bilbao Bilbao
Citizenship model in an informational society

Critical Reviews and Bibliography

Rassegne critiche, Discussioni, Recensioni e Bibliografia

Critical Reviews / Rassegne critiche

- 685 Anna Ascenzi, Elisabetta Patrizi
I Musei della scuola e dell'educazione e il patrimonio storico-educativo. Una discussione a partire dall'esperienza del Museo della scuola «Paolo e Ornella Ricca» dell'Università degli Studi di Macerata
- 715 Gianfranco Tortorelli
Editoria e storia dell'arte: il contributo di Giuseppe Mayländer e della casa editrice Apollo

The minor universities in the higher education system of united Italy: the case of the University of Macerata

Proceedings of the study seminar
Macerata, 27th November 2013

Gli atenei minori nel sistema d'istruzione superiore dell'Italia unita: il caso dell'Università di Macerata

Atti del seminario di studi
Macerata, 27 novembre 2013

- 755 Gian Paolo Brizzi
Universities in the papal Marca: «imperfectae, perfectae aut perfectissimae»?
- 769 Floriana Colao
Le Università minori. Considerazioni storiografiche, discutendo due recenti volumi sulla storia dell'Università di Macerata
- 781 Simonetta Polenghi
Due recenti volumi sulla storia dell'Università di Macerata

Forum / Discussioni

- 791 Giorgio Chiosso
Imparare a scrivere lettere
- 797 Anita Gramigna, Patricia Delgado-Granados
Storia ed evoluzione. Dai paradigmi scientifici alle nuove frontiere dell'educazione
- 813 Raffaella C. Strongoli
New education and active school in Europe in the early 20th century. Models, themes and figures

Scientific News and Activities of Research Centres
Cronache scientifiche e Attività degli istituti di ricerca

- 825 Anna Ascenzi, Dorena Caroli, Luigiaurelio Pomante,
Roberto Sani
History of education and children's literature in the Italian universities (1988-2013). Anatomy of a university discipline between teaching, scientific research and cultural presence

- 833 Daniela Popa, Mariana Norel, Bogdan Cristian Voicu
Freinet Pedagogy in Romania
- 843 Antonella Cagnolati, José Luis Hernández Huerta
L'Italia nella mente e nel cuore della pedagogia spagnola,
iberoamericana e africana. I risultati di un convegno
(Università di Salamanca, 4-6 giugno 2014)
- International Bibliography*
Bibliografia Internazionale
- 853 Dorena Caroli, Luigiaurelio Pomante
International Bibliography of the History of Education and
Children's Literature (2013)
- 855 Abbreviations and Acronyms
- 874 Publications: A. Journal Articles
- 996 Publications: B. *Miscellanea* and monographs
- 1107 International Referees' Committee (2014)

*Primers, culture(s) of childhood
and educational models
in Europe (XVI-XXth centuries)*

guest editors

Dorena Caroli and Alla Salnikova

Primers, culture(s) of childhood and educational models in Europe (16-20th centuries)*

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ABSTRACT: This collection of articles is devoted to the history of primers, literacy and education in some European countries during XVI-XX centuries. Most of them were presented during the international Conference "*The source of child's learning...: the role of primers and basal readers through time and cultures*" organized by the Russian State University for the Humanities, the Russian Academy of Education, the Ushinsky State Scientific Pedagogical Library, the State Library of Russia and the State Public Historical Library and held at the Ushinsky State Scientific Pedagogical Library from 8 to 12th October 2014. A considerable part is devoted to spellers printed in Russia in the 16th and 17th centuries and addresses the education of the tsar, the nobility and the clergy; the others present new researches on the history of primers in different European countries from different points of view (from multilingual and school to education and totalitarian ideologies) in order to show how, through the changes of the modern Era, they can be considered not only a literacy tool but also a tool for propaganda, promoting new values in the mass schooling of the 20th century.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Primary education; USSR; Germany; Italy; Karelia; XVI-XX Centuries.

* The article is supported by the Russian Foundation of Humanities (RFH) grant #13-06-00038a.

General Introduction

A considerable number of the essays published in this special issue were presented during the international Conference “*The source of child’s learning...: the role of primers and basal readers through time and cultures*” held in the Ushinsky State Scientific Pedagogical Library from 8 to 12th October 2014 and organized by the Russian State University for the Humanities, the Russian Academy of Education, the Ushinsky State Scientific Pedagogical Library, the State Library of Russia and the State Public Historical Library¹. The conference was dedicated to the 440th anniversary of the first Eastern European reading primer by Ivan Fedorov and its Moscow equivalent by Vasilij Burtsev, but the «K.D. Ushinsky» Library has been carrying out a project of digitalization Russian primers for several years².

School textbooks, including primers, have always been a crucial element of childhood culture and an all-important tool for shaping the idea of the Self and the Other, as well as of the world in general. The multi-functionality of a primer cannot be boiled down to its role as a basic literacy tool. Primers combine educational, moral, aesthetic and entertainment functions, which makes them the main text for a child’s construction of culture, a text with a tendency to be canonized. The creation and reassessment of cultural meanings and hierarchies of values, reconstruction of the past and (more frequently) current events, their explicit or implicit evaluation, the recreation of “heroes” and “leaders” as the paragons of social life and behavior to be emulated – all of these factors have transformed the primer into a child’s “guidebook” to the adult world at large. It is a certain organizing and ordering factor for the sociocultural and sociopolitical space that surrounds a child, captured in words.

Paraphrasing Norman Douglas’ famous saying – “You can tell the ideals of a nation by its advertising” (*South Wind*, 1917) – we can say that the ideals of a nation, acquired largely by indoctrination, can be judged, amongst other things, by its primers³. The authorities have rarely stayed away from the production of

¹ The Guest Editors are grateful to Vitalij Bezrogov for his valuable help in collecting these articles, and to Vladimir Makarov for his help in translating the text of General Introduction.

² For more details on the project carried on by the “K.D. Uschinsky” Library see D. Caroli, *Leafing primers and readings books. Recent trends in the history of school books in Europe*, «History of Education & Children’s Literature», vol. VII, n. 2, 2012, pp. 471-476. See also a collection of essays issued by these investigations V.G. Bezrogov, T.S. Markarova (edd.), «*Pora chitat’»: bukvari i knigi dlja chtenija v predrevoljutsionnoj Rossii, 1900-1917. Sbornik nauchnykh trudov i materialov*», Moskva, NPB im. K.D. Uschinskogo, 2010.

³ For a comparison between Italy, Germany and England see, for example, P. Lucchi, *La Santacroce, il Salterio, e il Babuino: libri per imparare a leggere nel primo secolo della stampa*, «Quaderni storici», XIII, n. 2, 1978, pp. 593-629; M.L. Bailey, *Hornbooks*, «The Journal of the History of Childhood and Youth», 6, n. 1, 2013, pp. 3-14; A. Cagnolati, *Hornbooks and prayers. Textbooks for Children in Reformation England (XVIth century)*, «History of Education and Children’s Literature», vol. III, n. 2, 2008, pp. 59-66; G. Teisler, *Fibeln als Dokumente für die*

primers, using them as a means of their own legitimation. Therefore a primer, as a rule, has received official approval ‘from above’, reflecting and embodying the government’s educational and moral policies and the resulting moral and educational standards. Despite the perceived fragmentation of the primer texts as a set of letters, letter combinations, syllables, words and phrases, they form a coherent and complete narrative. Like nothing else, primers reconstruct an image of the ‘ideal reality’ in a most clear and accomplished way, since this image has been formed and preserved in the conscience of the ‘authorities’, has been translated into the educational process, and has to be rooted into the conscience of the nation’s young citizens. The main idea of the primer has always been shaped by the political thought of the period, with the primer itself acting as a vivid example of the multiplicity and flexibility of its manifestations. The discourse of power could reveal itself in the primer by means of sociopolitical, racial, ethnic, confessional or gender discourse, or as a combination of several discourses simultaneously.

We should never forget that a primer, with all its perceived simplicity and even trivialization, is a coded text, where the ratio of the arcane and the mundane, the implicit and the explicit can be endlessly variegated depending on the historical context it is constructed within and the particular historical and political situation that conceived it. This, in particular, concerns the political and cultural involvement of the primer, which usually underpins its external de-ideologization. Therefore a primer (as a certain macrotext and a combination of a number of intertextualized microtexts) should be “read” correctly both by ‘children’ and ‘adults’. The degree of its influence over child audience largely depended on how it was perceived and understood by them as the main “consumers” of an educational text.

The contents of every primer is an ideal, utopian imaginary construct. The ‘imprinting’ of the ideal exploits the productivity of the first years at school, as a child’s perception at that age is relatively independent, direct and spontaneous. Meanwhile, it is its ‘imaginariness’ that makes it possible to adapt the primer to the practices of children’s consumption. Imagination, myth and fairy tale hold a special position in childhood understanding of reality, its perception and memorization.

It is also evident that the image of the present “ideal” (and/or, occasionally, past or future) in the primer is romanticized, refined and sublime, whereas the depiction of reality is selective, fragmentary, subjective and often influenced by the mores of the age. The author of a primer always deals with a limited range of markers that can be used to represent reality. Otherwise, it can lead to overlapping of images in the mind of a child or their blurring, and

consequently to non-assimilation of the text or even to its rejection. Thus a primer text, whether verbal or visual, should be completely comprehensible, accessible, aestheticized, variegated, emotionally intense, loaded with content, and accompanied by recognizable visual images.

Visual images, indeed, contributed to an important change in the history of primers from the 16th to the 20th centuries, when primers and other school textbooks constituted a propaganda tool. As Merridee L. Bailey recently argues, “in 1529 the humanist Erasmus accredited visual imagery as a distinct apparatus in educating young children [...] Erasmus suggests that visible cues encourage children to go further with their studies and that seeing painted pictures can be used to introduce lessons in naming objects and animals in Latin and Greek”⁴. Furthermore, as Barbara Ormond has demonstrated, in seventeenth-century England, the *visual aspect* was a very important pedagogical tool and the predominant medium was the woodcut print used to print broadsheets, ballads, chapbooks and other cheap publications destined not only for children but also for illiterate adults⁵. As B. Ormond also recently mentioned, “Copper engravings were normally outside the affordability of the rural dweller or town laborer but were aimed at an increasingly affluent ‘middling sort’, such as urban tradesmen, shopkeepers and artisans. Nevertheless, while purchase prices may have been beyond the means of some members of English society, there were venues which enabled a large audience to view and read ballads, pamphlets and chapbooks”⁶.

Among the multitude of primers filling up the educational space, a special place is reserved for the so-called ethnic or national primers, published in the languages of the minorities existing within the multilingual space of a multiethnic society. Ethnic primers, especially those on the cultural frontier (discussed by Frederick Jackson Turner, in the work *The Frontier in America History*, 1921), are meant to teach native language to children of “our” ethnicity, or, not infrequently, a second language to children of “others” in the same region. Their goals also include enrichment and diversification of inter-ethnic communicative practices by means of learning a new language, building bridges between one’s “own” and “other” cultures and creating new opportunities for their intermingling and mutual enrichment. Studying such primers is a highly topical task for a number of researchers⁷.

⁴ M.L. Bailey, *Hornbooks*, «The Journal of the History of Childhood and Youth», 6, n. 1, 2013, pp. 3-14 (see pp. 6-7).

⁵ C.C. Butterworth, *The English Primers, 1529-1545: their publication and connection with the English Bible and the Reformation in England*, Philadelphia, University of Pennsylvania Press, 1953; B. Ormond, *Pedagogy and pictorial evidence: interpreting Post-reformation English Prints in context*, «The Curriculum Journal», 22, n. 1, 2011, pp. 3-27 (see pp. 8-9).

⁶ *Ibid.*, p. 9.

⁷ See, for example, G. Geissler, W. Sroka, J. Wojdon (edd.), *Lesen lernen... mehrsprachig! Fibeln und Lesebücher aus Europa und Amerika. Katalog zur Ausstellung der Arbeitsgruppe Fibeln (Reading Primers Special Interest Group) der Internationalen Gesellschaft für historische und*

Primer studies as a special strand in socio-humanitarian knowledge started as late as the early 1940s. It occurred within the boundaries of ‘new educational history’, which suggests that educational realities should be viewed from a political and sociocultural perspective. At the same time, sociopolitical and cultural factors should themselves be viewed through the lens of educational history. Such an approach postulated the need to extend the range of sources, and hence the interest in such a little-studied field as primary school textbooks, including primers. Since then, primers have successfully been studied as a separate sociocultural phenomenon useful for acculturation and the indoctrination of the new generations around the world⁸. Primer studies are interdisciplinary by nature and bring together researchers from various fields – historians, linguists, educationalists, psychologists, art historians and scholars of cultural studies, etc. This interdisciplinary approach has made primer studies sustainable and productive. By studying primary school textbooks and primers in Brazil and China, Belarus and Russia, the Czech Republic and Poland, Estonia and Latvia, Germany and France, Canada and the USA, Norway and Croatia, Italy and Spain, South Africa and Australia, as well as other countries and regions of the world, researchers have been able to prove the need for and value of studying such sources, as well as primer studies’ exclusive role in researching both national, educational and moral practices, and national histories and cultures in general⁹.

The present special issue presents eleven articles concerning the history of primers in Europe and in particular Russia and the Soviet Union gathered into two different sections. The first section is devoted to Russia and Karelia; the second concerns Italy, Germany, and Soviet Union in different historical periods, but the reader will do doubt notice a number of common threads running through the adopted methodologies.

The first section deals with Russia beginning from the first Russian primers. To mark the 450th anniversary of the publication of the first primer by Ivan

systematische Schulbuchforschung im Rahmen der Tagung “Mehrsprachigkeit und Schulbuch” vom 22. bis 24.9.2011 an der Freien Universität Bozen in Brixen/Bressanone, Gesamtleitung und Redaktion Wendelin Sroka, Bonn/Essex im Selbstverlag, 2011.

⁸ *Bibliomanes: bibliografía sobre manuales escolares de “Otros países”*, Centro de Investigación MANES, 2011; *Studies on Reading Primers and Elementary Readers – an International Bibliography*, 2010; G. Teistler, *Schulbücher als bildungsgeschichtliche Quellen: das Beispiel der Fibel*, 2009 (Eckert, Beiträge 6); *Using Textbooks as a Research Resource: a Bibliography*, Pittsburgh (Digital Research Library), September 2001.

⁹ V. Bezrogov, K. Mahamud Angulo, W. Sroka, J. Wojdon (edd.), *International Bibliography of Studies on Reading Primers and Basal Reader (IBSP)*, Bonn, 2011; O.V. Kabasheva, *Issledovanija rossijskikh bukvarej [Studies on Russian Primers]. Bibliograficheskij ukazatel’*, in “Bukvar’ – eto molot” [Primer is the Hammer]: *Uchebniki dlja nachal’noj shkoly na zare sovetskoy vlasti, 1917-1932*, Moskva, NPB im. K.D. Ushinskogo RAO, Azimut, Trovant, 2011, pp. 346-367; O.V. Kabasheva, *Bukvari i knigi dlja chtenija v issledovanijakh otechestvennykh i zarubezhnykh uchenykh [Primers and Elementary Readers in Russian and Foreign Scholars’ Studies] (ukazatel’ literatury)*, «Problemy sovremennoogo obrazovanija», n. 5, 2012, pp. 228-236.

Fedorov, Dorena Caroli presents the main trends in the investigations of the first two Russian primers by Ivan Fedorov (1574 and 1578) in the context of the introduction of printing under Ivan the Terrible, while Maria Cristina Bragone deals with Simeon Polotskii's Primer (1679) which was the textbook for the Young Tsar. Dzhamilya Ramazanova analyses the history of trilingual elementary education in Russia through the Slavonic-Greek-Latin primer by Fedor Polikarpov (1701), composed under Tsar Aleksei's and Patriarch Nikon's supervision, and Gary Marker – the pioneer in the study of the Russian primers¹⁰ – the primers of Platon (Levshin) and the ascent of secular Russian in the Late Eighteenth Century. These case-studies offer very representative examples of Russian primers between the sixteenth and nineteenth centuries and show a deep change in the dissemination of printed primers after the Nikonian reforms due to the need for literacy by churchmen both to recite the liturgy correctly and to defend their clerical position¹¹, but also to a definitive distancing of the Russian Church from the Roman Catholic tradition. The conquest and spread of the Russian alphabet probably meant the supremacy of Orthodoxy in Russia and the beginning of the achievement of the Muscovite “Third Rome” political theory marked by the supremacy of spiritual power over the temporal. Furthermore Olga Ilyukha and Yuri Shikalov demonstrate how the controversy between the Orthodox and the Lutheran Church in the border region influenced the choice of the character set for the Karelian language alphabet.

The essays presented in the second section investigate primers from the point of view of educational policy, addressed to the shaping of a nation and ideology from the 18th to the 20th centuries. Alberto Barausse deals with the problem of literacy in Italy after Unification (between 1861-1898), showing the features of spellers from the points of view of authors and publishers, their circulation at national level and the pedagogical debates concerning spellers as the first “educational media”. Alla Salnikova and Dilyara Galiullina study the question of the use of other languages and alphabets in Tatarstan (Russia) and show how the changes due to the spread of the progressivist ideology of Jadidism produced a school reform and the use of new primers based on a more advanced phonetic method of teaching, which taught Tatar instead of Arabic or Turkish. Carsten Heinze and Kristin Heinze discuss the educational conceptualisation of the “ethnic community” (*Volksgemeinschaft*) in national socialist primers, which could be considered “educational media” in the same way as school books¹². Finally, Vitalij Bezrogov – well known for his definition of “primers studies” (*bukvaristika*)¹³ – analyses the topic of children and “warfare” in Soviet and

¹⁰ G. Marker, *Primers and Literacy in Muscovy: A Taxonomic Investigation*, «Russian review», 48, n. 1, 1989, pp. 1-19.

¹¹ *Ibid.*, pp. 6-8.

¹² S. Lässig, K.H. Pohl, *History Textbooks and Historical Scholarship in Germany*, «History Workshop Journal», n. 67, 2009, pp. 125-139.

¹³ V.G. Bezrogov, *Bukvaristika [Primers' Studies]: Zarubezhnaja issledovatel'skaja literatura*,

post-Soviet Reading primers (1945-2008), arguing that the idea of war was included in the subculture of Soviet and post-Soviet childhood as constructed by the authorities and society. Furthermore Maia Kozlova describes, from a sociological point of view, patterns translated by primary school text-books and their transformation in the post-Soviet period, focusing on morality and showing that the function of moral socialization is performed by more personalized subjects – a small group, the family.

Concluding this special issue is an essay by Wendelin Sroka, pioneer of Primer studies and influential promoter of the Reading Primers Special Interest Group (RP-SIG) of the International Society for Historical and Systematic Research on Schoolbooks since 2009, in the hope to enhance his activity at international level. Sroka is co-editor of the Reading Primers International Newsletter, which provides information about our network and its activities, about research on primers. Thanks to his research activity a real scholarly network on the history of primers has been created in Europe, sparking renewal of interest in spellers and primers as important tools for children literacy.

In all these cases, spellers and primers produced and printed in different societies constitute a valuable source for the analysis of literacy but most of all provide an image of childhood and educational systems with different faiths, nationalities, identities and ideologies.

Ivan Fedorov's 1574 and 1578 Primers: a pedagogical perspective

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ABSTRACT: The present article intends to present a historiographical review of recent studies concerning the two first primers in Cyrillic, printed respectively in 1574 and 1578 by Ivan Fedorov (c. 1510-1583) in the context of the edition of the first Russian editions of Holy books in East Slavonic. The two primers, despite the four years that separated them, were very different from the point of view of the content and of the educational models that they proposed. This article is therefore divided into three parts. The first deals with the activity of the printer Ivan Fedorov, who worked in Moscow and moved first to L'vov, then to Zabludov and finally to Ostrog, where he could print thanks to the patronage of the Tsar and local princes. The second and third parts present an analysis and comparison of Fedorov's two primers which reflect two different educational conceptions, both for an Orthodox education but also, and antithetically, for the educational program taught by the Jesuit Colleges in Poland. Primers were used in the first classes of the Orthodox schools which offered a program based on the liberal arts. The first, published in 1574 in East Slavonic, was to be used in the first class of the *L'vov Brotherhood school*, while the second, published in 1578 in Greek and East Slavonic, was destined for use in the Ostrog school. The first primers contained some principle of the Orthodox pedagogy presented by the *Stoglav (Book of the Hundred chapters)* and the *Domostroj (Domestic Order)*; the second one was bilingual and expressed a culture oriented against Latin and which refuted the Unification of the Catholic and Orthodox Churches.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; History of education; Russia; XVI Century.

Introduction

The study of primers in Russia attracted renewed interest both on occasion of the 450th anniversary of the publication of the first primer in East Slavonic (1574) by the master printer Ivan Fedorov (c. 1510-1583) – deacon who

lived at the time of Tsar Ivan IV the Terrible – and of the 500th anniversary of Fedorov's birth. This interest addressed both the history of book printing in a more general context, and of the history of schoolbooks in particular, which in recent decades has become a new field in the history of education¹.

The investigations of the two first primers by Ivan Fedorov bring the historian back to the time of Tsar Ivan the Terrible, eminently studied by Isabel de Madariaga, who highlights the important cultural role played by the Metropolitan Makarius (1542-1564). Makarius encouraged the introduction of printing in Moscow in order to increase the reproduction of Holy Books². Since the creation of the Slavonic alphabet by Cyril and Methodius in 855³, numerous manuscript translations of Holy Books were made by their pupils⁴, who converted the south Slavic population to the Orthodoxy of the Byzantine rite until the Fall of the Byzantine Empire in 1543. This strengthened the role of Moscow in the Orthodox Church, and stimulated a particular interest in the humanist culture which arrived in Russia from the Italian peninsula.

Recent researches have demonstrated the role of cultural mediation played by Michele Trivolis – a Dominican monk of Florentine origin – who was educated with the humanist Giovanni Lascaris and a correspondent of Giovanni Pico della Mirandola. Trivolis was also an acquaintance of the printer Aldo Pio Manutius (ca. 1460-1515) and was familiar with the books that Manutius published in his Venetian printing shop. On entering the Monastery of Vatopedi in Monte Athos, Trivolis received the name of Maksim the Greek, was sent to Moscow (in place of the old man, Savva) and stayed there for the rest of his life, dedicating himself to the translation of Holy Texts. He was later accused of heresy in 1525 because of the errors made in his translations from Greek into East Slavonic (old Church Slavonic)⁵.

The presence of Maksim the Greek constituted an important premise for Moscow's first printing shop, which produced the first Holy books and set the scene for Ivan Fedorov's later activity. Fedorov was the printer of the two

¹ I am grateful to prof. Vitalij Bezrogov, coorganiser of the «*The source of child's learning...: the role of primers and basal readers through time and cultures*» held in the Ushinsky State Scientific Pedagogical Library from 8 to 12th October 2014 and to prof. Sergej N. Bogatyrev (SES/UCL, London), co-organizer with the British Library of the Conference «*Revisiting Ivan Fedorov's Legacy in Early Modern Europe. The 450th Anniversary of Ivan Fedorov's Acts and Epistles (Apostol) and the 440th Anniversary of His Primer (Azbuka)*», held on Friday 9th May 2014 in London, for their useful suggestions and comments.

² I. de Madariaga, *Ivan the Terrible: first Tsar*, New Haven and London, Yale University Press, 2005, pp. 155-157.

³ F.D. Liechtenhan, *Les trois christianismes et la Russie. Les voyageurs occidentaux face à l'Église orthodoxe russe XV^e-XVIII^e siècle*, Paris, CNRS Éditions, 2002.

⁴ For the collection of manuscripts conserved in Italian libraries, see D. Ciampoli, *I codici paleoslavi della R. Biblioteca Nazionale di S. Marco*, Roma, Tip. Poliglotta della S.C. de Propaganda Fide, 1894; E. Voordeckers, *Les Manuscrits slaves de Venise*, «Slavica Gandensia», n. 1, 1974, pp. 141-153.

⁵ E.L. Nemirovskij, *Ivan Fedorov okolo 1510-1583*, Moskva, Nauka, 1985, pp. 32-34, 39-41.

first Russian primers and benefited from Maksim's advice, making efforts to print more translations before the monk's death in 1555-1556. According to the Russian scholar Evgenij Nemirovskij, Fedorov admired the monk for his extensive knowledge of Greek culture and also, with all probability, of his printed books; some claim that he copied the Venetian-style ornamentation for his primers from books in Maksim's collection⁶.

Given this context, primers constitute a very complex source. The analysis of the publication of the first primers of 1574 and 1578 requires the integration of findings from a range of disciplines: only in this way is it possible to build up a complete picture of the relevance of the printing of the first two primers to the printing of books in general, as well as to the emergence of a humanist culture and Russian education in the Modern Age. The study of the two first primers requires skills in Slavonic philology, paleography and Biblical exegesis in order to establish a hierarchy of sources. Fortunately, the historiography of Primers features prominently in the fields of history of the book and Slavonic philology. The Soviet historiographical tradition in particular, specializing in linguistic studies, enhanced the history of Primers from the point of view of structure, history of the language, and reading method, and their dissemination in a period of intensive printing activity.

The study of Russian Primers of the Modern Age has attracted the attention of highly-regarded historians who have analyzed them from very different viewpoints: in 1980 the American historian Max Okenfuss, following on from the Frenchman Philippe Ariès, grappled with the 'discovery of childhood' in the first Russian primers edited between the XVIth and XIXth century, basing his study «on an examination of all major printed editions of Slavic primers both in Moscow and in the areas of the Ukraine, Belorussia and Lithuania from their appearance in the 1570's until 1800»⁷. Christine Thomas and Gary Marker made an important contribution to the advancement of the history of primers, focusing on Ivan Fedorov's influence on the structure of others' ones, on their dissemination and on their profound evolution in terms of the language used and the content of the reading texts⁸.

Following the pioneering researches by V.I. Lukjanenko⁹, Evgenij L. Nemirovskij brilliantly analyzed the history of the first books printed by Ivan Fedorov and carried out a precise census of the primers and printed books

⁶ *Ibid.*, pp. 32-34, 39-41.

⁷ M. Okenfuss, *The discovery of Childhood in Russia. The evidence of the Slavic primer*, Newtonville, Oriental research partners, 1980, p. 12.

⁸ With the two fundamental studies by C. Thomas, *Two East Slavonic Primers: Lvov, 1574 and Moscow, 1637*, «(Electronic) British Library Journal», vol. 10, n. 1, 1984, pp. 60-67; G. Marker, *Primers and Literacy in Muscovy: A Taxonomic Investigation*, «Russian Review», 48, n. 1, 1989, pp. 1-19, on should add the one by M.C. Bragone, *Alfavitari radi ucenija detej: un abbecedario nella Russia del Seicento*, Firenze, Firenze University Press, 2008.

⁹ V.I. Lukjanenko, *Pervoizdanija pervopechatnoj azbuki Ivana Fedorova, in Knigopechatanija i juzhnye sobranija v Rossii do serediny XIX veka*, Leningrad, BAN SSSR, 1979, pp. 6-25.

by the Muscovite printer now preserved in different European and American libraries¹⁰. Recently, B.V. Agadzhanov placed Fedorov's printing activity in the context of the evolution of primers from the point of view of the history of schoolbooks between the 16th and the 17th centuries. He analyses the activity of the most important Primer authors in relation to the kind of school in which their books were used (Lavrentij Zizanij, Meletij Smotrickij, Timofej Verbickij, Spiridion Sobol', Vasilij Burcov, Simeon Polockij, Karion Istomin, Fedor Polikarpov, Gavril Buzhinskij and Feofan Prokopovich)¹¹.

In order to account for these different specialized studies, the present essay is divided into three parts. The first presents the activity of the master printer Ivan Fedorov and his move from Moscow to Ostrog in relation to the birth of printing and the production of the first Holy texts in Muscovy. The second and third parts present a comparison of the two primers which were grammars and not simply spellers and contained edifying readings in the final part. Nevertheless, although published within four years of each other (in 1574 and in 1578), they reflected an important cultural change and a changing role in the development of literacy and the future of Christian Orthodoxy.

The second part deals with the structure and linguistic characteristics of the 1574 primer and its readings. This primer had a lot in common with one section of the *Book of the Hundred Chapters* (*Stoglav*, 1551) and with the *Domostroj* (*Domestic order*), an important mid-16th century treatise attributed to the priest Sil'vestr (who served in the Kremlin Cathedral of the Annunciation from c.1545 to c.1556)¹² and, additionally, with the statute of the *Brotherhood School* in L'vov which assimilated these principles into its educational structure. It could be used under the mentorship of a private tutor but also in the Orthodox schools which were established after 1586 to educate the clergy in an attempt to limit both the spread of Protestantism and the Jesuits' monopoly in the field of education¹³.

¹⁰ See the description of "Azbuca" by E.L. Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*. Pod red. L.S. Glebova, Moskva, Enciklopedija, 2007, pp. 48-75.

¹¹ B.V. Agadzhanov, *Sozdateli pervykh uchebnykh knig dlja nachal'nogo obuchenija gramote – bukvarej i azbuk XVI – pervoj chertverti XVIII vv.*, «Problemy sovremennogo obrazovanija», n. 2, 2010, pp. 50-77.

¹² Okenfuss, *The Jesuit origins of Petrine Education*, in J.G. Garrard (ed.), *The Eighteenth Century in Russia*, Oxford, At the Clarendon Press, 1973, pp. 106-130. For the full text, see E. B. Emchenko, *Stoglav. Issledovanie i tekst*, Moskva, Indrik, 2000, pp. 286-287; *The Domostroi: rules for Russian households in the time of Ivan the Terrible*, edited and translated by C.J. Pouncy, Ithaca and London, Cornell University Press, pp. 4, 27-33, 65.

¹³ M.J. Okenfuss, *The Jesuits origins of Petrine Education*, in Garrard (ed.), *The Eighteenth Century in Russia*, cit., pp. 106-130; see the chapter *Proposte educative e istituzioni scolastiche delle Congregazioni e degli Ordini religiosi (sec. XVI-XVII)*, in R. Sani, *Educazione e istituzioni scolastiche nell'Italia moderna (Sec. XV-XIX). Testi e documenti*, Milano, Pubblicazioni dell'I.S.U. Università Cattolica, 1999, pp. 511-584; A. Mariani, *Le strategie educative dell'aristocrazia polacco-lituana (1720-1773). Il ruolo dei gesuiti fra ideale retorico-umanistico e pratica pedagogica*, «History of Education & Children's Literature», vol. VIII, n. 1, 2013, pp. 295-318.

In February 1564, with the approval of the sacred *Sobor* and the Council of Boyars, the legendary 'white miter' (part of Constantine's Donation and symbol of the supremacy of spiritual power over the temporal) had moved from Novgorod to Moscow. This occurred at a time of great economic expansion, with the Monasteries owning one third of the land in the Muscovite Kingdom¹⁴. Makarius began to extend the Metropol's hegemony throughout Russia¹⁵, tying Moscow to the vision of the Third Rome, in contrast to the spread of Protestantism and the attempt to unify the Catholic Church with the Orthodox one.

The third part will describe in detail the 1578 primer, the first bilingual primer in the history of Russian primers. Written in East Slavonic and Greek, it included amongst its reading texts *The Legend of how Saint Cyril created the alphabet of the Slavonic language and translated books from Greek into Slavonic* (*Skazanie kako sostavi svjatoj Kirill Filosof Azbuku po jazyku sloven'sku i knigi prevede ot grecheskich na sloven'skij jazyk*). Through this reading, Fedorov enacted the Ostrog prince's political proposal to declare the primacy of the Orthodox religion, which must be interpreted in the context of Pope Gregory XIII's religious (and political) dream to unify the two Churches, Catholic and Orthodox, against the threat of the Ottoman Empire. The inclusion of Greek was an attempt to provide a philological justification of the origins of Cyril and Methodius's language with liturgical aims. This operation was in effect an anti-Latin trend which was common in the Orthodox Church until the Great Schism of 1643 and continued until Peter the Great's reform of the alphabet in the early decades of the seventeenth century.

1. *The master printer Ivan Fedorov: from Moscow to Ostrog*

The introduction of printing in Russia came almost two centuries after the discovery of movable type in 1439 in Mainz (Germany), where primers began to be printed in large quantities¹⁶. Ivan IV the Terrible, better-known for the *oprichnina* arrests and murders than for his cultural initiatives¹⁷, founded a State Printing House (*Pechantyj Dvor*) on the suggestion of the Metropolitan Macarius. The *Book of the Hundred Chapters* (*Stoglav*, 1551), the collection of decisions of the Russian Church Council on which Orthodox canon was defined, dedicated particular attention to the education of young people through the

¹⁴ H.-J. Torke, *Einführung in die Geschichte Russlands*, München, C.H.Beck, 1997, pp. 63-68.

¹⁵ de Madariaga, *Ivan the Terrible*, cit., p. 156.

¹⁶ See the chapter on books and readers by R.A. Houston, *Literacy in Early Modern Europe. Culture and Education 1500-1800*, Harlow, Longman-Pearson Education, 2002, pp. 173-225 (see p. 182).

¹⁷ de Madariaga, *Ivan the Terrible*, cit., pp. 174-188.

creation of a school in every town (art. 26) and to emend all printed liturgical books (art. 27). Indeed, article 26 of the *Stoglav*, «On the institution of literacy in all towns» (*Ob uchilishchex knizhnix po vsem gradom*) stated that, according to the Tsar's wishes, «these same archpriests and senior priests, together with all the priests and deacons, each in his own town, shall select, with the blessing of their bishop, worthy, pious priests and deacons and married sextons and pious men, with the fear of God in their hearts, who can be of use to others and who know their letters and reading and writing, and shall establish schools in the houses of these priests, deacons, and sextons, so that priests and deacons and all Orthodox Christians in each town would send them their children to learn reading and writing and church singing»¹⁸.

Naturally the printing of books provided in article 27 of the *Stoglav* was a *condicio sine qua non* for the education of literacy. Before the setting up of the State Printing House by Ivan IV in the mid 1500s, a printing shop was opened in Moscow. The deacon Ivan Fedorov worked here for a time, as master printer and man of letters. Born c.1510 in Moscow¹⁹, Fedorov reaped the heritage of the other master printers working in the city, including Bartolomeus Gothan of Magdeburg who arrived in Moscow at the end of the 1500s, after having worked at printing shops in Lübeck and Stockholm²⁰.

Fedorov was no mere artisan. He had studied at the Jagiellonian University of Kraków – then capital of Poland – where he lived in the famous ‘Jerusalem’ seminar which housed students from Germany and Hungary, as well as from Ukrain and Byelorussia. He attained his Bachelor degree in 1532 under the rectorate of the Ukrainian humanist Stanislaw Bil (identified in the source as *Ruthenus*, i.e. Russian). Fedorov also studied Latin (Latin and Latin literature were restored after a period of tensions within the University), Greek and ancient Hebrew from grammars and books printed in Kraków²¹.

This kind of humanistic education was not conceivable for the Russia of the XVI century. *Studia* did not exist, nor did princely courts which could offer patronage for the development of the *studia humanitatis* as occurred in the courts of the Italian city states²². The exception was Maksim the Greek's cultural activity. The monk dedicated himself to the translation of Holy Books into Old Church Slavonic and had considerable influence on Fedorov's primers

¹⁸ The original text with linguistic commentary is presented by Emchenko, *Stoglav. Issledovanie i tekst*, cit., pp. 286-287.

¹⁹ For his biography see E. Osetrov, *Mir Pervopechatnika (K 400-letniju so dnja smerti Ivana Fedorova)*, Moskva, Znanie, 1983 and T. Murav'eva, *Ivan Fedorov*, Moskva, Molodaja Gvardija, 2011.

²⁰ Nemirovskij, *Ivan Fedorov okolo 1510-1583*, cit., p. 35.

²¹ *Ibid.*, pp. 19-20.

²² See the chapter *Programmi e metodi d'insegnamento della scuola umanistica*, in R. Sani, *Educazione e istituzioni scolastiche nell'Italia moderna (Sec. XV-XIX). Testi e documenti*, cit., pp. 348-378.

from the point of view of content and language²³. Maksim also owed several so-called 'Aldine' – books in Greek, printed in Venice by Aldo Manuzio and recognizable by their dolphin printer's mark – and other printed books from the Bissoli and Manghi Milan printers²⁴.

During his stay in Kraków, Fedorov worked (with Mathieja Sharfenberger and Ironim Vietor) in Florian Ungler's printing shop, where the first *Psaltyr* in Latin-Polish was published in 1539 under the patronage of the Kraków *voevoda*, Petr Kmit (1477-1553). As well as learning the printing craft, Fedorov drew up the ornaments and learned embossing and woodcut printing. During his time in Kraków he met a number of people who had a particular influence on his education, most prominent of which were the humanist Francysk Skarina and the printer Schveipolt Fiol²⁵. Francysk Skaryna received his bachelor degree in Kraków and the title of doctor of medicine in Padua in 1512. In 1517 he was active in Prague where he published the first *Didactic Psaltyr* and over the following two years, 19 different richly illustrated editions of the Books of the Bible in Slavonic. Later he moved to Vilnius and in 1525 he published the *Apostol* and the *Malaja Prodrozhnaja Knizhica* (whose were parts *Psaltyr*, *Chasoslovec*, 8 *akafisti*, 9 *kanony*, *Shestonevec* and *Sobornik*), continuing the work he had begun in Prague²⁶.

In Kraków Fedorov discovered the printed works in Old Church Slavonic with Cyrillic types by Schveipolt Fiol (1460-1525/6), a German master-tradesman who had moved from Neustadt to Kraków in 1479, famous for his workmanship. In Kraków, he embroidered fabric with gold and silver thread, and also invented a device for pumping water out of mines. He became a printer and, two years of printing activity after, was arrested by the Inquisition in 1491; he left the country two years later and went back to Kraków where he died three years before Fedorov's arrival. Fiol asked an apprentice to produce Russian type in order to print *Triods* in Church Slavonic to meet a special order which had arrived from Moscow²⁷. His editions were characteristic: he numbered his pages recto and verso, with Cyrillic numeration; the numerous overlinear signs were set separately from the letters (also typical of Fedorov's editions) and his printing process used double lamination of a single matrix, a technique also adopted by the Muscovite printers²⁸.

²³ Nemirovskij, *Ivan Fedorov okolo 1510-1583*, cit., p. 33.

²⁴ *Ibid.*, pp. 39-40.

²⁵ *Ibid.*, p. 33.

²⁶ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., p. 45.

²⁷ *Ibid.*, pp. 41-42, 81; *Ivan Fedorov's Primer of 1574*, with commentary by Roman Jakobson and appendix by William A. Jakobson. Published under the auspices of the Harvard College Library and the Department of Slavic Languages and Literatures of Harvard University with the assistance of the Committee for the promotion of Advanced Slavic Cultural Studies, Cambridge Mass, 1955, p. 9.

²⁸ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., pp. 21-23, 41.

Back in Moscow, Ivan Fedorov became the deacon of the Church of Saint Nikolas of Gostun the Miraculous, which had existed in Kreml since the end of the XV century in the quarter populated by Greeks, Bulgarian and Serbs who had emigrated to Moscow after the Fall of the Bizantine Empire²⁹. He kept up his contacts with Kraków; it is reasonable to assume that the printing press and type used in Moscow had been imported from Poland³⁰. Fedorov initially made use of the experience of the smelters who worked in the Cannon Palace (*Pushechnyj Dvor*) to produce the first movable type-face characters in Moscow. Compared to the traditional style of Russian printing produced with moulds, the new technique involved pressing colored relief matrices onto paper, a technique transferred from the production of patterned fabrics from plates resembling those used in xylography. A printer in the Rus' Prince's Palace in Kiev used the old technique. The paper used was produced in Russia, the first paper mill having been opened in L'vov in the time of Fanzisk Skaryna³¹.

Fedorov began his activity in the Moscow typography, and in the period 1550-1560, he printed two copies of the *Four Gospels* (*Chetveroevangelie* with narrow and wide-set type), the two *Triods* (*Postnaja* and colored, a sort of Orthodox calendar) and the *Psalters* (*Psaltyr*) with wide-set type. Fedorov collaborated in particular to the printing of the *Four Gospels* with narrow type; in general, the printing style was indicative of the fact that the text was composed by inexperienced printers³².

Successively, on orders of the Tsar, a State Printing House (*Pечатnyj Dvor*) was opened in central quarter of Kitaj-gorod, where in 1564 Fedorov printed the *Apostle* (*Apostol*) with the frontispiece showing the apostle Luke (using a wood-cut engraving); 61 copies still exist, including later editions. With his apprentice Petr Mstislavec, Fedorov published a second book, *Book of Hours* (*Chasovnik*), in October 1565, as a quarto edition in 16³³.

After the printing of this work, both Fedorov and Mstislavec were forced to leave Moscow for Zabłudów (in the western part of Byelorussia, not far from Belostok); some believe that they were fearful of falling victim to the Tsar's repression (Fedorov was tied to prince Kurbskij) or due to rivalry between printers; yet other sources suggest that the move came after Fedorov had lost his wife and, in any case, he had been invited by the lord of Vilenskij, the *hetman* of the Great Princedom of Lithuania. The two Moscow printers founded a printing shop there where they published the *Commentaries on the Gospel* (*Evangelie uchitel'noe*) on March 17th 1569³⁴.

²⁹ Nemirovskij, *Ivan Fedorov okolo 1510-1583*, cit., p. 22; Liechtenhan, *Les trois christianismes et la Russie*, cit., p. 23.

³⁰ *Ibid.*, p. 22.

³¹ Nemirovskij, *Ivan Fedorov okolo 1510-1583*, cit., pp. 51, 54-55.

³² *Ibid.*, pp. 62-63, 66.

³³ *Ibid.*, p. 98.

³⁴ *Ibid.*, pp. 111-113.

The apprentice then left Fedorov and went to Vilnius. Mstislavec opened another printing shop where he printed the Four Gospels (*Chetveroevangelie*, 1575) and the *Psalter* (*Psaltyr*, 1576), while Fedorov published the *Psaltyr with Book of Hours* (*Psaltyr s Chasoslovcem*) in 1570. While living in Zabłudów, Fedorov had the opportunity to meet the promoter of the Calvinist reform, Simon Budnyj (1530-1593), in whose printing shop the *Katechizis* and the *Bibbia* were printed in 1562. These books were printed at the time when Protestantism was spreading amongst the Byelorussian and Lithuanian nobility, pushing for the political and economic independence of the Great Principality of Lithuania from Poland³⁵.

Probably for fear of losing of his new-found political support, Fedorov moved to L'vov in the second half of 1572, together with Grin' Ivanovich, an engraver, which was then under the protection of the future King of Poland, Henri III Valois, who occupied the throne for a few months³⁶. In L'vov – the Ukrainian centre of Galicia, a city was peopled by Ukrainians, Poles, Germans, Armenians, Jews, Tatars and Greeks – there were several printing shops and their craftsmen had formed guilds. The technique of printing colored illustrations on different surfaces was already known to them. The market for books was good here, and Fedorov's son became a bookbinder. Initially, Fedorov was unable to find a sponsor for his activities because the city's magnates were occupied with the reconstruction of the buildings destroyed by the 1571 fire. The Greek colony, however, was prosperous and the cotton merchant Konstantin Kornjakt (1517-1603) offered Fedorov financial support for the printing of the first Ukrainian book, the *Apostle*, in 1574 (a copy of the Moscow editions, totaling 280 pages). Semen Sedljar, a man fond of Greek culture, lent Fedorov 700 *zolytye* and helped him to get paper from the Krakovian paper mills. At the same time the first *Azbuka* (*ABC-book*, or primer) in the Cyrillic alphabet was printed in 1574, in Old Church Slavonic³⁷.

Fedorov's pilgrimage did not end in L'vov. At the beginning of 1575, he left the city and moved to Ostrog in Volynija, having been invited by Konstantin of Ostrog, a prominent patron of the new humanism. Ostrog was the commercial center of the Volynija Principality which, at the beginning of the 16th century, included 68 towns. From 1578 to 1581, Fedorov's new printing shop published five editions of the *Bible* – a masterpiece of Russian printing –, *Andrej Rymshi's chronology* (1580-1581) and, finally, new editions of the *Azbuka* between 1578 and 1580³⁸. Thanks to his patrons the Prince of Ostrog, and Andrej

³⁵ *Ibid.*, pp. 120-121.

³⁶ Henri III left Poland in June 1574 and became King of France and after two years Stephan Batory (1533-1586) succeeded him, *Ibid.*, p. 137.

³⁷ *Ibid.*, p. 141.

³⁸ M.B. Botvinnik, «*Azbuka*» Ivana Fedorova – *Istochnik prosveshchenija vostochnoslavjanskich narodov v XVI-XVIIvv*, in V.I. Marchel', V.V. Bilevich (edd.), *Iz istorii knigi, bibliotechnogo dela i bibliografii v Belorussii*, Moskva, Nauka i tehnika, 1970, pp. 150-167 (pp. 155-156).

M. Kurbskij (1528-1583), who had also fled Moscow, Fedorov undertook a major translation project from Greek into Old Church Slavonic with the aim of offering Orthodoxy texts regarding its origins which risked obliteration with the Fall of the Byzantine Empire, the result of which would have been to break important historical ties for the identity of the tsarist monarchy and of the Mythic identity of Moscow as the Third Rome. He translated the works of the Syrian presbyter and theologian John of Damascus, the bishop of Constantinople Saint John Chrisostomos, and the bishop and theologian Basil the Great. Under the protection of the Prince of Ostrog, Fedorov first printed a new edition of the *Azbuka* then the *Knizhka sobranie veshchej nuzhnejshchich* – a sort of dictionary for the *New Testament* composed by his apprentice³⁹.

Ivan Fedorov was forced to leave Ostrog. He returned to L'vov, where he died, leaving a strong cultural heritage because his apprentices continued his printing activities in all the towns where he had worked. After his death, other primers were published by his pupils in Ostrog, the most famous of which was the one published by V. Burcov-Protopovich in 1634. Fedorov's *Azbuka* was reprinted several times in Vilnius and Moscow with some changes. According to the detailed (and updated) reconstruction by the specialist Nemirovskij, some reprints of the editions of the *Azbuka* of 1574 and of 1578 have been preserved, and these have been the object of detailed linguistic and philological investigations⁴⁰.

2. *The Azbuka of L'vov of 1574: the first primer in Old Church Slavonic*

When Ivan Fedorov printed his primer in Old Church Slavonic, he was all too familiar with the German Lübeck Primer of 1565 (preserved by the Russian National Library of Moscow). The printing was done at L'vov, in a land that was part of the jurisdiction of the Polish-Lithuanian Kingdom, where these manuals had been in circulation since the second half of the sixteenth century⁴¹. Compared to the other Slavonic printed spelling books (Polish, 1512-1515, Czech, 1535, Slovenian, 1555 and Croatian 1561), Fedorov's one appeared

³⁹ Nemirovskij, *Ivan Fedorov okolo 1510-1583*, cit., pp. 156-158, 163-164.

⁴⁰ The National Library of Sofia "Kirill i Metodij" owns an undated reprint edition of the *Azbuka* of 1574, printed in Ostrog by I. Fedorov's pupil-apprentices in the years 1590; the Bodleian Library (Oxford) owns a reprint edition of the *Azbuka* del 1578 published in Vilnius or Ostrog by the pupils in 1593-1601 and the Library of the Trinity College of Cambridge owns another undated version, edited by the apprentice-pupils in the years 1580. Also the *Azbuka* in the collection of the Nostiz counts (Prague) is a reprint edition of the *Azbuka* of 1578 by the pupil-apprentices printed in Ostrog, see Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., pp. 48-75.

⁴¹ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., p. 62.

later⁴². Had he not reacted to the Orthodox Church's move to educate the clergy, it would very probably have been delayed even further. As Max Okenfuss argues, children began to read at the age of six or seven and «the rigid sequence began with the bukvar' or primer, which normally had two parts, an azbuka of ABC, comparable to Western hornbooks, and a prayer book, a manual of devotionals and scripture for reading and memorization. The primer was followed invariably by the *Book of Hours* (Breviary, Chasovnik), the Books of Psalms (Palter', Psalmyr'), and by the Acts of Apostles and the Gospels»⁴³.

Fedorov arrived in L'vov in the second half of 1572. In 1574, at the same time as the *Apostle*, Fedorov printed the *Azbuka*, the first Russian primer in Cyrillic and in Old Church Slavonic. The *Azbuka* is an octavo edition in 5 quires, comprising a total of 40 pages (80 sides). The pages measure 157x100mm (6¼ x 4¼ inches). This volume has no page numeration (*foljacija*) or signature (*signatura*). Fedorov used the same type-faces in his printing as he had used in Moscow and in Zabłudów; he also used typographical ornaments – five background images (*zastavki*), three final flourishes and two little engravings representing the L'vov coat of arms and Ivan Fedorov's printer's mark. The printing is monochrome, with no vermilion⁴⁴.

Fedorov's Primer was not merely a speller. In addition to the Primer *per se*, it also included a section on grammar and a selection of readings with an educational purpose, intended to be memorized (and featuring in prayer-books previously printed in Moscow). The Primer presented the texts in order of difficulty, and paid particular attention to the parts destined for memorization that Fedorov had inserted in order to consolidate reading skills.

On the first page of the *Azbuka*, the 45 letters of the Cyrillic alphabet are shown with some of their variant forms; the verso of the first page presents the alphabet in reverse order⁴⁵. On the lower part of the second page, the signs of the alphabets are laid out in eight columns (five letters in each column), totaling 40 letters. If the letters are read horizontally, they appear in a free order which, according to Ivan Fedorov, is intended to teach children to recognize the letters. The primer then presents the alphabet through the combination of different consonants with vowels in syllables of two letters (pp. 2r.-4v.): ба (ba), ra (ga), да (da), бе (be), ге (ge), де (de), then combinations of three syllables: бре (bre), вре (vre), гре (gre) to ща (shcha). This way of presenting syllables, which went back to the method used to teach Greek, indicated the adoption of the syllabic

⁴² *Ivan Fedorov's Primer of 1574*, with commentary by Roman Jakobson and appendix by William A. Jakobson. Published under the auspices of the Harvard College Library and the Department of Slavic Languages and Literatures of Harvard University with the assistance of the Committee for the promotion of Advanced Slavic Cultural Studies, Cambridge Mass, 1955, pp. 45 (facs.), p. 7.

⁴³ Okenfuss, *The discovery of Childhood in Russia*, cit., p. 8.

⁴⁴ Nemirovskij, *Ivan Fedorov okolo 1510-1583*, cit., p. 153.

⁴⁵ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., pp. 57-66.

method for the teaching of reading skills used for ancient Russian (there are traces in the XIII century birch barks found in Novgorod). Nevertheless, Fedorov strove to improve this method which was used throughout Russia, Byelorussia and Ukraine, by joining consonants and vowels⁴⁶.

From the fifth page the Primer presents the grammar in the eight parts of discourse according to the subdivision made by John of Damascus (some scholars claim that this subdivision dates to the 10th century). The 27 examples of verb conjugations are presented in groups in alphabetical order and laid out consecutively (pp. 5r.-9v.), with and without prepositions (drawn from John of Damascus). Fedorov wanted his pupils to repeat the alphabetic order in eight forms, following the unusual and complex forms of Old Church Slavonic. The following section «On prosody» concerns the accenting of Slavonic and Old Russian hand-writing and again here the examples are presented in alphabetical order. Twenty-two pages (12r.-22v.) are dedicated to orthography. This part deals with the declination of nouns and adjectives and the spelling patterns of the declinations; in this case too the examples are presented in alphabetical order and in abbreviated form. Fedorov drew on the heritage of the Slavonic volumes (including *The book of Costantine the Philosopher*, compiled in Serbia by Constantine the Grammarian in the first half of the XV century) from which he borrowed both the reverse and mixed alphabetical order and the alphabet in 8-9 vertical columns⁴⁷.

The second part of the *Azbuka* includes texts for consolidating and developing reading and writing skills. This part begins with the *tolkovaja azbuka* (alphabetical prayer, in Russian *azbuchnaja molitva*) (pp. 23r.-24v.)⁴⁸ i.e. the prayers that begin with the letters set in alphabetic order in a very similar way to the acrostics of the Old Testament (although the translation does not retain the alphabetical sequence)⁴⁹.

In the margins of pages 1r.-24v., the alphabetic letters are presented under abbreviations (*titli*) that indicated the numerals according to Cyrillic numeration in the Slavic countries of Ancient Russia: this seems to be a form of paragraph numbering. The presentation of the numbers from 1 to 100, then 200, 300, 400, 500, goes back to a method of Byzantine origin which was considered appropriate for the pupils of the *Brotherhood schools*, who were instructed by their teacher. Pages 25r.-39v. present the more complicated texts of the prayers, from the simple *Our Father*, to facilitate the memorization of reading skills. Following on from this, on pages 26v. and 28r. are the Symbol of Faith in the traditional compilation of the Slavic *Chasovniki* and *Chasloslov* (*Books*

⁴⁶ Botvinnik, «*Azbuka*» *Ivana Fedorova – Istochnik prosveshchenija*, cit., pp. 158, 160.

⁴⁷ *Ibid.*, cit., p. 165.

⁴⁸ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., pp. 61-62.

⁴⁹ These primers diffused themselves both in Latin and in Greek, mostly after the peace of Constantine, as demonstrated by P. Marone, *Gli antichi abecedari cristiani*, Roma, Edizioni Viverein, 2008, pp. 5-12.

of *Hours* and *Horologion*) with the dogma of the Orthodox faith (the text corresponds to the version approved by the first Council with the additions from the second Council of Constantinople in 381); it is followed by the Vespers and the other prayers⁵⁰.

The elementary reading course finished with the prayers of Basil the Great and Manasius King of the Jews which were part of the so-called *Great Vespers* (*Povecherie*) and were normally printed in the *Chasovniki* and *Chasoslovcy*. These prayers were also presented in the *Chasovniki* printed by Ivan Fedorov and his pupil Petr Mstilasvec in Moscow in 1565, and by Ivan Fedorov in Zabłudów (*Psalter with Book of Hours, Psaltry s Chasoslovcem*, 1570). The *Azbuka* of 1574 ends with Old Testament texts from Solomon's book of proverbs (from the 22nd proverb on the importance of literacy, from the second text of the 22nd, from the 23rd with its moral content, and from the 24th «science is like honey») and principles from 232, 258 and 273 of the *Letters of the Apostles* (*Poslanija Apostolov*), in particular from the Acts of Paul (Epistles to the Ephesians and to the Colossians) on children's obedience and the necessity of punishment, with a final invitation to console the weak in spirit. These texts constitute a proper Orthodox pedagogy (according to the scholar M.N. Tichomirov), presented as advice for parents, teachers and pupils (pp. 35r.-39v.)⁵¹.

In the part about sermons to the pupils, Ivan Fedorov set out the fundamental educational values such as love for one's fellow man, honesty, charity for orphans, capacity to listen, and the wisdom contained in Solomon's 22nd proverb⁵². According to the Soviet scholar Botvinnik, teachers and parents could punish children for disobedience «pedagogically but not tyrannically» (pp. 69r.-78v.), echoing in several respects the articles in the statute of the *Brotherhood school* of L'vov, that, in turn, referred to article 36 of the *Stoglav*, «On the punishment of one's own children» (*O nakazanii chad svoich*): they preferred persuasion and attentive explanation of the need for mutual respect of parents and children to cruel punishments⁵³.

The *Azbuka* recommended that parents educate their children in the Christian faith and that children listen to the words of the wise, learn with the heart, tell the truth and respect their parents; reading was a good thing for children who should always obey their parents. Reflecting the *Domostroj* (*Domestic Order*)'s⁵⁴ principles, Fedorov attributed a considerable educational responsibility to the father, who could, nevertheless, also punish children, rationally, because punishment was not completely banned from educational methods⁵⁵. Furthermore, «the parents must teach them to fear God, must

⁵⁰ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., pp. 61-62.

⁵¹ *Ibid.*, p. 62.

⁵² *Ibid.*, p. 63.

⁵³ Emchenko, *Stoglav. Issledovanie i tekst*, cit., p. 299.

⁵⁴ *The Domostroi*, cit., pp. 92-93, 95-110.

⁵⁵ *Ibid.*, pp. 93-94; Okenfuss, *The discovery of Childhood in Russia*, cit., pp. 16, 31.

instruct them in wisdom and all form of piety. According to the Child's abilities and age, and to the time available, the mother should teach her daughters female crafts and the father should teach his sons whatever trade they can learn. God gives each person some capacity [...]. Fathers must guard and protect their children, keeping them chaste and free from every sin, just as the eyelid guards the pupils and as though these were their own souls. For if children sin because of their father's and mother's carelessness, the parents must give answer for sins on Judgment Day»⁵⁶. Corporal punishment, which was admitted in schools, through rod, cane and the scourge, was also permitted by the other *Azbuki* of the seventeenth and eighteenth centuries, in particular by Vasili Burcov, who was in close contact with Byelorussian and Ukrainian printers. His Primer begins with an image of a pupil kneeling in front of the teacher who was on the point of punishing him with the cane and this image was maintained in Simeon Polotskij's *Azbuka* (1679)⁵⁷.

The hypothesis that the structure of the *Azbuka*, containing both the grammar and the rhetoric of Solomon's proverbs, should offer a smattering of the *Trivium* is quite risky because numerous elements are missing for the confirmation. According to the Soviet scholar Botvinnik, Fedorov was influenced by the humanist Francysk Skaryna, from Polack and secretary to Jan Kremeneck, bishop of Vilensk, third city of the Great Principality of Lithuania. Skaryna proposed studying the liberal arts from the Bible: the grammar from the *Psaltyr*, logic (dialectic) from the book of Jonah or from the Acts of the Apostle Paul, rhetoric from Solomon's proverbs, arithmetic, geometry, astronomy and music from the other Holy Books in an attempt to unite humanism with the Bible⁵⁸. Although these disciplines could be considered as the *Trivium* and *Quadrivium*, according to the Russian Fedorov specialist Nemirovskij, Fedor distanced himself from Skaryna because of the inclination towards Protestantism of the latter⁵⁹.

It could be added that the teaching of the liberal arts in Russia had not penetrated though Constantinople's schools⁶⁰, where the liberal arts (the *Trivium* and the *Quadrivium*) were taught even in the IV century. Very probably, through Skaryna's and Fedorov's printing activity, the classical and Orthodox cultures merged in central and eastern Europe before the spread of the Jesuit

⁵⁶ *The Domostroi*, cit., p. 95.

⁵⁷ Botvinnik, «*Azbuka*» *Ivana Fedorova – Istochnik prosveshchenija*, cit., p. 162.

⁵⁸ In 1562 in Nesvizhe (actually region of Minsk) Simon Budnyj opened a new typography where were published the following books: *Katechizis e Opravdanie greshnoko cheloveka*. In Byelorussia between 1565 and 1570 Vasilij Tjapinskij's printed the *Evangelie* in Byelorussian, see Botvinnik, «*Azbuka*» *Ivana Fedorova – Istochnik prosveshchenija*, cit., pp. 150-167.

⁵⁹ Botvinnik, «*Azbuka*» *Ivana Fedorova – Istochnik prosveshchenija*, cit., pp. 155-156; Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., p. 45.

⁶⁰ A. Tihon, *L'enseignement à Constantinople (IV^e-XII^e siècle)*, in É. Vallet, S. Aube, T. Kouamé (edd.), *Lumières de la sagesse. Écoles médiévales d'Orient et d'Occident*, Paris, Publications de la Sorbonne-Institut du monde arabe, 2013, pp. 43-49.

colleges for the education of youth: Fedorov's primers were included in Jesuits's list of forbidden books. Nevertheless, the structure of their college influenced the *Orthodox Brotherhood schools*⁶¹. However, the spread of Skaryna's *Bible* and *Apostle* within the Orthodox populations of Byelorussia, Ukraine, Russia and Lithuania was so considerable that the Soviet scholar V.I. Luk'janenko called it «a coincidence of the construction of phrases, which characterized the compilation of both works». Indeed, Fedorov transposed the text of Solomon's proverbs of Skaryna's Russian *Bible* and rearranged it in a more adequate way from the point of view of children's education. Very probably, Fedorov also used Skaryna's 1525 edition of the *Apostle*⁶².

Leaving aside the Soviet interpretation that saw in Fedorov an early opposition to the Jesuit's educational model, the publication of the *Azbuka* has to be placed in the context of the Ukrainian Pospolit's discourse about the spreading of literacy between population (see Ja. D. Isaevich). In 1572, the King granted L'vov's citizens the right to send their children to school to learn the liberal arts, and in 1574 the new King Henri of Valois confirmed this privilege⁶³. The first *Brotherhood school* was founded in 1586 in order to offer a program of liberal arts with an Orthodox slant, as an alternative to the Jesuit one⁶⁴.

Fedorov's *Azbuka* was a book for children – as Okenfuss argues – and influenced all the other East Slavic compilers for over a century, during which the number of printed primers in Moscow reached around the 300,000. «Brief, thirty-two primers (obtained by folding the printer's list four times) were typical in the Ukraine and Belorussia, where a more developed schooling was available, while more comprehensive editions appeared later in Moscow. The numerous western editions, published in Vilna, Mogilev, Kuterno and Lvov were relatively uniform in content and format»⁶⁵.

Before concluding the analysis of this *Azbuka*, it is interesting to follow its circulation that brought it so far from its place of publishing over the centuries. A copy of the original *Azbuka* fell into the hands of an Italian studying in L'vov, who brought it to Rome. It was purchased there by the collector S.P. Djagilev, who took it to Paris in 1927 (until that year only six books published by the Russian printer Fedorov were known about) and after some further changes of hands it passed to the Library of Harvard University, where the famous Russian linguist Roman Osipovich Jakobson (b. Moscow 1896 d. Cambridge, Mass. 1982) taught from 1949⁶⁶.

⁶¹ Botvinnik, «*Azbuka*» *Ivana Fedorova – Istochnik prosveshchenija*, cit., p. 157.

⁶² *Ibid.*, pp. 155-156.

⁶³ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., pp. 48-50, 56-66.

⁶⁴ E.N. Medynskij, *Bratskie shkoly Ukrainy i Belorussii v XVI-XVII vv. i ich rol' v vossoedinenij Ukrainy s Rossiej*, Moskva, 1954, pp. 125-132.

⁶⁵ Okenfuss, *The discovery of Childhood in Russia*, cit., pp. 11, 14.

⁶⁶ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., pp. 56-57.

Jakobson emigrated from Moscow to Prague at the beginning of the 1920s; from there he moved first to Sweden and to New York in 1941, by which time he was already considered a theoretician of the structural and functional analysis of language. He undertook the first of the *Azbuka* studies in 1955⁶⁷, presenting an initial in-depth analysis of the Primer's linguistic and philological characteristics. Some of his observations remain unsurpassed because he demonstrated the original sources quoted by Fedorov as his model and their linguistic variants⁶⁸. Jakobson analyzed the Primer mostly from the point of view of the history of Old Church Slavonic, highlighting the passages by the grammarian John of Damascus whom Fedorov quoted explicitly in his Primer's postface⁶⁹.

Among the aspects of the history of the language (variants of letters, characters rendering the phonemes and different conjugations of verbs influenced by the Russian adaptation of Donatus' Latin grammar) which the linguist pointed out, it is worth noticing the presentation of the alphabet in reverse order. As Jakobson argues «this procedure had been recommended as the second stage of learning in the treatise *O pis'menex* (Concerning letters) by Constantine, a Bulgarian grammarian at the Belgrade Court in the late fourteenth century, whose doctrine early penetrated to Russia. According to this method (...) the pupil had to repeat all the letters from beginning to the end and then in reverse from the end to the beginning, until they were firmly embedded in his memory and no longer stumbled; in departing from the habitual order the child was led to recognize the characters not from their place but from their shape. The terminology of Russian bookmen of the sixteenth century (...) distinguished the first stage of knowledge – *prostopojrjadie* (normal order) or *Azbuka*, and the second stage – *vspjatoslóvie* (reverse order). The other names for these two sequences were *v stremíni* (straight back). The third stage – *směs'noe poznánie* (complex knowledge) – consisted in dividing letters of the alphabet into five lines and writing them in columns, downwards, and in the pupil's reading them from left to right. This stage is presented in § 3 of the Primer (p. 2)»⁷⁰. Furthermore it is interesting to notice that «the final recapitulation of the alphabet in the Primer in an alphabetic acrostic, *Poznánie akrostixidnoe, sirěč granesý* (acrostic learning i.e., through verses) was considered an essential stage of instruction in Church Slavonic»⁷¹.

Furthermore, according to Jakobson's analysis, the *azbuka granica* (the latter word is derived from *grano* or *gran*, verse) is mentioned in a letter to the Metropolitan Simon, where the Novgorod Archbishop Gennadij refers to versified alphabet «and recommend that it be taught in school with an exhaustive

⁶⁷ *Ivan Fedorov's Primer of 1574*, cit., pp. 45 (facs.).

⁶⁸ Jakobson, *Ivan Fedorov's Primer*, *ibid.*, pp. 5-39.

⁶⁹ *Ibid.*, p. 13.

⁷⁰ *Ibid.*, p. 15.

⁷¹ *Ibid.*, p. 22.

exegesis because 'only when one masters the versified alphabet along with the words under sigla will one possess the great power of literacy' (...). Such an alphabetical acrostic was memorized and served as a mnemonic device for the firm retention of the alphabet»⁷². Indeed «early teaching, following upon the activities of Saint Constantine, confined the whole primer to an alphabetic acrostic, with the result that the words beginning the verse of a particular Old Church Slavonic poem singled out for acrostic became the spelling name of the letters»⁷³.

Jakobson's erudite research on Fedorov's primer spread to Russian specialists and subsequently M.N. Tichomorov denied information about the discovery of other copies of the Primer in Russia. He undertook a brilliant study which placed the printing of the *Azbuka* in the context of the printing of the first Cyrillic books, the *Osmoglasnik* and the *Chasoslov* by Scheipolt Fiol in Krakow in 1491. Some years later, one book was printed in Cyrillic in Venice, Cetinje and Chernogorie (1493-1495)⁷⁴. Around 2000 copies of this *Azbuka* were printed⁷⁵, a very high number in comparison with, for example, the *Psaltyrs* printed in the Italian peninsula, and this quantity has meant that a greater number of Russian primers have been preserved over time. A second copy of the Primer of 1574 was purchased by the British Library in 1982, and was bound with the *Azbuka* of 1637 edited in Burcov-Protopopov's typography in Moscow. It was purchased by Lord John Hebdon, who gifted it to a craftsman George Hook and was bought in England during the XVII century⁷⁶.

3. *The bilingual Azbuka of Ostrog of 1578 in Old Church Slavonic and in Greek: the failure of the unification of the Catholic and Orthodox Churches*

Fedorov undertook the printing of a second primer in Ostrog (Volynija) four years later, in 1578; a copy is preserved in the Landesbibliothek in Gotha. It was probably Fedorov himself who donated a copy to the German humanist Elija Gutter during his stay in Dresden⁷⁷.

⁷² *Ibid.*, p. 22.

⁷³ *Ibid.*

⁷⁴ M.N. Tichomorov, *Nachalo knigopechatanija v Rossii*, in M.N. Tichomorov, A.A. Sidorova, A.I. Nazarova (edd.), *U istokov russkogo knigopechatanija*, Moskva, Izdatel'stvo Akademii Nauk SSSR, 1959, pp. 9-40.

⁷⁵ Agadzhanov, *Sozdateli pervykh uchebnykh knig dlja nachal'nogo obuchenija gramote*, cit., p. 54.

⁷⁶ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., p. 57; Thomas, *Two East Slavonic Primers: Lvov, 1574 and Moscow, 1637*, cit., pp. 39-46.

⁷⁷ The 1578 Ostrog Primer is held at the Landesbibliothek in Gotha, see H. Grasshoff, J.S. Simmons (edd.), *Ivan Fedorov griechisch russisch/Kirchenslawisches Lesebuch von 1578 und der Gothaer Bukvar' vom 1578/1580*, mit einem Beitrag vom H. Claus, Berlin Akademie Verlag,

The *Azbuka* is not merely a corrected and expanded edition of the 1574 edition; it reflects a profound change in its educational model because it is bilingual (in Old Church Slavonic and in Greek). Its format is that of an octavo edition formed of 7 quires of 4, 6 or 8 leaves, with a total of 58 leaves (108 printed sides); the composition of quires 2-3 is similar to that of quires 1-3 of the 1574 edition. The text layout is different to that used in the first primer (where there were one or two columns). Six different typefaces (4 Slavonic, 2 Greek) were used in this primer. According to some scholars, the lower-case letters have corresponding upper-case letters of the same size (87 mm/3½ inches), influenced by the handwriting of Ukrainian manuscripts, although this argument has not been fully accepted in the way that the origin of the Greek type has⁷⁸.

In comparison to the first *Azbuka*, the *Azbuka* of 1578 had two alphabets, Greek and Slavonic presented in parallel, text in Greek and Slavonic presented in parallel, extracts for the moral education from the Holy Book and the *The Legend of how Saint Cyril created the alphabet of the Slavonic language and translated books from Greek into Slavonic* (*Skazanie kako sostavi svjatoj Kirill Filosof Azbuku po jazyku sloven'sku i knigi prevedede ot grecheskich na sloven'skij jazyk*). The learning of the Greek alphabet and of the parallel text in Greek and Old Church Slavonic (ll. 1-16) fully corresponded to Cyril's purpose: having created the Slavonic alphabet, he gave precedence to this method for the learning of languages⁷⁹.

Compared to the *Azbuka* of 1574, destined for the learning of Old Church Slavonic in the Orthodox schools of Russia, Byelorussia, Ukraine and Lithuania, the Ostrog primer was to have the learning of Greek as its basis, in accordance with the wishes of the Prince of Ostrog. Indeed, under the protection of Prince Konstantin, the cultural life of Ostrog was flourishing: there was a school, a printing shop, and a library. The school took an active part in the preparation of the different publication editions⁸⁰.

The Ostrog *Azbuka* contains the Slavonic alphabet, syllables of two or three letters and a fairly detailed grammatical section (ll. 17-60). In this edition the acrostic for the study of the alphabet is absent, while the format of the reading with moral content is virtually identical; this part also includes the prayers and the Articles of Faith, and extracts from the Old and New Testaments (ll. 61-90)⁸¹. The first part of the *Azbuka* is an educational tool for pupils studying Greek and begins with the 24 letters in alphabetical order, followed by ten lines with the definition of each individual letter. In pp. 2r.-8v. the texts are

1969. A copy of the same *Azbuka* of 1578, printed in 1580-81, is held at the Royal Library of Denmark in Copenhagen.

⁷⁸ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., pp. 69-70.

⁷⁹ Botvinnik, «*Azbuka*» *Ivana Fedorova – Istochnik prosveshchenija*, cit., p. 164.

⁸⁰ *Ibid.*, pp. 164-165.

⁸¹ *Ibid.*

presented in parallel, Greek and Cyrillic, in two columns. The *Azbuka* begins with a section entitled «Start of reading passages for children who want to learn to read and write». The last leaf ends with the orthography (p. 30). An alphabetical prayer (*azbuchanaja molitva*) is presented on pages 31r.-32v., as in the 1574 edition. Quires 5 and 6 are identical, featuring the texts for the learning of writing (ll. 33-47). Like the 1574 primer, there is no page numbering (*foljacija*) or signature (*signatura*).

In the second part of the book there are texts which had already been used in the part in Greek and Cyrillic, but with some differences that concern, amongst other things, the subdivision of the Symbol of Faith of the I and II Council of Constantinople (which was normally absent in the Greek-Slavonic texts). Some scholars have argued that this primer is a 3/4 copy of the 1574 one, because in the last part of the text there are some insignificant changes and additions (including the rather old system of lowering the kerning on numerals). The part which comprises the second quire up to leaf 30 was entrusted to one of Fedorov's apprentice, who made a number of typesetting errors. In the seventh quire (ll. 91-108) there is the well-known legend after the Old Bulgarian «O pis'menach» (*O pismenech Chernorizca Chrabra*) by Chernoric Chrabr (1348): the *The Legend of how Saint Cyril created the alphabet of the Slavonic language and translated books from Greek into Slavonic*⁸².

The presence of this text reflected an important political and religious policy. Chernoric Chrabr's text tried to demonstrate that the Cyrillic letters were 38, compared to the 24 Greek ones (although if accents and double-letters, the number remains the same) in an attempt to demonstrate the dignity of a language that could be used for the *Holy Books* and for the liturgy. Nevertheless, the presence of the Greek language was also a political choice, explicitly requested by Prince of Ostrog; although it is impossible to say exactly to what extent the bilingual primer might have calmed the diatribe raging at the time over which languages were to be considered holy, it is evident that the presence of Greek and Cyrillic would contribute to stymie attempts to unify the Catholic and Orthodox Churches⁸³.

In 1577, a year before the publication of the Ostrog Primer, the well-known Jesuit Piotr Skarga (1536-1612) and rector of the Vilnius had a work of his printed in the Prince of Ostrog's printing shop «On the union of God's Church under one pastor on about the Greek retreat from this union» (*O edinstve cerkvi Bozhej pod odnim pastryrem i o grecheskom ot tego edinstva otstuplenia*; in polnish *O jedności Kościoła Bożego pod jedynym pasterzem i o greckiem od tej jedności odtąpieniu*). In his treatise Skarga proposed the unity of Catholic and Orthodox churches. Describing Orthodoxy, he underlined the three discordances (*nestroenija*) and «in particular the married life of the clergy,

⁸² Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., pp. 70-73.

⁸³ *Ibid.*, p. 72.

the use of the Slavonic language in the liturgy, and the submission of the clergy to temporal power»⁸⁴. According to Skarga «there were only two languages, Greek and Latin, in which to spread faith in the world» and he continued that «as yet no academy or college existed in the world where theology, philosophy and the other liberal arts can be learned in another language and which they could be understood»⁸⁵.

It was from this consideration that Skarga derived his thesis that translating the Holy Book into living languages was an impossibility. Skarga attacked Ivan Fedorov's edition and those of other printers in Cyrillic, arguing that «There is nowhere and cannot be any erudite man who used Slavonic». Skarga proposed the translation of texts into Polish but not into Russian (based on Fedorov's primers) as had happened in Muscovy and Lithuania. For this reason, the presence of the *Legend* (*Skazanie*) was probably Fedorov's way of responding to Skarga and was the first move in «a particular beginning of a printed polemic» against the Jesuits, as the Ukrainian specialist V.V. Nimchuk points out. Indeed, according to the *Legend*, God had created neither Greek, nor Latin but Syrian, which was the language spoken by the first man Adam and his descendents, until God mixed the languages with the building of the Tower of Babel. At that time he subdivided knowledge and laws between peoples. Another argument in favour of Slavonic was that the Greek language had been created by pagans, while Cyrillic had been developed by Costantine the Philosopher, known as Cyril and his brother Methodius, bishop of Moravia in 855⁸⁶.

In this context it must be remembered that in this attempt to unify the Orthodox and Catholic churches, Skarga was assisted by the papal legate Antonio Possevino, who went specially to Russia on a peaceful mission⁸⁷. Possevino spoke of the school and the printing shop in Ostrog and went to Moscow in 1581-1582 as ambassador of Pope Gregory XIII with the mission of negotiating «a peace between Ivan and Stephan Bathory which would lead on to the alliance against the Ottomans Ivan was so keen on. But for it to be solid, it had to be agreed upon within the bounds of the Church. Let the Tsar read the decrees of the council of Florence, let him send new ambassadors to the Pope»⁸⁸.

Nevertheless, as the French scholar Francine-Dominique Liechtenhan states, «Ivan had no shortage of retorts: he was uninterested in Byzantium, his religion was not that of the Greeks (a simple matter of vocabulary, in his reasoning), but that of Christ. The glory of the Russian Church was revealed by the apostolate

⁸⁴ *Ibid.*

⁸⁵ *Ibid.*

⁸⁶ *Ibid.*, pp. 73-74.

⁸⁷ N. Brjan-Chaninov, *La Chiesa russa*, Vicenza, Edizioni Cristoferi, 1931, pp. 47-48; Liechtenhan, *Les trois christianismes et la Russie*, cit., pp. 44-47.

⁸⁸ de Madariaga, *Ivan the Terrible*, cit., p. 327.

of Saint Andrew in Novgorod and the baptism of the country by Vladimir»⁸⁹. In a book edited in Vilnius in 1586, Skarga wrote that the «Princes of Ostrog and Sluck have printing shops and schools who support the schism»⁹⁰, while he was active in trying to unite the Orthodox and Catholic Churches (the first meeting of the bishops took place in Brest in 1594), even though the separation was already definitive.

According to the Soviet scholar Botvinnik, the *Azbuka* actually matched the syllabus of the Ostrog school, whose elementary course was held in three languages in conformity with Cyril and Methodius' instructions⁹¹, a tendency which gained ground amongst a section of the clergy in the wake of the 1643 Schism up to the beginning of the following century⁹². As Okenfuss points out «In the religious competition with the Jesuits, the Orthodox churchmen who founded the brotherhood schools were anxious to circulate Scripture in Slavonic in their schools, and that the liturgical language remained a school subject beyond the introductory *analog* form»⁹³.

Indeed, during the seventeenth century the European classical grammar schools were introduced into Eastern Europe by Catholic and Orthodox communities: «the Latin grammar schools were the dominant educational institutions throughout Europe in the sixteenth and seventeenth century. Everywhere they produced clergymen and were carefully supervised by the local ecclesiastical establishment, but they were never closed theological seminars. [...] The struggle against Lutherans in the late sixteenth and early seventeenth centuries marked the spread of this latter type of institution into the East Slavic world, where they were quickly imitated by the Orthodox community. [...] Soviet Scholarship, anxious to deny any Jesuit influence which would lessen the Russianness of schools in the Ukraine, has emphasized that the Orthodox schools taught Slavonic, while the Jesuit schools taught Polish»⁹⁴.

In this perspective, according to the Botvinnik, Ivan Fedorov strove to break the monopoly of the Catholic clergy in the education of children because his primers were destined for use in the *Brotherhood schools* (*bratskie shkoly*). However, these schools, which were mainly located in Polish territory, were under the direct control of the Patriarch of Constantinople and the Metropol of Kiev. The *Kiev brotherhood school* was essentially an imitation of the Jesuit college⁹⁵; in Poland, Ukraine and Byelorussia, Greco-Latin *Orthodox*

⁸⁹ «Ivan ne manquait pas de repartie; il ne s'intéressait pas à Bizance, sa religion n'était pas celle des Grecs (une simple question de vocabulaire selon sa logique), mais celle du Christ. La grandeur de l'Église russe révélait de l'apostolat de saint André à Novgorod et du baptême du pays par Vladimir», see Liechtenhan, *Les trois christianisme et la Russie*, cit., pp. 44-47.

⁹⁰ Nemirovskij, *Ivan Fedorov i ego epocha. Enciklopedija*, cit., p. 70.

⁹¹ Botvinnik, «*Azbuka*» *Ivana Fedorova – Istochnik prosveshchenija*, cit., pp. 164.

⁹² Okenfuss, *The Jesuit Origins of Petrine Education*, cit., pp. 115.

⁹³ *Ibid.*, p. 112.

⁹⁴ *Ibid.*, pp. 111-112.

⁹⁵ *Ibid.*, p. 110.

brotherhood schools (*Bratskie shkoly*), boarding schools teaching the liberal arts, were widespread⁹⁶.

The *Azbuka* was used for the school which opened in Ostrog in 1588 near the cathedral of Vladimir. Its teachers of Greek and Old Church Slavonic were well-educated (bachelor degree or university education) and probably members of the literary circle headed by Kirill Lkanis, future Patriarch of Constantinople. The school was directed by Gerasim Danilovitch Smotrickij (father of the famous Meletej who studied in a Jesuit college and was author of an important grammar). Prince Konstantin of Ostrog provided the school with a stone-built building, leaving the wooden one as a dormitory for pupils. The nobility of Volynija also expressed the desire to educate their children, and the presence of the ancient Peresopnick Monastery played a fundamental role due to its library, which made it possible to offer an alternative form of education to the Jesuit colleges⁹⁷.

Conclusions

The comparison between Fedorov's two primers underlines an important evolution of Russian educational models during the second half of the 16th century. The publication of Fedorov's primers responded on the one hand to the need for Orthodox schools and the requirement to educate a literate clergy and, on the other, to the desire to break the Jesuit monopoly in education in the regions of Poland and Ukraine by offering an Orthodox educational model (which was openly condemned by the Jesuits themselves, who did not allow teaching in a Slavonic language⁹⁸).

The influence of Fedorov's primers is visible through the centuries but the evolution of the structure of primers during the 17th and 18th centuries shows traces of German influence – the denomination of the German *ABC-Buch* was also lost over the course of a century in Germany⁹⁹ – and of the process of laicization of the education that led to printing only in Russian and not in Old Church Slavonic, especially after the Great Schism of 1643, which

⁹⁶ *Ibid.*, p. 109.

⁹⁷ In 1504 this monastery passed to the prince Chartoryjsk, who collected a rich library and were related to the Polish-Russian nobles Zahorowskie. They opened a first school in Staryj Zagoriv in 1577, see Nemirovskij, *Ivan Fedorov okolo 1510-1583*, cit., p. 157. See also Okenfuss, *The Jesuits origins of Petrine Education*, cit., p. 109 and Agadzhanov, *Sozdatelu pervych uchebnych knig dlja nachal'nogo obuchenija gramote*, cit., p. 54.

⁹⁸ Botvinnik, «*Azbuka*» *Ivana Fedorova – Istochnik prosveshchenija*, cit., p. 157.

⁹⁹ G. Teisler, *Fibeln als Dokumente für die Entwicklung der Alphabetisierung: ihre Entstehung und Verbreitung bis 1850*, in H.E. Bödeker, E. Hinrichs (edd.), *Alphabetisierung und Literarisierung in Deutschland in der Frühen Neuzeit*, Tübingen, Max Niemeyer Verlag, pp. 255-281.

decreed that Latin was to be abandoned. In Germany, primers were small religious textbooks. «In addition to the letters of the alphabet they contained the *Kleinen-Kathechismus*, the *Vater-unser*, prayers, Bible texts and others which the children (or adults) should learn by heart. Here the origin of the concept which saw the ABC-book as a little Bible [...], «Fibel», should also be researched. The word *Fibel* is found as title of a reading book for the first time in Germany in 1632»¹⁰⁰.

In 17th century Germany *Primers for Catechism (Katechismus-Fibeln)* i.e. reading books which used texts drawn from the Bible to teach reading, were widespread. Only after Wolfgang Ratke's (or Ratichius) publication of the *Fibel Lesebüchlein für die angehende Jugend nach der Lehart Ratichi* (1519), and Comenius' *Orbis sensualium Pictus* (1658) did they undergo particular changes in their structure¹⁰¹.

In Russia too there was an important evolution which concerned the terms *Azbuka* and *Bukvar'*. Fedorov's first primer was called an *Azbuka*, while *Bukvar'* appeared as early as 1618 for M. Smotrickij's primer printed in Poland. As Gary Marker explains, «most of the recorded primers (39) came from Byelorussian and Ukrainian typographies; no Moscow imprint appeared until the publication of Vasilii Burtsov's *Azbuka* of 1634. Irrespective of the city of publication, the great majority of these texts (29) were identified as *bukvar'* in their titles. [...] Such a move toward the terminological uniformity of *bukvar'* in those regions reflects an emerging consistency, at least in pedagogical contents of the books, from one recorded printing to the next. Indeed, the vast majority of Byelorussian and Ukrainian primers followed the Fedorov model reasonably closely in terms of length (generally sixty to eighty-five pages) and pedagogical format and technique. [...] This model applied both to *azbuki* and *bukvari* published in Belorussia and the Ukraine, and to most of *Grammatiki*»¹⁰².

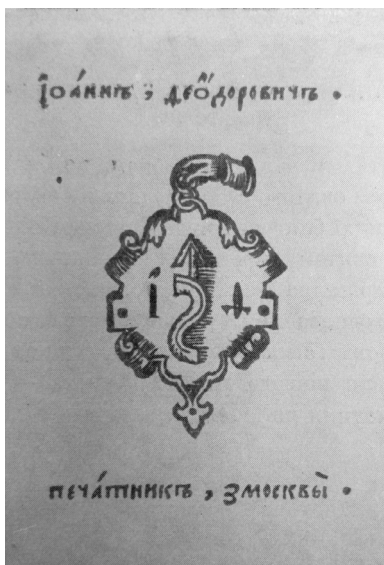
In this sense, the term *Bukvar'* was used after the Great Schism of 1643 in the context of the Nikonian reform, which had put an end to hopes to unify the Orthodox and Catholic Churches. The terms *Azbuka* and *Bukvar'* became synonymous after the language reform in 1710 because there were no longer tied to the debate that saw the promotion of Greek culture as being anti-Latin, in support of Old Slavonic grammar which was to be granted equal status with the other holy languages. Once it had achieved that status, the structure of primers changed because they were no longer required for religious education¹⁰³.

¹⁰⁰ *Ibid.*, p. 257.

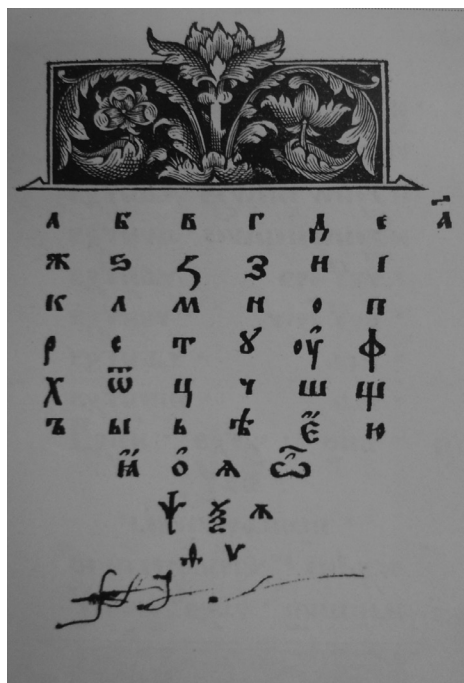
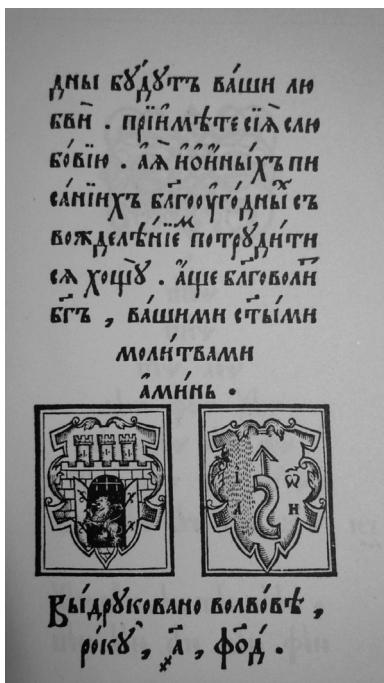
¹⁰¹ *Ibid.*, pp. 265-267.

¹⁰² Marker, *Primers and Literacy in Muscovy: A Taxonomic Investigation*, cit., pp. 4-5.

¹⁰³ Okenfuss, *The discovery of Childhood in Russia*, cit., pp. 43-48; Agadzhanov, *Sozdateli pervykh uchebnykh knig dlja nachal'nogo obuchenija gramote*, cit., p. 51.



Pic. 1 (on the left). *Ivan Fedorov's Printer Mark*, from M.N. Tichomorov, *Nachalo knigopechatanija v Rossii*, in M.N. Tichomorov, A.A. Sidorova, A.I. Nazarova (edd.), *U istokov russkogo knigopechatanija*, Moskva, Izdatel'stvo Akademii Nauk SSSR, 1959, p. 253.



Pics. 2-3. Pages of the primer of 1574, from *Ivan Fedorov's Primer of 1574*, with commentary by Roman Jakobson and appendix by William A. Jakobson. Published under the auspices of the Harvard College Library and the Department of Slavic Languages and Literatures of Harvard University with the assistance of the Committee for the promotion of Advanced Slavic Cultural Studies, Cambridge Mass, 1955, p. I and p. 79.

A manual for the young Tsar: Simeon Polotskii's primer

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ABSTRACT: The article examines the primer of the famous Baroque poet Simeon Polotskii, published in Moscow in 1679. The comparison with other primers demonstrates that Simeon Polotskii's primer is part of that group of basic traditional manuals that were widespread in the East Slavic territories during the 16th and 17th centuries. Simeon Polotskii's primer is distinguished by the presence of prose greetings, that is texts destined for declamation during festivities and official events. Greetings were part of a culture of rhetoric derived from a curriculum of study typical of Polish schools, where rhetoric and poetics were taught on the basis of Western models. Including greetings in the primer demonstrates the efforts of Simeon to introduce this culture at the court of the tsar and to define the basic education of the children in relation to Russian court life in the second half of the 17th century.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Primary education; Russia; XVII Century.

A particularly important aspect of the multifaceted activity and rich production of the famous Baroque poet Simeon Polotskii are undoubtedly his works in the fields of didactics and pedagogy, a valuable example of which is his primer, printed in Moscow in 1679.

Simeon Polotskii (whose real name is Samuil Gavrilovich Petrovskii-Sitnianovich; born in Polotsk in 1629 – died in Moscow in 1680)¹ completed

¹ For information and a bibliography of the life, activities and works of Simeon Polotskii, see: A.M. Panchenko, D.M. Bulanin, A.A. Romanova, *Simeon Polotskii*, in D.M. Bulanin (ed.), *Slovar' knizhnikov i knizhnosti Drevnei Rusi*, Vyp. 3 (XVII v.), Chast' 3 P-S, Sankt-Peterburg, Dmitrii Bulanin, 1998, pp. 362-379; D.M. Bulanin, *Bibliograficheskie dopolneniia k stat'iam pomeshchennym v «Slovar' knizhnikov i knizhnosti Drevnei Rusi» (Vyp. 3, Chasti 1-3)*, in D.M. Bulanin (ed.), *Slovar' knizhnikov i knizhnosti Drevnei Rusi*, Vyp. 3 (XVII v.), Chast' 4 T-IA. Dopolneniia, Sankt-Peterburg, Dmitrii Bulanin, 2004, pp. 790-793. For a more detailed treatment of Polotskii's contribution to Russian Baroque literature, see L.I. Sazonova, *Literaturnaia kul'tura*

his studies at the Kievan Mohyla College and probably also at the Jesuit Academia in Wilno, after which he began his teaching activity in Polotsk (in present-day Belarus) in 1656, at the school of the Orthodox confraternity at the Theophany Monastery, where he was also ordained. His teaching activities were fully realized in Moscow, where he moved permanently in 1664. There, with the support of Tsar Alexis (Aleksii Mikhailovich, 1645-1676), he taught subjects such as Latin, rhetoric and poetics for a brief time at the school at the Zaikonospasskii Monastery. He subsequently was charged with the education of the tsar's children, Alexis (1654-1670), Fyodor (1676-1682), as well as the young Peter (1682-1725), and with assessing whether the preparation and attitude of the clerk (*d'iak*) Nikita Zotov (? -1717) were such as to allow him to teach Peter².

In light of the above biographical data and the position Simeon Polotskii gained at court, it is undoubtedly of interest to analyze the primer he compiled and printed in Moscow, considering, on the one hand, its links with the manuals for basic education that were widespread in the East Slavic territories in the 16th and 17th centuries, and on the other its importance and role at the Russian court in the second half of the 17th century.

Simeon Polotskii's primer was printed in Moscow in 1679 when he was already an established court poet and author of greetings and panegyrics written for court events or religious celebrations. Unlike the publication of other books during that era, which were printed exclusively by the Moscow Printing House (*Moskovskii Pечатnyi Dvor*), which was under the control of the Patriarch, Simeon's primer was published by the Upper Typography (*Verkhniaia tipografia*); that is, the printing house that was inside the Kremlin and independent of patriarchal control. Five other works were printed by this printing house³, which was active from 1679 to 1683 and whose first publication was the primer. Among these other publications was the *Testament, or Teachings of the Greek Emperor Basil to his Son Leo the Wise* (*Testament, ili Zavět, Vasilia tsaria grecheskago, k synu ego Lvu filosofu*), published in 1680. In this regard it should be noted that in the East Slavic territories the *Testament* attributed to the Emperor Basil I enjoyed a certain amount of popularity, as

Rossii. Rannee Novoe vremia, Moskva, Iazyki slavianskikh kul'tur, 2006.

² For information on Nikita Zotov, see I. Zabelin, *Domashnii byt russkogo naroda v XVI i XVII st.* T.I. Chast' II. *Domashnii byt russkikh tsarei v XVI i XVII st.*, Moskva, Iazyki russkoi kul'tury, 2000, pp. 223-227 (reprinting of the 1915 edition); L. Hughes, *Russia in the Age of Peter the Great*, New Haven and London, Yale University Press, 1998, p. 423.

³ For information on the Upper Typography, see L.A. Chernaia, *Verkhniaia tipografia Simeona Polotskogo*, in A.N. Robinson (ed.), *Simeon Polotskii i ego knigoizdatel'skaia deiatel'nost'*, Moskva, «Nauka», 1982, pp. 46-59. On the editions of the Upper Typography, see A.A. Guseva, *Oformlenie izdaniĭ Simeona Polotskogo v Verkhnei tipografii (1679-1683 gg.)*, «Trudy Otdela drevnerusskoi literatury», T. XXXVIII: *Vzaimodeistvie drevnerusskoi literatury i izobrazitel'nogo iskusstva*, 1985, pp. 457-475.

demonstrated by the reprinting by the Upper Typography of the translation published around 1661-1663 by the Moscow Printing House⁴.

The reprinting of the *Testament*, a work which Simeon published with the intention of providing advice and indications for good government as well as for proper behavior, not only to the young Tsar Fyodor and the Tsarevich Peter but also to the simple reader, can be viewed as the continuation of the educational project began in 1679 with the primer. The *Testament* represented a sort of manual of behavior that complemented the primer; its reprinting was an attempt by Simeon to introduce at court a work which illustrated the characteristics of the ideal sovereign and had enjoyed great prestige and popularity in the previous centuries⁵.

Let us now examine Simeon Polotskii's primer in more detail in order to define more precisely the type of education and rudiments he wished to provide to the young readers, including in particular the Tsar Fyodor and Tsarevich Peter⁶.

The primer, printed in octavo and containing 160 leaves, is structured as follows: 1) *Preface for youth wishing to study (Predislovie k iunosham uchitisia khotiashchym)*; 2) *Blessings for youth who attend school to study the Sacred Scriptures (Blagosloveniiia otrokov vo uchilishche uchitisia sviashchennym pisaniiam idushchym)*⁷; 3) List of the letters in the alphabet; 4) List of syllables; 5) List of the names of the letters in the alphabet; 6) List in alphabetical order of abbreviations; 7) *Prayers (Tsariu nebesnyi, Otche nash, Simvol pravoslavnyiia věry etc.)*; 8) *Discourse on the Orthodox Faith with short questions and answers, in order to instill a better understanding in Christian children (Besēda o pravoslavnei věrē, kratkimi voprosy, i otvēty, udobnēishago radi poznaniia, dētem khristianskim)*; this is the *Exposition of the Orthodox Faith* by Stefan Zizanii); 9) *Ten Commandments, Six Perfections, Nine Beatitudes, Three Theological Virtues, etc.*; 10) Various prayers: *Prayers upon waking, Giving*

⁴ For more information on the editions of the *Testament* that preceded Simeon Polotskii's, see F.I. Setin, «*Testament*» v izdanii Simeona Polotskogo, in Robinson (ed.), *Simeon Polotskii i ego knigoizdatel'skaia deiatel'nost'*, cit., pp. 105-108.

⁵ Setin, «*Testament*» v izdanii Simeona Polotskogo, cit., p. 114.

⁶ On the title page of the primer there appears the following: *Primer in Slavic, or an initiation into study for children who wish to learn to read the Scriptures (Bukvar' iazyka slavenska, sirēch' nachalo ucheniia dētem, chotiashchym uchitisia chteniiu pisanii)*. This is a rather general title, common to other primers, such as those printed in Moscow in 1657, 1664, 1669, 1696. Regarding the 1679 primer, see I. Tatarskii, *Simeon Polotskii (ego zhizn' i deiatel'nost')*. *Opyt issledovaniia iz istorii prosveshcheniia i vnutrennei tserkovnoi zhizni vo vtoruiu polovinu XVII veka*, Moskva, Tipografia M.G. Volchaninova, 1886, pp. 244-251; M.J. Okenfuss, *The Discovery of Childhood in Russia. The Evidence of the Slavic Primer*, Newtonville, Massachusetts, Oriental Research Partners, 1980, pp. 19-21; F.I. Setin, «*Bukvari*» Simeona Polotskogo v riadu drevnerusskikh uchebnykh XVI-XVII vv., in Robinson (ed.), *Simeon Polotskii i ego knigoizdatel'skaia deiatel'nost'*, cit., pp. 93-104.

⁷ This is a *moleben*; that is, an appeal to God, the Saints or the Virgin during liturgical rites, with requests for intercession or giving thanks.

thanks after lunch, etc. (*Molitvy ot sna vostav, Blagodarenie po obědě*, etc.); 11) Prosody, numbers expressed with Cyrillic letters; 12) *Greetings for the Birth of Christ, for the Epiphany, for the Resurrection of Christ, for the Descent of the Holy Spirit, for the New Year* (*Privětstva na Rozhdestvo Khristovo, Na Bogoiavlenie, Na Voskresenie Khristovo, Na Soshestvie Sviatago Ducha, Na Novoe Lěto*); 13) *Exhortation* (*Uvěshchanie*; these are verses in praise of corporal punishment); 14) *On the faith, of the Holy Patriarch of Constantinople Genadii* (*Svjatago Genadia patriarkha konstantinopolskago, O věřě*).

A quick review of the content of the primers that appeared in the Eastern Slavic territories and in Moscow in the 17th century reveals that Simeon Polotskii's manual was part of a well-entrenched tradition, though naturally with some important peculiarities.

In particular, the critiques highlight the basic adherence to the model represented by the manual published by the Moscow Printing House in 1657, which, in turn, presents some novelties with respect to the model of the manual published by Ivan Fedorov (ca. 1510-1583) at Lviv in 1574 as well as to the primers published by Vasilii Burtsov (first half of 16th century) in 1634 and 1637 by the Moscow Printing House⁸.

⁸ The primer printed in Lviv by Ivan Fedorov in 1574 sets a standard model that would be fundamentally maintained for subsequent manuals, though with some changes. The manual contains a part with language material, useful for learning to read the liturgical books correctly (list of the letters of the alphabet and of the syllables, examples of verb conjugations for active and passive forms, prosody, spelling (a list in alphabetical order of abbreviations), and the acrostic alphabet) and a part with religious material containing prayers (*Za molitvu sviatykh ottsov nashikh, Tsariu nebesnii, Sviatii Bozhe, Otche nash, Ispovědanie pravoslavnynia věry*, etc.) and passages from Scriptures, followed by a brief afterword.

As regards instead the primer printed by Vasilii Burtsov, the 1637 edition contains a preface, didactic verses, an illustration of a school setting, language material (list of syllables, list of names for the letters in the alphabet, numbers expressed in Cyrillic letters, prosody, examples of verb conjugations for active and passive forms, spelling (list of abbreviations in alphabetical order), the acrostic alphabet), religious material (*Ten Commandments, Nine Beatitudes*, etc., Bible passages), and Chrabr's treatise entitled *Skazanie kako sostavi sviaty Kiril Filosof azbuku*. Vasilii Burtsov's 1637 primer reflects some innovations introduced in the manual printed by Spiridon Sobol' in 1631 at the Kutein typography housed in the Theophany Monastery in Orsha (in present-day Belarus) (M. Korzo, *Ukrainskaia i belorusskaia katekheticheskaia traditsiia kontsa XVI-XVIII vv.: stanovlenie, evoliutsiia i problema zaimstvovaniia*, Moskva, «Kanon+», 2007, pp. 541-548).

For information and a bibliography on the life and activities of Ivan Fedorov and Vasilii Burtsov, see: E.L. Nemirovskii, *Ivan Fedorov (Moskvitin)*, in D.S. Likhachev (ed.), *Slovar' knizhnikov i knizhnosti Drevnei Rusi*, Vyp. 2 (vtoraia polovina XIV-XVI v.), Chast' 1 A-K, Leningrad, «Nauka» Leningradskoe otdelenie, 1988, pp. 388-393; L.I. Sazonova, A.A. Guseva, *Burtsov Vasilii Fedorov*, in D.S. Likhachev (ed.), *Slovar' knizhnikov i knizhnosti Drevnei Rusi*, Vyp. 3 (XVII v.), Chast' 1 A-Z, Sankt-Peterburg, Dmitrii Bulanin, 1992, pp. 148-153.

For a classification of the primers published up until the 18th century, see R. Cleminson, *East Slavonic Primers to 1700*, «Australian Slavonic and East European Studies», vol. 2, n. 1, 1988, pp. 1-27.

Among these new features was less space devoted to linguistic aspects in favour of a greater focus on aspects dealing with religion and the catechism⁹. More specifically, the 1657 primer presents the *Exposition of the Orthodox Faith, with short questions and answers, in order to instill a better understanding in Christian children* (*Izlozhenie o pravoslavnoi věřě, kratkim voprosheniem, i otvëshchaniem, udobněishago radi poznaniia, dětem khristianskim*). The *Exposition* is in the form of a dialogue regarding the principles of the orthodox faith. It was compiled by the theologian and preacher Stefan Zizanii (ca. 1570-ca.1600) and is contained in the manual written by his brother, the pedagogue and translator Lavrentii Zizanii (fifties or sixties of 16th century-after 1634), entitled *Teachings regarding the reading and the understanding of the Slavic letters* (*Nauka ku chitanii, i rozuměniu pisma slovenskogo*), published in Wilno in 1596¹⁰. Simeon took up the *Exposition*, adding some changes that, among other things, softened its polemical tone¹¹.

The 1657 Moscow primer thus presents more material on religion and the catechism, which, moreover, is also partially found in the manual printed in Moscow in 1637 by Vasilii Burtsov¹².

Nevertheless, a comparison between the content in the 1657 manual and Simeon Polotskii's primer reveals some important differences, in particular the inclusion of verses, a preface and greetings, which are not in the 1657 primer, in addition to the passage on the proper positioning of the fingers of the hand in making the sign of the cross. In Simeon's manual this corresponds to the *Stoslovets*, that is, the treatise attributed to the patriarch of Constantinople, Gennadios, on Christian faith and morals¹³.

⁹ In comparison to Vasilii Burtsov's 1637 manual, the 1657 primer does not contain examples of verb conjugations, the acrostic alphabet and the numbers. However, included are prayers such as *Prayers upon waking, Morning prayer* (*Molitvy ot sna vostav, Molitva utreniaia*) etc. Also included is an excerpt from a letter by the ecumenical patriarch Paisii to the Russian patriarch Nikon on the correct way of positioning the fingers in making the sign of the cross (*Glavizny otvëshchatelny ot poslaniia Paisii arkhiepiskopa Konstantinopolia i vseenskago patriarkha, k sviatěishchemu rossiiskomu patriarkhu Nikonu, kiimi persty podobaet vsiakomu khristianinu na ličë svoem izobrazhati obraz kresta*), reflecting the recent religious reform introduced by the patriarch Nikon.

¹⁰ Lavrentii Zizanii also was the author of the *Slavonic grammar* (*Grammatika slovenska*), published in Wilno in 1596.

¹¹ Korzo, *Ukrainskaia i belorusskaia katekheticheskaia traditsiia kontsa XVI-XVIII vv.*, cit., pp. 549-552.

¹² *Ibid.*, p. 548.

¹³ The translation of this work was already known in Ancient Rus' in the 11th century. Two printed editions can be traced to the 17th century, without considering the edition contained in Simeon Polotskii's primer (O.V. Tvorogov, «*Stoslovets*» *Gennadiia*, in D.S. Likhachev (ed.), *Slovar' knizhnikov i knizhnosti Drevnei Rusi*, Vyp. 1 (XI- pervaiia polovina XIV v.), Leningrad, «Nauka» Leningradskoe otdelenie, 1987, pp. 448-449).

Let us now consider in more detail the preface, the verses on corporal punishment and the greetings found in Simeon Polotskii's primer, which partly differentiate it from the other contemporary basic education manuals.

As regards the preface, it should be noted that the manual printed by Vasilii Burtsov in 1637 contains a preface followed by didactic couplets. The preface, entitled *A Short Preface to This Small Primer for Initial Instruction* (*Predislovie vkratcě pervouchebnĕi sei malĕ knizhitsĕ azbutsĕ*), sets out the aims of the manual, which is intended to help illuminate the mind and to glorify God, and its role in the system of initial instruction, which, after the primer, entails the study of the *Book of Hours* (*Chasovnik*), the *Psalms* (*Psaltyr'*), and other books as well.

The verses are aimed at the students, inviting them to study and obey the teacher. They emphasize the need for young people to study in order to be honored in old age and, above all, to know the word of God:

This booklet [...] is written for you children regarding your studies. / You, wise child, pay attention to it. / And rise up from the lowest ranks to the highest. / And never study with indolence and carelessness [...]. If you learn as a child / You will be calm and honored in your old age. / And praised by all¹⁴.

The preface to Simeon Polotskii's primer is written in syllabic verses¹⁵ aimed at young people who intend to study, emphasizing the importance and usefulness of studying. As in the verses in Burtsov's primer, Simeon also states the need to study when young in order to gain respectability when older.

Simeon presents a series of arguments to demonstrate the importance of reading and writing, which allows one, for example, to express what the heart feels and the mind reflects, to spread the word of God, and to understand the sins that are committed and how these can be cleansed:

Oh young person, study from infancy, [...]
Do not be lazy in applying yourself to the task,
because it will turn out to be very useful to you.
If it does not seem pleasant to make that effort,
it nevertheless is sweet to harvest the fruits of your labor.
He who applies himself in his youth,
is in peace with himself in his old age. [...]

¹⁴ «Сия зримая малая книжица. / [...] Вам младым дѣтем к научению. / Ты же благоумное отроча сему внимай. / И от нижния степени на вышнюю восступай. / И не лѣность и не нерадивѣ всегда учися [...] аще научиши себе во младости. / То будет ти покой и честь во старости. / И тако хвалим будеши от всех.» ([Vasilii Burtsov], [*Azbuka*], Moskva, Pечатnyi Dvor, 1637, f. [1]/7^r-[1]/7^v, 2/1^r-2/1^v).

¹⁵ The syllabic verse, introduced into Russian Baroque poetry due to the influence of Polish poetry, was composed of a fixed number of syllables, which could number eight, eleven or thirteen. The rhyme among the verses was above all feminine (M.L. Gasparov, *Ocherk istorii russkogo stikha*, Moskva, «Fortuna Limited», 2000, pp. 31-32).

What the heart thinks and the mind reflects on,
clearly present reading and writing. [...]
Reading and writing allow us to comprehend our own sins,
and teach us as well how to cleanse ourselves¹⁶.

At the end of the preface, and in deference to his role as court teacher and humanist, Simeon attributes the merit of the manual's publication to Tsar Fyodor, the son of the Tsar who is blessed with all qualities, stating that thanks to the primer young people can learn what is necessary to become wise, loyal and devout:

In order for the faithful to benefit so greatly,
our Tsar Fyodor, son of the Tsar,
who is blessed with many regal qualities,
ordered the printing of this primer
and the inclusion in it of many useful things for young people,
since it is good that everyone remain in the faith¹⁷.

The arguments Simeon uses in verse form in the preface to the primer take up themes that are common in the Baroque poetry of that era. For example, Simeon himself, in his monumental collection of poems entitled *The Garden of Many Flowers* (*Vertograd Mnogotsvētnyi*, 1678-1680), dedicates to the topic of studying the poem *Studying* (*Uchenie*), which underscores the need for young people to study and be zealous in this pursuit, thus becoming like beautiful flowers:

3. How pleasant are the beautiful flowers,
so are dear to all educated children.
[...]
5. The flowers do not delight the senses,
in the way educated children do their father¹⁸.

Simeon Polotskii's primer, which opens with verses inviting the readers to study, ends with other syllabic verses that instead acclaim corporal punishment and probably represent a warning to those students who have not adequately

¹⁶ «Отроче юный от дѣтства учися, [...] Не возлѣнися трудов положити, / имать бо тебѣ полза многа быти. / Аще ся видит досадно труждати, / но сладко плоды трудов собирати. / Иже в юности труды полагает, / во дни старости в покои бывает. [...] Что сердце мыслит, и ум разсуждает, / то писане удобѣ извъщает. [...] От писания грѣх свой лѣть познати, / тожде же учит, како очищати.», ([Simeon Polotskii], *Bukvar' iazyka slavenska*, Moskva, Verkhniaia Tipografia, 1679, f. [2, 2v, 3]).

¹⁷ «Толики ползы да бы вѣрным взяти, / повель типом сей букварь издати: / Царь наш Феодор, от царя рожденный, / множеством царских доброт украшенный: / Нуждная юным, велѣть вомѣстити, / како всѣм вѣру достоин хранити:», ([Simeon Polotskii], *Bukvar' iazyka slavenska*, f. [3-3v]).

¹⁸ «3. Яко же любезни суть прекраснии цвѣти, / тако научении всѣми приятни дѣти. [...] 5. Не тако чюства услаждают цвѣти, / яко же отца – искуснии дѣти» (Simeon Polotskii, *Vertograd mnogotsvētnyi*, Vol. 3: "Prav nikto zhe" – "Epitafion" Simeonu, Edited by A. Hippisley and L.I. Sazonova, Köln Weimar Wien, Böhlau Verlag, 2000, p. 282).

studied the material presented in the primer¹⁹. The rod, whip or cane (*rozga, bich, zhezl*) are presented as useful and necessary instruments for getting children to study:

Oh child, if you wish to have a good mind,
try to always apply yourself in your work. [...]
The rod is needed for the young child, the whip for older ones,
and the cane for the eldest, if the food is sufficient.
These tools reform the fools,
without damaging the body at all.
The rod refines the mind, jogs the memory,
transforms bad will into good will. [...]
Children, love honest labor [...]
Kiss the rod, kiss the whip and the cane,
they are not to blame, do not forsake them²⁰.

Praising corporal punishment as well as the importance of study represents a particularly common theme in the Baroque poetry of that era. The verses of *Rozga* in *The Garden of Many Flowers* are dedicated to this topic: «The hard cane separates the wheat from the chaff, / the rod chases away the fury from the hearts of children»²¹.

Similar verses can also be found in a *azbukovnik*, which dates to the 17th century²²:

The Holy Spirit commands us to hit the child with the rod,
Since the rod does not damage his health.
The rod makes children obedient toward their parents,
The rod teaches them the Scriptures.
Even though it hits the child, the rod does not break his bones,
And it distances him from every vice²³.

¹⁹ Setin, «*Bukvari*» Simeona Polotskogo v riadu drevnerusskikh uchebnikov XVI-XVII vv., cit., p. 103.

²⁰ «Хошеши чадо благ разум стяжати; / тщися во трудѣх выну пребывати. [...] Розги малому, бича болшым требѣ, / а жезл подрастшым, при нескудном хлѣбѣ. / Та орудия глурых исправляют, / плоти цѣлости ничтоже вреждают. / Розга ум острит, память возбуждает, / и волю злую в благо прелагает. / [...] Вы же о чяда, труд честный любите, [...] Цѣлуйте розгу, бичь и жезл лобзайте, / та суть безвинна, тѣх не проклинайте:» ([Simeon Polotskii], *Bukvar' iazyka slavenska*, f. 101, 101v, 102).

²¹ «Плевелы от пшеницы жезл тверд отбивает, / розга буйство из сердец дѣтских прогоняет» (Simeon Polotskii, *Vertograd mnogotsvĕtnyi*, p. 77).

²² The *azbukovniki* were manuscript collections containing a variety of encyclopedic and didactic information.

²³ «Розгою Духъ Святыи дѣтище бити велить, / Розга убо ниже мало здравіа вредить. [...] Розга родителемъ послушны дѣти творить, / Розга Божественнаго писанія учить. / Розга аще и бьетъ, но не ломить, кости, / А дѣтище отставляеть отъ всякія злости.» (D. Mordovtsev, *O russkikh sbkol'nykh knigakh XVII veka*, Moskva, V Universitetskoi tipografii, 1862, pp. 2-3).

On the other hand, the theme of corporal punishment is also dealt with in Vasiliĭ Burtsov's 1637 primer, which depicts a school scene where the teacher is punishing a pupil. Fedor Polikarpov's *Slavic-Greek-Latin Primer (Bukvar' slavenskimi, grecheskimi, rimskimi pismeny)*, published in Moscow in 1701, also contains two similar scenes.

In this regard it is worth asking if a practical application of corporal punishment actually existed along with the praise for it in Simeon Polotskii's primer.

If, on the one hand, as is shown in part by the illustrations in Vasiliĭ Burtsov and Fedor Polikarpov's primers, there is no reason to doubt it was actually applied, on the other it is difficult to believe it was inflicted on the students who Simeon's primer was primarily aimed at. It is more likely that in this case the verses of praise for corporal punishment, which were intended to induce young students to study, represented instead the presentation of a *topos* already widespread in the didactic literature of the second half of the 17th century and the beginning of the 18th²⁴.

Part of Polotskii's 1679 primer is dedicated to greetings (*privĕtstviia*), prose passages that were to be recited by the children of the tsar family and of the court during festivities such as Christmas, Easter, the Pentecost, etc. These verses were directed at a parent and a benefactor.

For example, in the greeting for the Easter we read:

For the Resurrection of Christ. To the parent. We celebrate the day of Resurrection; He is resurrected from the darkness of the netherworld to return to the heavenly homeland: [...] my benevolent parent, rejoice greatly. Try to give thanks to Christ, who has risen again to renew our stock. And may His mercy protect the health of your body, the salvation of your soul and fulfill your desire for wellbeing for the number of years Methusaleh lived. [...] To the benefactor. Lord Jesus Christ, bestow on us, your creatures, a wonderful Easter, [...] What great joy you give us now! [...] You, my merciful benefactor, in the full measure of your abilities, praise and glorify the great creator of this Easter full of gratitude, and may he bring Easter into your soul and transform sin into grace and impotence into strength²⁵.

²⁴ Scholars have emphasized that the praises in verse for corporal punishment, including that in Simeon Polotskii's primer, are probably translations of similar Polish texts (A.I. Sobolevskii, *Obrazovanost' Moskovskoi Rusi XV-XVII vekov*, Sankt-Peterburg, Tipo-Litografiia A.M. Vol'fa, 1892, p. 22 n. 2; S. Miropol'skii, *Ocherk istorii tserkovno-prikhodskoi shkoly ot pervogo ee vzniknoveniia na Rusi do nastoiashchego vremeni*, Vyp. 3 *Obrazovanie i shkoly na Rusi v XV-XVII vekakh*, Sankt-Peterburg, Sinodal'naia tipografiia, 1895, pp. 94-96).

²⁵ «На воскресение христово. К родителю. Свѣтлаго дня воскресения празднуем наш от тмы ада преисподняго восходит, к небесному возвращаяся отечеству: [...] срадуйся ты родителю мой милостивый превесело. Благодарствие христу воскресшему о возставлении рода нашего тщиися возсылати. а сам его благоутробием буди хранимъ во здравии тѣлесном, во спасении душевном, во благоденствии желанном, в маусаилова лѣт протяжения. [...] К благодѣтелю. Бог велий христос господь, великую нам твари своей содѣвает пасху, [...] О коль велие днесъ нам достоит веселие! [...] Ты благодѣтелю мой благоутробный, по совершенный сил твоих мъръ, хвали и величай благодарственно сея превелика пасхи повинника. а он да устроит в душъ твоей пасху, от прегрѣшений во благодать, и от немощей в силу:» ([Simeon Polotskii], *Bukvar' iazyka slavenska*,

Greetings for festivities already existed in the primers printed at the Moscow Printing House in 1667 and 1669, which scholars attribute to Simeon Polotskii²⁶, partly due to the fact that in 1667 he had been entrusted with the education of Tsarevitch Alexis, who would die prematurely in 1670.

For example, the greeting for the Easter in the 1669 primer reads:

For the Resurrection of Christ. To the parent: from the tomb the Angel announces a great joy, my dear parent [...] Now we must call the Tomb of the Lord the heavenly chamber, since it does not house a dead body but the heavenly betrothed [...] To the benefactor: [...] Rejoice, my merciful benefactor, in this grace of Christ and give glory to God, who has created these things [...] And he will deem it worthy to give you life here on earth for many years in health and salvation²⁷.

Including greetings in prose in primers represents an attempt to codify, in the context of a traditional educational program for basic instruction, a custom linked to a culture of rhetoric, which, as L. Sazonova emphasizes, Simeon tried in every way possible to introduce at the Tsar's court²⁸.

f. 85v-87v, 88, 89, 89v).

²⁶ Scholars also attribute to Simeon Polotskii the primer printed by the Moscow Printing House in 1664, which is supposed to contain the greetings texts. Nevertheless, the copy of the primer I was able to consult (second edition), preserved at the National Russian Library in St. Petersburg, contains no such texts. Simeon Polotskii is assumed to be the author of the 1664, 1667 and 1669 primers, in part on the basis of a manuscript collection of greetings of which he is the author (E.I. Setin, «*Bukvari*» Simeona Polotskogo v riadu drevnerusskikh uchebnikov XVI-XVII vv., pp. 96-97; L. Sazonova, M. Robinson, N.N. Glubokovskii: *u istokov nauchnogo opisaniia tserkovnoslavianskikh rukopisnykh i staropechatnykh knig v Shvetsii*, in I. Podtergera (ed.), *Schnittpunkt Slavistik. Ost und West im wissenschaftlichen Dialog. Festgabe für Helmut Keipert zum 70. Geburtstag*, Teil 1: Slavistik im Dialog – einst und jetzt, Göttingen, V&R unipress, Bonn University Press, p. 94).

The copy of the 1669 primer which I consulted, preserved at the Russian National Library in St. Petersburg, is damaged, missing its title page and preface. I have not had the chance to consult the 1667 primer.

²⁷ «На воскресение Христово. Родители: Велию радость Аггел от гроба вѣщает, родителю мой прелюбезный: [...] Черогом небесным гроб Господень нареши нынѣ подобает, яко не мертвеца в себѣ сокрывает, но жениха небеснаго, [...] Благодѣтели: [...] Радуйся убо благодѣтелю мой премилостивый, о сей благодати Христовой, и даждь славу Богу сотворшему сия, [...] Он же возблаговолит дати тебѣ здѣ многолѣтно во здравии, и спасении временный вък жителствовати.» (*Bukvar' iazyka slovenska*, Moskva, Pечатnyi Dvor, 1669, f. 17, 17v, 18v, 19, 19v).

²⁸ L. Sazonova, *Literaturnaia kul'tura Rossii. Rannee Novoe vremia*, pp. 161-162. For information on the life and ceremonies at the court of the tsar during the 16th and 17th centuries, see, for example: I. Zabelin, *Domashnii byt russkogo naroda v XVI i XVII st.*, Tom I. Chast' I. *Domashnii byt russkikh tsarei v XVI i XVII st.*, Moskva, Iazyki russkoi kul'tury, 2000 (reprinting of the 1918 edition); R.O. Crummey, *Court Spectacles in Seventeenth-Century Russia: Illusion and Reality*, in D.C. Waugh (ed.), *Essays in Honor of A.A. Zimin*, Columbus, Ohio, Slavica Publishers, 1985, pp. 130-158; P.A. Bushkovitch, *The Epiphany Ceremony of the Russian Court in the Sixteenth and Seventeenth Centuries*, «*Russian Review*», vol. 49, n. 1, 1990, pp. 1-17; R.S. Wortman, *Scenarios of Power. Myth and Ceremony in Russian Monarchy*, Vol. 1 *From Peter the Great to the Death of Nicholas I*, Princeton, Princeton University Press, 1995, pp. 22-41.

It should be added that enlarging the primer with new educational material that derived from a curriculum of study typical of Polish schools, where rhetoric and poetics were taught on the basis of Western models, naturally concerned a readership that was much narrower with respect to the normal primer readership. In fact, it must be remembered that the 1679 primer was printed at the Upper Typography, which was located inside the Kremlin and subject to the needs of the Tsar and his court.

Simeon's efforts to broaden the education of his young students and to develop a culture of poetry and rhetoric at court had already taken concrete form in 1660, before the primers were printed, when, during a visit to the court of Tsar Aleksis in Moscow, his students at the Theophany Monastery in Polotsk, accompanied by their teacher, recited his verses in honor of Alexis. Also in 1660, Simeon composed other verses to be recited by the students during a visit of the Tsar to the Valday Iversky Monastery²⁹.

With Simeon's transfer to Moscow in 1664, ceremonies with recitals and greetings by students during certain official occurrences and festivities would become customary at court³⁰ and, with the publication of the primers, an essential part of the educational program for the initial instruction of children of the tsar family and of the court dignitaries.

In this regard it must also be noted that the prose greetings for the festivities also appear in the primer of the other great Baroque poet of that era, Karion Istomin (forties of 17th century – not before 1718 or 1722), printed by the Moscow Printing House in 1696 on the order of Tsar Peter for young Tsarevich Alexis. This primer, which in large part reproduces Polotskii's manual, was published in only twenty copies, obviously being intended for distribution within the court³¹. These facts confirm the particular circles within which the primers were intended to be used.

²⁹ I.P. Eremin, „*Deklamatsiia*” Simeona Polotskogo, «Trudy Otdela drevnerusskoi literatury», T. VIII, 1951, p. 354. This study also contains the verses of greeting recited by Simeon's students in 1660 in Moscow in honor of Tsar Aleksis. The verses recited by the students during their visit to the Valday Iversky Monastery are published in L.I. Sazonova, *Literaturnaia kul'tura Rossii. Rannee Novoe vremia*, pp. 708-727. For more on these verses, see also L.I. Sazonova, *Simeon Polotskii: novye stranitsy tvorchestva*, in *Issledovaniia po drevnei i novoi literature*, Leningrad, «Nauka», Leningradskoe otdelenie, 1987, pp. 199-205.

³⁰ The culmination of Simeon's efforts to develop a culture of poetry and rhetoric at the court of the tsar, and the highest expression of his ceremonial poetry, is the collection *Rifmologion* (1678), which among other things contains poems and greetings in verse to be recited on the occasion of festivities and official occurrences, such as the *Greeting for the Day of the Resurrection of Christ (Privëtstvo v den' Voskreseniia Khristova)*, recited by twelve pupils. Recently part of the *Rifmologion* was published, edited by A. Hippisley, H. Rothe and L. Sazonova: Simeon Polotskii, *Rifmologion. Eine Sammlung höfisch-zeremonieller Gedichte*, Band 1, Herausgegeben von A. Hippisley, H. Rothe und L.I. Sazonova, Wien Köln Weimar, Böhlau Verlag, 2013. The text is preceded by an in-depth study by Sazonova: «*Rifmologion*» Simeona Polotskogo – kniga pridvorno-tseremonial'noi poëzii, cit., pp. LXXXVII-CLX.

³¹ L.I. Sazonova, *Karion Istomin*, in D.M. Bulanin, A.A. Turilov (edd.), *Slovar' knizhnikov i*

In concluding this brief analysis and comparison regarding the content of important primers, such as that printed by Vasilii Burtsov or the one published by the Moscow Printing House in 1657, we can state that Simeon Polotskii's primer clearly is part of that group of basic traditional instructional texts which were widespread in the East Slavic territories during the 16th and 17th centuries.

Nevertheless, beyond the circumstances of its publication, this primer is distinguished from other contemporary manuals by the presence of greetings, that is, prose passages destined for recital during festivities and official events which were part of a culture of rhetoric that Simeon, during his long and varied activities, continually strove to have introduced and entrenched at the court of the tsar.

The presence of the greetings in his primer testifies to his desire to broaden and define the basic education of the children of the tsar's family and of the court dignitaries in relation to Russian court life in the second half of the 17th century.

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knizhnosti Drevnei Rusi, Vyp. 3 (XVII v.), Chast' 2 I-O, Sankt-Peterburg, Dmitrii Bulanin, 1993, p. 146. Karion Istomin is also the author of the famous *Primer with Slavic-Russian letters, in bold and italics and lettering in Greek, Latin and Polish with pictures of things, and moralizing verses* (*Bukvar' slavenorossiiskikh pismen ustavnnykh i skoropisnykh, grecheskikh zhe latinskikh i polskikh so obrazovanmi veshchei i so nravouchitel'nymi stikhami*), printed at the Moscow Printing House in 1694. In the primer every letter of the alphabet is taught with the aid of various illustrations of people, animals and objects described in syllabic verse.

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Slavonic-Greek-Latin Primer by Fedor Polikarpov (1701): history and sources of trilingual elementary education in Russia

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ABSTRACT: The paper is dedicated to a historiographical analysis of the Slavonic-Greek-Latin Primer by Fedor (Theodore) Polikarpov published at the Moscow Print Yard in 1701. The unique character of the publication lies in the fact that for the first time in the history of the Moscow book-printing culture there was an attempt to introduce the basics of not only one language but of three languages at the same time: Slavic, Greek and Latin. An important part of the study was to expose the sources of the Primer, and with this end in view, explored were not only earlier Primers but also the manuscript of the trilingual Primer written by Fedor Polikarpov. As of today, we discovered about 70 copies of the Primer in various libraries. As a result of the study of these copies, a conclusion was drawn that by the time of the release of the Primer, the learning of foreign languages had already gradually been entering into the lives of some part of society and a sufficiently trained reading public had already been formed.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Foreign Languages; Primary education; Russia; XVIII Century.

Studies of some elementary schoolbooks, as such, that are considered literary monuments, and studies of the prevailing tradition and the usage of elementary-school learning aids hold a prominent place in the historiography of book-printing trade and of the evolution of pedagogical ideas¹. On the one

¹ The related historiography is so vast that we'll have to confine ourselves to only a number of

hand, it was the most popular literature, and throughout the 17th century, primers and ABC books were repeatedly printed at the Moscow Print Yard²; on the other, owing to the high popularity and demand for these books they were heavily used and most of them were lost. One of the literary monuments of elementary-school learning that has so far received little attention is the 1701 *Slavonic-Greek-Latin Primer* by Fedor (Theodore) Polikarpov³. The historic significance of the 1701 Primer as a sample of book-printing trade lies in the fact that it was the first time in the history of Moscow book-printing that it was attempted to teach students the elements of not only one language but of three at the same time: Slavic, Greek and Latin. To implement such a project, it was necessary to use several fonts, a never-before-seen undertaking in Moscow at the time: before 1701 there were no publications in the capital of Russia printed in several different fonts. Further still, foreign fonts (Greek and Latin) were hardly used at all at the Moscow Print Yard. Therefore, the Primer proves to be a most important monument of book culture and of the developments in the printing trade, as well as a valuable source on the history of linguistic thought and education at the turn of the 17-18 centuries. Accordingly, as observed by E. Babaeva, it was in the Primer that F. Polikarpov first attempted to define the position of the Slavic literary language within the framework of the Orthodox culture maintaining that «faith and not the language brings salvation,» (folium 3 on the reverse side) and at the same time differentiating between the notions of language and text. Babaeva observes that according to Polikarpov «Orthodox dogmata are confined in texts open for insight. While the teaching may be conducted ‘in three languages’, it should also be ‘homogeneous’⁴. The 1701

studies, namely: T.A. Afanas'eva, *Izdanie azbuk i bukvaraj kirillicheskoj pečati v XVIII veke*, in L.L. Al'bina, I.N. Kurbatova, M.Ya. Stetzkevich (edd.), *Iz istorii rukopisnykh i staropechatnykh sobranij (Issledovaniya. Obzory. Publikatsii)*, Collection of research papers, Leningrad, 1979, pp. 33-60; A. A. Chuma, *Yan Amos Komenskij i russkaya shkola (do 70-kh gg. XVIII v.)*, Bratislava, 1970; Yu.E. Shustova, *Azbuka v pechatnykh kirillicheskih Bukvaryakh yuzhnoslavyanskoj i vostochnoslavyanskoj traditsii v XVI – nachale XVIII v.*, «Očerki feodal'noj Rossii», n. 14, 2010, pp. 402-495; R.M. Cleminson, *East Slavonic primers to 1700*, «Australian Slavonic and East European Studies», vol. 2, n. 1, 1988, pp. 1-27; G.J. Marker, *Primers and Literacy in Muscovy: a Taxonomic Investigation*, «The Russian Review», n. 48, 1989, pp. 1-19. M.-C. Bragone, *Alfavitar radi učenija malych detej. Un abbecedario nella Russia del Seicento*, Firenze, Firenze University Press, 2008, *et al.* I must express gratitude to M. Bragone for providing me with valuable references on European historiography.

² According to G.J. Marker, 63 elementary-school textbooks, primers and ABC books were published in Moscow over the period of 1650-1707 (Marker, *Primers and Literacy in Muscovy*, cit., p. 8).

³ Some chapters and stories devoted to various subjects on the history of this monument may be found in the following works: A.A. Sidorov, *Drevnerusskaya knizhnaya gravitura*, Moscow, Izdatel'stvo Akademii Nauk SSSR, 1951; Afanas'eva, *Izdanie azbuk i bukvaraj kirillicheskoj pečati v XVIII veke*, cit., pp. 40-42; M.B. Botvinnik, *Otkuda est' poshel Bukvar'*, Minsk, Vyshejschaya Shkola, 1983, pp. 163-191.

⁴ F. Polikarpov, *Tehnologia. Iskusstvo grammatiki*, edition and research by E. Babaevoj, Sankt-Peterburg, INAPRESS, 2000, p. 12.

Slavonic-Greek-Latin Primer is not unique in terms of genre singularity; its significance lies elsewhere: for the first time in the history of the Moscow book-printing culture there was an attempt to introduce the basics of not only one language but of three at once: Slavic, Greek and Latin.

In the archives of the Printing Trade Department there is a separate file consisting of only a few pages of information on the history of the publication of the Primer. According to it, the printing of the Primer was first launched at the Voskresensk Chamber of the Moscow Print Yard on two printing machines⁵. For the first time in the history of the Moscow book-printing the edition was done, according to the file, «in the Greek, Slavic and Roman alphabets» and «those primer books were published» in June of the year of 1701⁶.

In the file, there is a detailed list of material purchased for the printing of the Primer: «Half a pood of vmattsy wool», «two hundred sages of hempen rope drying leaves», «ten baskets of ash for lye», «seven pounds of fish glue to fix lettersets and press gear», «brush for wash-up of words», «three craftsmen's boxes with locks», «a lock», «eight pounds of brass plate for composing sticks», «also sixteen sheets of white iron for composing sticks», «two altyn worth of nails and straps for the upholstery of the tinpan», «two and a half buckets of flaxseed oil to make varnish», «ten pounds of amber», «colophony and mastic also for making varnish», «pots for cinnabar», «white paint, gum mastic and brushes for manufacturing those books», «five piles of gray paper for rapping those books»⁷. Overall, «fifty-one rubles fifteen altyns and one and a half dengas» was spent for the purchase of the required materials⁸.

While it says in the file that the printing of the Primer was launched on December 28, 1700, the first mention of the edition being prepared for printing at the Print Yard had been some time before. It is mentioned in the file that as early as on August 17, 1700, typesetter Vasilij Petrov was given «English bar tin» to cast words for the Latin alphabet, and on August 22, 1700, typesetter Fyodor Vasil'ev was given «English bar tin» «to cast words for the Greek second alphabet»⁹. The next hand-outs of tin to the typesetters for casting Greek and Latin alphabets were on November 18, 1700, to Vasilij Petrov (for casting words of small-print Greek alphabet) and on December 16 «for additional casting of Greek and of the previous small-print alphabets»¹⁰. The name of another typesetter, Mikhail Efremov, who cast Greek font is mentioned in the documents where it is said that on January 9, 1701, he was given another

⁵ Rossijskij gosudarstvennyj arhiv drevnih aktov (RGADA) [Russian State Archive of Ancient Acts], F. 1182, Prikaz knigopechatnogo dela, opis 3, 205, f. 1.

⁶ *Ibid.*

⁷ RGADA, F. 1182/ 3, 205, f. 2-3.

⁸ RGADA, F. 1182/ 3, 205, f. 3.

⁹ RGADA, F. 1182/ 2, 1, f. 4.

¹⁰ RGADA, F. 1182/ 2, 1, f. 6.

portion of tin «for additional casting of the Greek alphabet»¹¹. After that, the hand-outs of tin took place monthly (on February 18 and March 21)¹². Most likely, the casting of Slavic fonts for the Primer was done by Grigorij Aleksandrov whose name was mentioned in March of 1701 in connection with handing over to him «four poods and twenty pounds of old words in the Osipov fonts for casting the Arseniev fonts», as well as «twenty-four pounds of the same kind of old words for additional casting of the Gimnas'iv fonts, which amount to five poods and four pounds of words»¹³. Therefore, for the casting of fonts, along with the purchased English tin, they also used old worn-out fonts.

The latest reports on additional casting of alphabets date to December, 1701. At that time, it was unlikely that Greek fonts would be needed for any other edition, and therefore it is fair to assume that the printing of the Primer could still continue beyond June, 1701, the date which is mentioned in the document as the final date when the entire edition had been published.

The entire edition was 2400 copies¹⁴ from which 50 copies were given away gratuitously as was the practice of the Moscow Print Yard. Copies were presented to: «great sovereign prince and grand duke Pyotr Alekseevich, right-believing monarchesses empresses and czarevitch and grand prince Aleksej Petrovich and sovereign ladies tsarevnas... sixteen hard-cover gold-edge books»¹⁵. Suchlike copies were presented: to «the collegiate apostolic church of the Assumption of the Most Holy Mother of God» and to Metropolitan Stephen Yavorskij of Ryazan and Murom. Copies in bindings with flowers¹⁶ were presented to «boyars Tikhon Nikitich Streshnev and Ivan Alekseevich Musin-Pushkin, a copy to each, «to the Blagoveshhenskij and Arkhangel'skij confessors protopopes Feofan Feofilaktovich and Petr Vasil'evich, a copy to each»¹⁷. Apart from that, two books for each were meant for «hieromonch Karion Istomin and clerk Matvej Vlasov and also for three people proofreaders»¹⁸, and also two paperback copies for each for «four people scribes, for a reader and for three people scribes»¹⁹.

¹¹ *Ibid.*

¹² RGADA, F. 1182/ 2, 1, ff. 7-8.

¹³ RGADA, F. 1182/ 2, 1, f. 10v. The Osipov and other fonts were named after the letter carvers who made letters for every new edition.

¹⁴ In the present study we draw on the number of copies indicated in the file devoted to the publication of the Primer (RGADA, F. 1182/ 3, 205, f. 1). Identical information about the circulation of the Primer based on subsequent documents is found in the above-mentioned study by G.J. Marker who used a file from the office of the Synod (Rossijskij gosudarstvennyj istoricheskij arhiv (RGIA) [Russian State Historical Archive], F. 796/58, 43, ff. 1-14).

¹⁵ RGIA, F. 796/58, 43, f. 5.

¹⁶ What is meant here are copies with flower imprints on book-edges.

¹⁷ RGADA, F. 1182/ 3, 205, f. 5.

¹⁸ *Ibid.* Though the names of proofreaders are not mentioned in the document it is fair to assume that they were among the people who took part in the publication of the Primer.

¹⁹ RGADA, F. 1182/ 3, 205, f. 5.

All the rest of the books, 2350 copies, were put on sale at a price, according to decree of December 28, 1701, of «sixteen altyns and four dengas for a hard-copy book and of 13 altyns for a paper-back copy²⁰. The prime cost of the publication, that is also indicated in the document, was «ten altyns and four dengas and a half of a quarter-copeck piece» for a paper-back copy²¹.

It is worthy of note that, as it appears from the same document, for the work on the Primer «according to petition and an apostille by hieromonch Karion Istomin, school-teacher hieromonch Palladius» was paid 50 rubles²²: apparently, the man who was mentioned there was the first Russian Doctor of Theology Palladius Rogovskij who studied in Italy and about whose participation in the work on the Primer nothing has been known before in historiography²³.

The Slavonic-Greek-Latin Primer is attributed to Fedor Polikarpov as evidenced by a phrase in Slavic and Greek ciphered in the acrostic *Bogodara Trud* («Θεοδωρο κοπος»), while in the files of the Printing Trade Department no mention of the Primer's authorship has been found. However, we are of the opinion that it is still an open question whether the Primer is an original author's work or a compilation. Still another point of view is that creating his Primer Fedor Polikarpov was following the then existing traditions of presenting and explaining the material. These circumstances might be fully exposed only after all sources of the Primer have been defined and studied.

Though there are some studies discussing possible sources of the 1701 Primer, there is still no full-fledged source study of that edition. Nevertheless, several sources of Fedor Polikarpov's Primer are mentioned in historiography: primers by Vasilij Burtsov, Simeon Polotskij, Karion Istomin and Lavrentij Zizanij. For instance, comparing the primers by Polikarpov and Simeon Polotskij it appears that the number and the arrangement of graphemes in both are almost completely identical. At the same time, as was noted by M. B. Botvinnik, in Polikarpov's Primer the material devoted to vowels and consonants in an alphabet, «examples of syllables on the patterns of which pupils could compose them by themselves», as well as «chapters 'Vo ispravlenie yazyka otrachate, slozi imen po azbutse po titlami', 'Prosodiya verkhnyaya ili udareniya glasa yazhe upotreblyayut slavyane' and 'Chisla' were, most likely, taken from Simeon Polotskij's 1679 Primer, although all this could be already found in the 1637 'Alphabet' by Vasilij Burtsov»²⁴. Therefore, it is hard to make a final conclusion about whether Fedor Polikarpov used Simeon Polotskij's Primer as

²⁰ RGADA, F. 1182/ 3, 205, f. 6

²¹ RGADA, F. 1182/ 3, 205, f. 4v.

²² RGADA, F. 1182/ 3, 205, f. 3.

²³ About him and his works see: N. Nadezhdin, *Palladij Rogovskij, pervyj russkij doctor*, «Syn Otechestva», n. 4, 1840, pp. 548-628; M. Nikol'skij, *Russkie vykhodtsy iz zagranichnykh shkol v XVII stoletii: Palladij Rogovskij*, «Pravoslavnoe obozrenie», n. 10, 1863, pp. 162-172; D.N. Ramazanova, *Palladius Rogovskij (Rogov)*, Bolshaja Rossijskaya Encyclopedia (in print).

²⁴ Botvinnik, *Otkuda est' poshel Bukvar'*, cit., p. 164.

a basis for his edition or whether he acted within the framework of the then existing general tradition.

The source of another part of the edition seems to have been defined most accurately. As observed by A.A. Chuma, «Kratkoe sobranie imen po glaviznam raspolozhennoe tremi dialektami, v pol'zu khotyashhym vedeti svojstvo ellinogrecheskogo i latinskogo dialekta» is a «trilingual (Russian-Greek-Latin) dictionary consisting of 55 chapters», that «coincide almost completely» with chapters of the trilingual dictionary *Nomenclator in lingua latina, germanica et russica* (Amsterdam, 1700), the so called Kopiewski's *Nomenclator*²⁵. A.A. Chuma also noted that «by integrating Kopiewski's trilingual dictionary into his own primer Polikarpov gave it some resemblance to Comenius's language textbooks»²⁶. Therefore, the tradition of making such dictionaries rested not only upon Elias Kopiewski's work but was actually based on writings of the famous European scholar and pedagogue John Amos Comenius. However, from our point of view, it is unlikely that Fedor Polikarpov had borrowed that structure of the dictionary directly from Elias Kopiewski since the work of the latter was published only in 1700 when, according to the forecited documents of the Printing Trade Department preparatory typesetting works for Polikarpov's Primer had already been started.

The possibility that Fedor Polikarpov was directly familiar with writings of John Amos Comenius is corroborated with a print of «a plant growing in the open air with blossoming flowers and leaves» on the reverse of the title page²⁷. Surrounding the print is an inscription 'Man blossoms as a wild flower'. It should be noted that in historiography interpretation of this composition is either absent or the composition is one-sidedly explained as «wisdom is the basis of all and every science»²⁸. However, A.A. Chuma discovered an akin print on the title page of J.A. Comenius's book *Janua linguarum reserata* published in Gdansk (Danzig) in 1643²⁹ with an inscription 'sicut flos agri, sic floret homo' an exact Slavic translation of which is found in Polikarpov's Primer³⁰. Noting that the same symbolic drawing is found in Leonty Magnitsky's *Arithmetic* (M. 1703) A.A. Chuma believed that «it is possible to figure out the origin

²⁵ Chuma, *Yan Amos Komenskij i russkaya shkola (do 70-kh gg. XVIII v.)*, cit., p. 50.

²⁶ *Ibid.*

²⁷ *Ibid.*

²⁸ D.D. Galanin, *Leontij Filippovich Magnitskij i ego arifmetika*, Moscow, Tipografiya O.L. Somova, 1914, p. 8.

²⁹ The existence of an akin print is also mentioned in a writing by A.A. Sidorov. However, he gives the wrong reference to the Gdansk 1640 edition instead of the 1643 one (Sidorov, *Drevnerusskaya knizhnaya gravюра*, cit., pp. 294, 330 (footnote 116).

³⁰ In A.A. Chuma's cited work the expression 'tsvet selnyj' was translated as 'worldly flower' which doesn't precisely correspond to the Latin 'agri'. Among the five meanings of the word 'selnyj' – field, garden, wild, living and rural – the first and the third meanings, obviously, convey the metaphorical meaning of the phrase on the print best of all (see *Slovar' russkogo yazyka XI-XVII vv.*, Vyp. 24 (Se-Skoryj), Moscow, «Nauka», 2000, pp. 49-50).

of the vignette in F. Polikarpov's Primer and L. Magnitsky's Arithmetic. As we see, the vignette dates back to the works of the great classic of pedagogics J.A. Comenius and there is no doubt that it is the educational principle of nature alignment that it expresses³¹. Therefore, according to A.A. Chuma, the phrase in the print includes a principle of «a new for that time pedagogics: upbringing and teaching must take place without coercion, freely, in a way that plants develop in nature in a free and easy manner»³². This principle can be traced in educational writings of J.A. Comenius who was against violence and coercion in schooling.

This is why, concludes the researcher, «by placing the vignette in the Primer» Polikarpov follows Comenius's principles since by this he expresses «an alike idea of nature alignment» and so it was actually suggested to «the Russian teacher of the early 18th» century that he should, act in line with the nature of the kid when educating him»³³.

While Fedor Polikarpov was, most likely, familiar with J. A. Comenius's writings and ideas, these conclusions cannot be viewed as ones fully reflecting his views concerning educational principles. One cannot pass over the fact that along with the symbolic 'wild flower' there are also, among the prints found in the Primer, two well-known and repeatedly reproduced in works on the history of pedagogics pictures of school-scenes depicting beating of a pupil by the teacher and a kneeling pupil reciting a lesson before a teacher. These pictures depict an image of a very different school, of a school based on principles of coercion and punishment that are contrary to J.A. Comenius's thinking³⁴. On the one hand, the coexistence in Polikarpov's Primer of the 'wild flower' together with such pictures doesn't let us make a definite judgment about his own pedagogical views; on the other, such coexistence was a sign of time when liberal ideas had already gained noticeable recognition in Russia despite the tangible influence of traditions of the old school where «Didascals [...] masterfully tried very hard to surpass each other describing the meaning and use of birch»³⁵.

³¹ Chuma, *Yan Amos Komenskij i russkaya shkola (do 70-kh gg. XVIII v.)*, cit., pp. 51-52.

³² *Ibid.*, p. 51.

³³ *Ibid.* However, we must note that the described above «wild flower» vignette first appeared as early as in 1699 in the book *Apostol* printed in Moscow which makes it difficult to interpret the symbol with confidence as an image of an educational idea.

³⁴ Compare with poetic pronouncements of the usefulness of corporal punishment and of praise of birch which were not uncommon in the 17th-century primers: D.L. Mordovtsev, *O russkikh shkol'nykh knigakh XVII veka*, Moscow, Universitetskaya tipografiya, 1862, pp. 2-4, 13-16; S.I. Miropol'skij, *Ocherk istorii tserkovno-prikhodskoj shkoly ot pervogo ee vozniknoveniya na Rusi do nastoyashhego vremeni*, Vyp. 3: *Obrazovanie i shkoly na Rusi v XV-XVIII vekakh*, St-Petersburg, Sinodal'naya tipografiya, 1895, pp. 95-96.

³⁵ Miropol'skij, *Ocherk istorii tserkovno-prikhodskoj shkoly*, cit., p. 96. However, as was noted at the end of the 19th century by A.I. Sobolevskij, «the famous dithyramb in honor of the birch ('Holy Ghost orders the kid to be birched'), along with other rhymes in more recent primers, was a translation. Its Polish original version had been still included in Polish primers in the late 50s and early 60s of this century». See A.I. Sobolevskij, *Obrazovannost' Moskovskoj Rusi XV-XVII*

Additional information about the sources of the 1701 Primer is found in the manuscript of the book in the collections of the Manuscript department of the library of the Moscow Synodal Printing House³⁶. The code consists of two different-format parts: the first part in format 4° (leaves 1-75), the second one in format 2° (leaves 76-136)³⁷. The examination and comparison of the texts of the manuscript and of the printed edition showed that the code was the proof copy used for typesetting. This is evidenced by the presence in the manuscript of numerous notes, comments and directions as to the text composition and its appearance, as well as of various proofreading marks that were fully taken into account in the printed version of the Primer. Marginal notes in the manuscript were made both by the typesetter or scribe, and by Fedor Polikarpov himself who gave instructions regarding the text layout. For instance, in the chapter containing Gregory the Theologian's verse with a moral, there are directions to the effect that the Greek verse must be set up first, then the Slavic one placing it below the former, and then the Latin one («nabirat' prezhde grecheski stikh, potom slavenski, rech' pod rech' privodit', a posledi latinskoyu», f. 127). Everything on the pages that had to be set in red print was written in the manuscript in cinnabar or was highlighted in red. In all occurrences of two-letter and three-letter syllables crossed out were variants of consonant plus vowel with a iota subscript.

Nevertheless, there are some variant readings, as well as whole fragments of text in the printed edition that are missing in the manuscript. In particular, these discrepancies concern images: there are no prints in the manuscript and in places where headpieces were supposed to be placed there are notes 'headprint', as for instance, on folium 96 of the manuscript (which corresponds to f. 40 of the printed edition). Likewise, in the code's text absent are almost all fragments with rows of Slavic-alphabet syllables which may mean that this part was set up from some other edition. All throughout the manuscript, letter 'я' was replaced with 'А' (little 'yus')³⁸. Another confirmation of the fact that it was exactly this manuscript that was used by typesetters in their work on the Primer is that there is a note in the top margin of the first folium of the manuscript's second part (f. 76): «The primer is made from this translation in 1701, the last folium of the translation was lost by typesetter Aleksej Kornilov». As we can see, the note not only gives us the name of one of the typesetters³⁹ but also evidences

vekov, St. Petersburg, Tipografija A.M. Wolfa, 1892, p. 22 (note 2).

³⁶ RGADA, F. 381, Rukopisnoe sobranie biblioteki moskovskoj sinodal'noj tipografii [Manuscript department of the library of the Moscow Synodal Printing House], 1175.

³⁷ There are several different folium numberings in the manuscript; here we adhere to the foliation made in pencil.

³⁸ Read more about Fedor Polikarpov's activities in the realm of spelling correction and lexicography in: Polikarpov, *Tehnologia. Iskusstvo grammatiki*, cit.

³⁹ Apparently, it is no coincidence that it was Aleksej Kornilov who served as a typesetter for Fedor Polikarpov's Primer since he graduated from the Slavonic-Greek-Latin Academy where he studied in the 90s of the 17th century, the time when F. Polikarpov and N. Semenov were lecturers

that the 1701 edition (or at least its second part) was based on a translation of some other primer.

Apart from that, on the f. 95v there is a crossed-out note indirectly referring to some Kiev edition: «hereupon, the rest is to be set up according to the Kiev elementary». When we compare the text of the manuscript with that of the printed edition we see that this folium approximately coincides with f. 38 of the Primer's printed edition.

Therefore, it could be believed that the sources of the Fedor Polikarpov's Primer were also some translated Primer and the Kiev elementary. As yet, we have not been able to find those editions. There is hope that we will find them in the library of the Moscow Synodal Printing House.

Source identification is important not only in relation to the literary monument's text but also to the artistic finish of the edition. Comparison of the Primer with other editions published by the Moscow Print Yard at the turn of the 17th and 18th centuries shows that the Primer was one of the best illustrated books of the time: there were 19 prints in it. A.A. Sidorov was among the first who, in his study devoted to the history of Old Russian prints, presented an analysis of the Primer's illustrations⁴⁰. According to him, prints in the Primer, as was the case with some other publications of the time, were a 'mixed' collection⁴¹. The analyst also suggested some ideas concerning the probable authorship of the prints⁴². It should be noted, however, that in the abovementioned file of documents on the history of printing the Primer there is no information about carvers, gravers or artists involved in the work on the edition. It may be explained by the fact that the lithographic plates had been previously made for some other editions.

Therefore, the research suggests that only some of the prints found in the 1701 Primer were also seen in previous editions and that lithographic plates for them could have been made before. However, a considerable part of the pictures was specifically engraved for the Primer and in some cases those pictures were then reproduced in subsequent publications of the Moscow Print Yard. As to the sources of these prints, it was A.A. Sidorov who first noted that «in Fedor Polikarpov's Primer ... we can see several processes: a nearly straightforward replication of old material and alongside that, in images of saints, downright employment of Ukrainian traditions and artistic devices»⁴³.

Yet, we must indicate that many of the images that were replicated in the Primer – and not made specifically for it – were taken from the Ukrainian graphic tradition: for instance, direct borrowing is seen in the print *Gregory*

of the Academy.

⁴⁰ Sidorov, *Drevnerusskaya knizhnaya gravitura*, cit., pp. 290-294.

⁴¹ *Ibid.*, p. 290.

⁴² Alekseev, Matvej Pnevskij, Mikhail Karnovskij and two other unknown artists who could have been the authors of the prints.

⁴³ Sidorov, *Drevnerusskaya knizhnaya gravitura*, cit., p. 290.

*the Theologian*⁴⁴. On the other hand, European traditions of book-design are obviously reflected in the Primer's prints. Among the examples of this is the first print in the book, the emblem *Wild flower* the source of which is well known and dates back to the Gdansk and Nuremberg editions of John Amos Comenius's writing, as was already mentioned above. Also, it is in the European publications that we should look for the source of No. 8 print (*Moses Receiving the Scrolls*) where there is an English or, maybe, a Dutch word GOD is written; no prints with the word GOD written in this manner are found in any Russian or Ukrainian publications.

Besides prints, other elements were also used in the Primer's book-design: there are five headpieces⁴⁵ and three end-pieces⁴⁶ there. These ornaments were widely used both before and after the 1701 Primer had been published, while some of them were used as late as up to the 1730s.

Though the contents of the 1701 Primer is known in detail⁴⁷, it is advisable to take note of the manner in which alphabets, as well as the basics of the Greek and Latin languages are presented. After presenting the basics of the Slavic alphabet, the author moves on to the Greek and then to the Latin script. In those sections of the book revealed are not only Fedor Polikarpov's principles of teaching the basics of foreign languages but also language norms he adhered to. He presents the basics of Greek and Latin in approximately the same order as that of Slavic; and he uses the same letter-combination method that is used in teaching Slavic⁴⁸. Following the images of the letters of the Greek alphabet, there are chapters «About Letters», about superior symbols, numerals and syllables. Of particular interest is the section on teaching syllable-reading in Greek and Latin where the Slavic transcription for reading Greek and Latin syllables is presented. This gives us an opportunity to get an idea about how Fedor Polikarpov spoke and read in Greek and Latin and we can also surmise that he had been taught to read so by Likhud brothers Joannicus and Sophronius who were professors at the Slavonic-Greek-Latin Academy at the end of the 17th century and who probably spoke the same way.

Following those sections, are trilingual chapters where almost all phrases are set in three fonts, although, ways of depicting foreign-language texts in these chapters vary. As a rule, the texts are arranged in the following way: a Slavic

⁴⁴ One can see direct relationship of the print with the image: T.N.Kameneva, A.A. Guseva, *Ukrainskie knigi kirillovskoj pečati XVI-XVIII vv. Catalog izdanij, khranjashikhsa v Gosudarstvennoj biblioteke SSSR imeni Lenina*. Vyp. 2, Moscow, 1976, p. 158, n. 359; p. 189, n. 408.

⁴⁵ A.S. Zernova, *Ornamentika knig Moskovskoj pečati kirillicheskogo shrifta (1677-1750)*, Moscow, 1963, N. 10, 125, 180, 197. One of the five headpieces is not in A.S. Zernova's catalogue.

⁴⁶ *Ibid.*, No. 644, 646, 648.

⁴⁷ See e.g. Botvinnik, *Otkuda est' poshel Bukvar'*, cit., pp. 163-167.

⁴⁸ Compare with observations made by B.A. Uspenskij about the Slavs inheriting from the Greeks the read-by-syllable system: B.A. Uspenskij, *Starinnaya sistema chteniya po skladam (Glava iz istorii russkoj gramoty)*, «Voprosyazykoznavnija», n. 5, 1970, p. 82.

phrase under which in two columns there are Greek and Latin translations of it, each supplied with a Russian transcription. Presented in this manner are the best known and traditionally significant for learning texts: prayers, psalms, Symbol of the Faith, Ecumenical Councils' rules.

The next section of the trilingual Primer brings students up to a further stage of learning Greek and Latin: while the texts there are also arranged, as before, in three columns (Slavic, Greek and Latin) that section lacks the Slavic-letter transcription and only carries translations of Slavic fragments into Greek and Latin.

As can be seen from the above, Fedor Polikarpov presents the material gradually beginning with literacy basics (alphabet, numbers, superior symbols, punctuation characters, etc.) and then goes over to more sophisticated texts. The same principle first used in the elementary sections devoted to the Slavic language is then implemented in chapters designed for learning Greek and Latin. In this respect, Fedor Polikarpov's Primer is not only the first foreign-language textbook published in Moscow but also the one in which methodic consistency of language-learning principles is adhered to.

Judging by handwritten notes in the copies of the book, within the first decades after publication, the Primer gained circulation. For instance, owners of copies of the Primer were people from various social groups: kamerir Petr Ivanov (1728)⁴⁹, «student of Academy Maksim Vyndomskoj» (1721)⁵⁰, hierodeacon Savvatij Sijkskij brought the book «to the house of Kirill Belyj in Novoezersk monastery [...]. In memory of mother» (early 18th century)⁵¹. In the same years, a copy of the trilingual Primer found its way to a church hierarch from South Slavic lands, the fact attested by a possessory label of the metropolitan of Pech, the future Patriarch of Serbs Arsenije Jovanovich Shakabenta (1724)⁵². In the 19th century, the Primer, apparently, ceased to play its initial role of a book for elementary teaching and became an item of collection and research. Its copies were kept in libraries of Russian scholars and statesmen, philanthropists and bibliophiles M.N. Murav'yov (1757-1807), O.M. Bodyanskij (1808-1877), V.I. Grigorovich (1815-1876), K.I. Nevostruev (1815-1872), I.A. Shlyapkin (1858-1918), P.M. Mal'tsev (1856-1919) and others.

⁴⁹ Rossijskaya Gosudarstvennaya Biblioteka, Muzej knigi [Russian State Library. Museum of Books], No. 8475.

⁵⁰ Nauchnaya Biblioteka Tverskogo Gosudarstvennogo universiteta [Research Library of the Tver State University]. 491.8/1150. Asset No. 65766. See description: G.S. Gadalova, E.V. Perelevskaya, T.V. Tsvetkova, *Kirillicheskie izdaniya v khranilishhakh Tverskoj zemli*, Tver, Liliya Print, 2002, p. 210.

⁵¹ Cherepovets Museum of Regional Studies. 89-1925; 921/49 (See description: *Pamyatniki pis'mennosti v muzeyakh Vologodskoj oblasti*: booklet- guide: Part 2 [in 2 issues], Vologda, 1983-1985 [Issue 1]: *Knigi kirillicheskoj pechati (1564-1825)*, ed. A.A. Amosov, Vologda, 1983, No. 82.

⁵² Research Library of the Odessa I. I. Mechnikov National University. Rare Book Department, 5591.

One could think that in the age of Peter the Great with its pragmatic interest in West European culture – quite obvious after The Grand Embassy of 1697-1698 – focused on learning the living European languages and mastering practical knowledge in engineering and military art, a book like Slavonic-Greek-Latin Reading Primer would not be in demand. However, at that time there were also other processes in culture and education related to the classical antique heritage. It can be said with little doubt that the demand for Fedor Polikarpov's trilingual Primer by the public was due, according to S.I. Nikolaev, to an explosive growth of ancient classical literature being translated, when by the end of the second decade of the 18th century there appeared «many more translations of these works of literature than over the entire previous history of Russian literature»⁵³. Irrespective of the author's intentions, the «great ascent to heavens» («stostepennyj v nebo voskhod»), as Polikarpov described his Primer, proved to be, for the Russian reader, an insight into antiquity. Still, it is safe to assume that the 19th century bibliophiles were very much aware of the 1701 Primer's value not only as a literary monument of the age of Peter the Great but, first and foremost, as the first Russian publication offering the basics of classical education.

⁵³ S.I. Nikolaev, *Literaturnaya kul'tura Petrusovskoj ehpokhi*, St. Petersburg, Izdatel'stvo «Dmitrij Bulanin», 1996, p. 33.

Between Enlightenment and Orthodoxy: The Primers of Platon (Levshin) and the Ascent of Secular Russian in the Late Eighteenth Century

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ABSTRACT: This essay discusses the engagement of Metropolitan Platon Levshin of Moscow in the development of literacy instruction during the last quarter of the eighteenth century. It reviews the contents and circulation of his abecedarian, as well as his collaborative work with the Commission on Primary Schools that Empress Catherine the Great established in 1782. The context in which I examine these activities is defined by the intersection of Orthodoxy and Enlightenment. I argue that Platon engaged the concerns of both outlooks and their constituencies by fashioning a well-crafted model. On one hand, he widened the space for learning secular Russian and the secular orthography much more widely than had his predecessors. On the other hand, he massively expanded the circulation of catechisms (which he authored), and made catechization integral to the pedagogy of literacy. With this blend of the secular and the sacred he was able to engage the Enlightened Russian public on its terms, while maintaining the primacy of faith and the pursuit of salvation that were fundamental to Orthodox teachings.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Catechism; History of Education; Russia; XVIII Century.

1. *Between Orthodoxy and Enlightenment*

The last several years have witnessed a rather remarkable revival of interest in Platon Levshin, the Metropolitan of Moscow during much of the reign of Catherine the Great. In print and electronic media, Metropolitan Platon has been the focus of considerable attention, much of which is intellectually

serious. In 2012 the Moscow Dukhovnaja Akademija housed an exhibition on his life and works. There also is a relatively new series of occasional papers, *Platonovskie čtenija*, of which two numbers have appeared to date. Numerous biographies have appeared on the Internet, some of which are based on original research. Platon, in short, is once again a hot topic, and deservedly so.

Inevitably, for someone as prominent and as prolific as he was, his legacy is somewhat contested, claimed by multiple communities. Thus, the website of the Trinity St. Sergius Monastery embraces Platon as a “second Chrysostom”¹, that is, as a pillar of Orthodox tradition, learning and institution building, who rigorously carried on the work of the early Church fathers. Other works, such as Elise Wirtschafter’s new biography, situate him rather differently, maintaining that he is best understood as a key participant in the Russian Enlightenment, one whose pastoral message endeavored to update the Church’s message to respond to the spirit of the age². Similarly, the recent dissertation by Andrey Ivanov (Yale University, 2012) emphasizes the ease with which Platon functioned in the beau monde of sociability inhabited by cosmopolitan lay elites³. Still others see him as following in the footsteps of Feofan Prokopovič in pursuit of a modernizing proto-Protestant theology in the seminaries and Theological Academies.

Unquestionably Platon was a very active public figure who pursued multiple agendas. He worked in multiple cultural spheres, both lay and clerical, whose consistency with one another deserves a good deal more exploration and thought. Even with all the renewed attention, he still awaits an updated full-length intellectual biography to replace the old (1890s) but still serviceable work of I. M. Snegirev. This paper seeks to contribute to the reassessment of Platon’s place within the Russian Enlightenment, but in a very specific and concrete way, around the concept and institutional pursuit of universality. Orthodox and Enlightenment writings employed the idea of universality ubiquitously as

¹ “Vtoroj Zlatoust’ Mitropolit Platon (Levshin)” [*“A Second Chrysostom: Metropolitan Platon (Levshin)” in Russian*]: see <<http://www.stsl.ru/articles/all/vtoroj-zlatoust-mitropolit-platon-levshin>>.

² E. Wirtschafter, *Religion and Enlightenment in Catherinian Russia: The Teachings of Metropolitan Platon*, DeKalb, Northern Illinois, 2013. Earlier biographies have also raised this question, but not as pointedly as Wirtschafter. See K.A. Pappmehl, *Metropolitan Platon of Moscow (Petr Levshin, 1737-1812). The Enlightened Prelate, Scholar, and Educator*, Newtownville MA, Oriental Research Partners, 1983; N.A. Lebedeva, *Prosvetitel’skaja dejitel’nost’ moskovskogo mitropolita Platona (P. E. Levshina) v epokhu rossijskogo prosvetšeniia* [*The Educational Activities of Metropolitan Platon (P. E. Levshin) of Moscow in the Era of the Russian Enlightenment*], «Vestnik SPbGU kul’tury i iskusstv», n. 4, December 2011, pp. 160-168. It also constitutes a major theme of the old, but still informative, biography by I.M. Snegirev, *Zhizn’ moskovskogo mitropolita Platona* [*The Life of Metropolitan Platon of Moscow*], 2 vols., Moscow, I. Efimova, 1890, 1892, as well as Platon’s autobiography. Snegirev’s book has recently been reissued both in Russia and in Georgia. Platon’s diary and autobiography are included in Volume 2.

³ Andrey Ivanov, *Reforming Orthodoxy: Russian Bishops and Their Church, 1721-1801*, PhD dissertation, Department of History, Yale University, 2012.

cornerstones of their outlooks, but they generally had very different universalities in mind.

Within the Enlightenment, ‘universality’ focused preeminently on the mind, and it assumed that an innate capacity to reason and understand and to feel dwelled within every human being. This understanding of universality was earthly, experiential, secular, exclusively human, and embodied. Leading Enlightenment thinkers, Russian, French, German and others, constructed teleologies of progress around that core conviction, believing that knowledge, human happiness, law, administration, and even individual freedom would inexorably improve, but only through engaging human reason. Thus, the possibility of progress was also deemed universal. Emotions, described as ‘passion’ or ‘enthusiasm’, constituted the dark side of embodied universality, the antitheses of reason and progress. This binarism of mind and feeling pervaded Enlightenment writing, Russian included, as evidenced by Catherine II’s *Nakaz* (Instruction) to the Legislative Commission, to give but one example.

Orthodox thinkers, whether Byzantine, South Slavic, Russian or Ukrainian, also embraced the idea of reason (*razumenie*), both human and divine, and had written about it since the days of the earliest church fathers. For them, however, the essence of human universality lay elsewhere, in the soul and the pursuit of redemption. Fallen humanity resided in a world suffused with sin, temptation, and evil. But all souls irrespective of age, gender, ethnicity, geography, or station in life had the chance for salvation and eternal life, a universality at once earthly and celestial, time-bound and timeless. The abiding faith in the incarnation, making God man through Jesus, Mary as the second Eve, and Christ’s crucifixion and Resurrection articulated the core Christian doctrine of humanity’s second chance, that all souls had the possibility of being granted salvation and eternal life once they accepted the true faith (in this case Orthodoxy) and lived according to its precepts. No belief was more fundamental to Russian Orthodox than this, and it situated universality separately from the mind/body dichotomy.

The intertwining of these parallel doctrines – reason and soul, earth and Heaven, historical time and eternity – constituted the matrix within which Orthodoxy and Enlightenment communicated during the reign of Catherine II. Metropolitan Platon, along with Gavriil Petrov, was deeply involved in all of these questions. This paper, however, is not an exercise in *Begriffsgeschichte* or *Geistesgeschichte*. It does not dwell on abstract ideas, theological tracts, speeches, or sermons, all of which Platon produced in great profusion. Rather it addresses universality in the context of pedagogical practice, specifically as it related to his approach to the languages of learning and literacy. While more prosaic than the history of ideas, I would argue that the study of literacy and literacy texts sheds light on a key arena of cultural contestation: the written word. Language, after all, was understood by both lay and clerical thinkers to have been the gateway to knowledge after the fall, the power of seeing with

new eyes. Knowledge could be dangerous, the forbidden fruit, if unguided or uncontrolled. Or, it could be the threshold to God's light (*svet, prosvet, prosveščenie*), the iconographic radiant sun, or saving grace.

Whoever was entrusted to patrol this gateway, especially in a land such as eighteenth-century Russia with a mostly unlettered populace, had considerable power indeed. And that power had rested essentially with the church throughout the ages leading up to the age of Catherine II. Typically, the Russian Orthodox church had taken a decidedly conservative view toward any step that might diminish its authority over the word, or that might shift it even slightly into the hands of individual believers themselves. The eighteenth century had seen that control grow more complicated and conditional, however, both linguistically and institutionally. The emergent literary language, the appearance of new lettered elites, both lay and clerical, meant that the very understanding of what constituted language and literacy had become multiple, but increasingly intermingled. It is at their points of intersection that Platon's role was most acute, and where the issue of literacy as universality becomes relevant to understanding the spaces where Orthodoxy and Enlightenment overlapped. Platon was exceptionally well read in several fields of learning, including contemporary history and philosophy, and he had a firm grasp of the role that language played in the search for and production of knowledge. Some of his earliest works, dating as far back as the late 1750s, reflect this consciousness, and it stayed with him throughout his career.

As I read him, Platon defined his pastoral mission primarily as one of spiritual revitalization, deepening general understanding of the tenets of Orthodoxy, the core beliefs rather than simply the rituals that expressed them, while simultaneously situating Orthodox writings within the habitus of educated society. This approach entailed that he write in language, tropes, and styles that were familiar to lay audiences, but that he deploy these tools so as to maintain the primacy of faith as he understood it. Feofan Prokopovič had expressed something similar decades earlier, but with a very different understanding of what it meant to write in simple language. Platon's embrace of literary language was only partial, moreover, and at times highly conditional.

The primacy of faith continued to privilege the language of liturgy within pedagogy, and his openness to having the church participate in the literary and secular realm was predicated on presiding over the gateway to literacy to ensure that it began, as in the past, with *zakon Bozhii* (Divine Law). For him, true knowledge of Orthodoxy among believers was paramount, and at least within primary education, his chosen instrument was the catechism – in particular his own catechisms, which he eventually introduced into virtually every site of Russian literacy instruction, church, state, and private. By the end of the reign of Catherine II, Platon's catechisms had become standard elementary texts in the curricula of seminaries, parish classes, Cadet Academies and in the primary classes of the new public schools. His intervention into institutional schooling

reached far deeper than anything that his immediate predecessors had achieved. Simply put, under his oversight Platon's Slavonic catechisms became the price of admission to the world of reading in Russia, whether *bozhestvennoe* or *grazhdanskoe*.

The written Russian language, as we know, had been an arena of dynamic and often contradictory developments, especially since the alphabet reforms of Peter I.

Over the half century before Platon's ascendancy to the Metropolitan seat, the teaching of reading and writing had been characterized by what might be termed a model of separate or compartmentalized spheres of language. After 1737, ordained clergy (*sviaščennosluzhiteli*) were obligated to attend seminaries (although not necessarily to graduate), where they stayed often for eight-to-ten years, sometimes even longer. Once they demonstrated basic facility in Slavonic literacy they were introduced to a course of study in Latin, modeled on Jesuit Academies. Rarely did their instruction include learning the emerging secular literary language. The better educated and inquisitive seminarians were able to acquire it quite easily, of course, but one official report after another acknowledged the inability of most parish clergy to understand modern written Russian.

A great deal of previous scholarship has established the functional disconnect between their Latin training and the demands of a typical clerical career, whether in the diocese or in monasteries. Prayer, liturgy, lectionary, confession, homiletics, and record-keeping all employed *kirillitsa*. Seminary students seem to have understood this, and evidence from the histories of individual seminaries shows a pattern of widespread indifference to Latin, a willingness to sit passively in the same courses year after year until a coveted parish job came available⁴. And yet Synodal officials – Platon included – vigorously defended Latin instruction against all criticism, seeing it as a mark of higher (and, by the way, quintessentially European) learning, a distinction that few educated laity could claim. Here language constituted a cultural marker or boundary, a way of enforcing a separate cultural sphere, or so the church hierarchy imagined. Latin therefore remained as the primary subject and language of instruction in the seminaries into the early nineteenth century.

Outside the seminaries the situation was different. At the level of basic literacy, the church maintained the old *bukvaslagatel'naja* (letter-syllabic) system, based upon a ladder (actually, more like a sharply narrowing pyramid) of literacy that ascended from *azbuka* to *časoslovie* (Book of Hours), leading ultimately to the Psalter and, for a very few, the Gospels⁵. This system continued

⁴ The best account of parish clergy in general, including a review of the non-utility of Latin is Gregory Freeze's classic monograph, *The Russian Levites: Parish Clergy in the Eighteenth Century*, Cambridge, Harvard University Press, 1977, especially chapters 4 and 7.

⁵ On the pedagogy of this system see D. Izvekov, *Bukvarnaia sistema obučenija v iskhode XVII i načale XVIII st.*, [*The Primer System of Instruction at the End of the Seventeenth and Early*

to emphasize recognition and memorization over writing and interpretation⁶. The orthography was *tserkovnyi shrift*, and the language was Church Slavonic. The system was not designed to act as a bridge to individual or private reading. Still less was it conceived as a pedagogical bridge to the literary language, even though, as with Latin, some did make the transition easily enough. Once again, basic literacy was understood to be bounded.

And then there was the third piece of our literacy troika, *grazhdanskij shrift*, an orthographic reform that over the decades had generated new grammars and the famously furious debates among Lomonosov, Trediakovskij, Kantemir, and Sumarokov concerning the proper approach to constructing a new secular “literary language”⁷. A scattering of civil abecedaria had been printed over the years, but not very often and never in great quantities, perhaps ten percent or less of the total abecedarian in circulation. No new ladder of literacy had come into existence upon which the reading of secular Russian might be more fully taught. As before, *azbuka*, *časoslovie*, *paslytŷ* constituted the progression. Still, for nobles and state servitors the new literacy was essential, and, as literary Russian took shape, it became the standard for a great deal of reading and writing. Thus, the Academy of Sciences and Cadet Corps generated a small number of abecedaria in the secular orthography, such as the *Rossijskaja azbuka sposobstvuiuščaja čteniju grazhdanskoj pečati* four editions of which the typography of the *Sukhoputnyi kadetskij korpus* (Corps of Cadets) published between 1757 and 1767, in an aggregate run of about 1000 copies. At no point, however were these specialized primers intended for, or placed into, general circulation.

So, by Platon’s day Russian culture had evolved three distinct literacies, a polyglossia that imagined three distinct categories of people needing or wanting to read: clergy; humble laity; educated society and state officials. For the most part these operated in separate or self-contained realms. Certainly, quite a few well educated clerical memoirists from the mid and late eighteenth century (writing, of course, in Russian) did comment on how their parents instilled in

Eighteenth Centuries], «Sem’ia i shkola», n. 42, 1872, pp. 723-750. The goals of this pedagogy were made explicit in a seventeenth-century manual for teachers, «Nakazanie ko učitelem kako im oučiti detei gramote i detem oučitisia Bozhestvennomu pisaniju i razumeniju» [*Instructions for Teachers on How to teach Literacy to Children Through God’s Words and Reasoning*]. It circulated exclusively in manuscript at the time but was subsequently published in I.V. Jagič (Jagič), *Razsuzhdenija iuzhnoslavianskoj i ruskoj stariny o tserkovno-slavianskom iazyke*, St. Petersburg, Academy of Sciences, 1896, pp. 500-504.

⁶ There is a great deal of scholarship – even in English – that describes this system. See, for example, M. Okenfuss, *The Discovery of Childhood in Russia: The Evidence of the Slavic Primer*, Newtownville, ORP, 1980; G. Marker, *Literacy and Literacy Texts in Russia, A Reconsideration*, «Slavic Review», vol. 49, n. 1, 1990, pp. 74-89.

⁷ The definitive study of eighteenth-century language and culture is V.M. Zhivov, *Iazyk i kul’tura v Rossii XVIII veka* [*Language and Culture in Eighteenth-Century Russia*], Moscow, Shkola Jazyki ruskoj kul’tury, 1996.

them a love for reading in childhood, and in such an environment the shift from church-based literacy to reading in general reading proved seamless. Platon himself recalled the pleasures of reading very widely during his childhood⁸. But for many others, those who read at a far more basic level, the boundaries of language remained formidable and largely unbridgeable without a change in pedagogy. This, after all, is the enduring fact about the continuum of abilities and reading practices subsumed under 'literacy': in turns fragile and elastic, bounded and unconstrained. In some circumstances it easily leads to engaged and imaginative reading of unfamiliar texts; in others it never rises above a mechanical and minimally cognitive skill.

2. *To Reform or Not To Reform: Platon's Učenie*

The histories of Russian education have given considerable attention to the multitude of educational projects of mid- and late-century, and some of the most important of these originated in the church itself, largely through the efforts of Platon and Gavriil Petrov. Both of them formulated plans to increase enrollments and improve the educational levels of students enrolled. A series of commissions involving both church and state representatives met during the late 1760s and early 1770s, to consider the general state of Orthodoxy, clergy, and parish life. Perhaps the most noteworthy outcome of these deliberations was a massive increase in the printing and circulation of approved sermons and *bogoslovskie npravoučeniia* (religious moral instructions) to dioceses and parishes, where, it was hoped, parish priests would begin to read them aloud on important religious days. In order to do so, the education of clergy would require reform, and in this spirit they looked into the state of education for both seminarians and *popoviči* (priests' sons) overall. The proposals they considered were far reaching, even grandiose, and would have greatly reshaped church education so as to integrate it more fully into the world of secular knowledge. Scholarship agrees, however that little came of these plans, and both Gavriil and Platon bemoaned the continued inability of parish clergy to decipher the sermons (Gavriil termed the added circulation *bezplodno* (fruitless)). In short, the segregation of learning remained more-or-less the norm on the ground until at least 1780⁹.

⁸ *Autobiografija ili Zapiski o zhizni Platona, mitropolita Moskovskogo* [The Autobiography or memoirs of the Life of Metropolitan Platon of Moscow], in *Platon, mitropolit Moskovskij* (Levshin), *Polnoe sobranie sočinenii*, Moscow, vol. 2, n. 9, 1913, pp. 331-332.

⁹ V.V. Titlinov, *Gavriil Petrov mitropolit novgorodskij i sanktpeterburgskij (1730-1801 g.)*, Petrograd, 1916, pp. 228-266; 569-576; Snegirev, *Zhizn' moskovskogo mitropolita Platona*, cit., 1, pp. 34-49.

Once firmly established in Moscow (first at the Dukhovnaja *Akademija* and then in 1787 as metropolitan of Moscow and Kaluga) Platon set about to change the situation, sometimes through personal intervention, other times via institutional reform. The new primer was a key element of the latter. The title *Načal'noe učenie čelovekom khotiaščim učitisia knig bozhestvennago pisanija* (*An Initial Book of Lessons for Someone Wishing to Study the Words of God*) had an obvious echo of Feofan Prokopovič's *Pervoe učenie otrokom* (*A First Book of Lessons for Youth*), the standard Russian primer for half a century which, to a large degree it was meant to replace. As with previous schoolbooks, it maintained the primacy of church orthography, and the assumption that the primary aim of learning the alphabet was to be able to read "*knig bozhestvennogo pisanija*". Nevertheless, it gave some space to *grazhdanskij sbrift* (secular orthography) almost as much as to *kirillitsa* (church orthography), and it included a *npravoučenie* in secular Russian.

Načal'noe učenie began with an abecedarium (*azbuka*) listing both alphabets, and then followed the traditional pedagogy of two- and three-letter syllables but only in kirillitsa, letter pronunciation ("az, buki, vedi", etc.). These syllabic lessons were followed by numeric ones that listed numbers, both "*tserkovnye i tsyfirnye*" (rendered both in religious letters and Arabic numerals) from 1 up to 10,000. It then provided a brief (6 line) exercise in skoropis' (shorthand) (of course, in kirillitsa), and then the *npravoučenie* in secular Russian. The booklet ended with a prayer in Church Slavonic, a statement on the symbols of faith, and then a prayer to Bogomater' (Theotokos, Mother of God) (all in Church Slavonic).

All the editions of Platon's text included these pages. But at that point the contents diverged into three basic variants: *azbuki* without catechisms; those with the abbreviated "*sokraščennyi katekhizis dlia obučenija otrokov*" (an abbreviated catechism for the edification of children) and those with the slightly longer "*kratkij katekhizis dlia obučenija malykh detei Pravoslavnomu khristianskomu zakonu*" (*A short catechism for the edification of young children studying Orthodox Christian Law*). Slight variations of these two catechisms also found their way into print. Platon also composed a separate catechism for clergy, as well as his earlier catechism written specifically for Tsarevič Paul. Here we see clear evidence of Platon's strategy of situating catechization at education's early stages and of crafting specific catechisms for specific sets of readers, an approach that diverged from Prokopovič's. Clearly, he hoped for catechization to reach everyone, and to cross over the literate/illiterate divide. In order for catechization to succeed he needed a more capable and literate village clergy than the one he inherited, that would be able to conduct oral catechism lessons and even explain the meaning of specific beliefs. It was to that end that he composed the clerical catechism, whose length included possible lessons and explanations that village clergy could use when instructing parishioners. That is, assuming that they read and understood them. His experience with printing

and circulating relatively large numbers of *poučitel'nye slova* (sermons) had been far from reassuring on that front¹⁰. So, catechization as speech alone remained a work in progress. But he was determined to reach all school children directly. Once again, his autobiography and diary make clear his regard for catechism, and he wrote almost reverently of the daily lessons in catechism that he had at seminary.

The decision to merge catechization and language instruction was not in itself an innovation for Russian pedagogy, of course. Prokopovič had done something similar in *Pervoe učenie*. But the manner in which Platon did it, as well as the tone of the texts, were his own. Both of the catechisms that were directed to youth in general were composed in *kirillitsa*. They offered simple questions and answers on the basics of faith. Both variants were more similar in form and content to Tuptalo's (Saint Dimitrij Rostovskij's) *Voprosy i otvety* (Questions and Answers) and, more distantly, Petro Mohyla's catechism from the 1640s, than to Prokopovič's *Učenie*. Where the former dwelled on personal faith, knowing God through heavenly intercessors, redemption, and respect of one's parents and elders, Feofan's *Pervoe učenie* was characterized by thundering commands to obey – mostly masculine – higher authority¹¹. In his rendering of the Ten Commandments, he insisted that the way to salvation was obedience, primarily to the Tsar, God's choice for the crown, the ruling father who superseded one's familial father. Tuptalo's catechistic message was quite different, and Platon appeared to embrace it. Platon, we know, felt a particular affinity toward Saint Dimitrij. He travelled to Rostov with the new empress in May 1763 to establish a shrine to the relatively new saint (beatified in 1757)¹², and some of his pedagogical writings seems to have emulated Dimitrij's example in articulating a relatively personalized (i.e., non-statist) and more intimate connection between Heaven and the individual believer.

Before delving into the publishing history, let us reflect a bit more about the pedagogy, specifically from the perspective of tradition and innovation, both in how it situated the two orthographies and in the juxtaposition of orality and reading¹³. What understanding of learning and literacy stood behind its

¹⁰ The archival record on these publications is quite extensive, and it shows a clear intent. Once published, the imprints went directly to the dioceses, and from diocese to parishes. Platon, and the Synod at large, wanted parish priests to use them as guides and to provide them with ready-to-go sermons to preach in church (Priests were expressly forbidden from composing their own sermons). The archive of the Synod Chancellery is littered with investigations and statements of exasperation by Synodal officials that the books, duly received, more often than not sat on the shelves unused.

¹¹ On Tuptalo's primer and the contrast with Feofan see my essay, *Catechizing in the Provinces: The Place of Mary in Dimitrii Rostovskii's "Questions and Answers"*, special issue of «Russian Literature» edited by Joachim Klein (forthcoming, 2014).

¹² P. Hauptmann, *Die Katechismen der Russisch-Orthodoxen Kirche. Entstehungsgeschichte und Lehrgehalt* (Göttingen, 1971), p. 49.

¹³ The classic study of spoken and read language is W. Ong's, *Orality and Literacy: The*

composition? On the face of it, *Načal'noe učenie* reproduced the existing model, i.e., to direct students first to the orthography, language, and texts of faith, and only secondarily to the ever-growing world of secular learning. The *nravoučenie*, composed in secular Russian orthography, is almost 100 lines long and is written as an instruction from a teacher to a student. At this basic level of instruction it would have been beyond the ability of a young learner to read on his or her own. In all probability the instructor would have read the lesson aloud, or would have conducted the class to read it aloud with him (or her). The Slavonic prayers, by contrast, might well have been familiar from liturgies. They too would have been chanted aloud, becoming memorized text rather than devotional private reading, much in the way that the old *Nakazanie* prescribed.

Catechization in itself would not have significantly diminished the primacy of orality since catechisms were meant to be spoken aloud, responsively and repetitively until the tenets of faith were memorized. A century ago A. Ezhov published a detailed study of eighteenth-century catechization in the journal *Strannik (The Pilgrim)*, and he concluded that memorization remained the litmus test for understanding¹⁴. Prokopovič may have hoped to change this when he produced his *Učenie*, but Ezhov and others have concluded that he made little or no progress in that endeavor¹⁵. Indeed, it is not at all clear that most village clergy had the knowledge or linguistic facility to catechize their parishioners at all before Catherine II.

Thus, modifications notwithstanding, *Načal'noe učenie* constituted as much a link with past practice as a break from it. Religious texts and prayer were primary, and orality (the names of the letters, chanting, memorization) held sway over textual recognition. With rare exceptions the catechism was produced only in church orthography, a clear indication of where one went next after mastering letters and numbers¹⁶. By all the evidence, writing was not

Technologizing of the Word, London, Methuen, 1982. More applicable to the situation in Russia, perhaps, is M. Clanchy, *From Memory to Written Record: England 1066-1307*, Cambridge, Harvard, 1979; and R. McKitterick, *The Carolingians and the Written Word*, Cambridge, Cambridge University Press, 1989.

¹⁴ A Ezhov, *O tserkovno-religioznom (katikhizicheskom) obrazovanii v Rossii [On religious (catechistic) education in Russia]*, «Strannik», September 1895, pp. 57-74; October 1895, pp. 237-53; November 1895, pp. 451-470; December 1895, pp. 681-700; January 1896, pp. 55-76; February 1896, pp. 232-262; March 1896, pp. 412-433; April 1896, pp. 587-613; May 1896, pp. 61-77; June-July 1896, pp. 272-289.

¹⁵ *Ibid.*, Oct. 1895, pp. 242-50.

¹⁶ According to V. A. Zapadov the Synod's St. Petersburg typography published a text entitled *Grazhdanskaia azbuka s kratkim katikhizisom i molitvami* [A Secular abecedarium with a Short Catechism and Prayers] specifically for use in schools in Tver, Novgorod, and Pskov in a run of either 2400 or 4800 copies. (S.K. Vol. 6, n. 454; V. A. Zapadov, *Kratkij očerk russoj tsenzury 60-90x godov XVIII v.*, «Učenyje zapiski leningradskogo pedagogičeskogo institute», n. 414, 1971, p. 108. Similarly, the appendixes in Gavrilov include one or two ambiguous listings that might possibly indicate a hybrid variant with catechism in the secular script. To date, I have not

a part of the curriculum on this step of the ladder, and there is no indication that Platon imagined his booklet as a *pismovnik* (*writing primer*), or that it was used as such. Still, its concession to modern numbers and letters is noteworthy as recognition that Russian spaces of even the most elementary learning in the parishes had to cross over into the now ubiquitous signifiers of secular texts. As symbolism alone, this blending of the two gateways, to sacred and worldly paths of knowing respectively, was important.

Platon made a similar gesture toward the secular in the seminary curriculum. As we have seen, he steadfastly defended the Latin course of instruction, even as other voices were beginning to call it outmoded. He also elevated the study of Greek and French and German, although they remained an elective subject, and one not usually taken¹⁷. But he did countenance instruction in Russian in some classes, and even allowed the students' public disputations to take place in Russian rather than Latin. Once again, Platon was not breaking entirely new ground, as the linguistic threshold had already been crossed a few decades earlier with the publication of Russian-language, civil orthography sermons. Printed homiletics had undergone major stylistic changes in the 1750s, as they moved away from their Scholastic foundations toward something approximating literary texts that spent as much space on the everyday as on Scriptural context. Composed by that very small minority of clergy formally sanctioned as *propovedniki* (homilists), these new style homilies were directed at a lay reading audience. Such compositions demanded not only facility with the literary language, but new kinds of rhetorical skills, that worked in this new arena. But these constituted a small body of authors and texts. Platon's core pedagogy, by contrast, was intended for every seminarian so as to guarantee at least a minimal facility with the language of state.

3. *The Publishing History of the Učenie and the Catechisms*

Usually, the *Svodnyi katalog russkoj knigi grazhdanskoj pečati XVIII veka* (The Union Catalogue of Eighteenth-Century Russian Books in the Secular Orthography, hereafter *SK*) has constituted the starting point for almost every sort of publishing history that we *knigovedy-dixuitiemistes* (specialists in eighteenth-century book studies) study. In this particular case, however, *SK* is of little help. It does not include a single separate listing for *Načal'noe učenie čelovekom* and only three for his catechisms (two for *kratkij katekhizis* and

uncovered a copy of the volume to which Zapadov referred, and the *SK* does not show any library holdings for it. I would hypothesize that Zapadov made a misattribution here, but there is no way to know for sure.

¹⁷ Pappmehl, *Metropolitan Platon of Moscow (Petr Levshin, 1737-1812)*, cit., p. 59.

one for *sokrashennyi katekhizis*)¹⁸. The splendid recent catalogue (2010) of *kirillovskie izdanija* (books in the religious orthography) by A.A. Guseva¹⁹, based upon an exhaustive inventory of library holdings, massively improves the previously available record and includes 450 imprints of books in general that were previously unrecorded. But it too is incomplete, particularly in regards to numbers and press runs for cheap unbound, and disposable workbooks, like abecedaria, that were “read to pieces”. We know from multiple sources that all three of the works in question circulated very widely over the last three decades of the eighteenth century. Guseva’s catalogue would seem to confirm this. We need, then, to pose some specific empirical questions based upon the raw archival record. First, who published them and in what frequency and quantities? Secondly, which variants were published the most? Third, where in general did the books go? Finally, is it possible to discern how were they used, and by whom?

The answers to the first set of questions can be found in the archives of the Synod chancellery²⁰, where I spent many months of research quite a few years ago. There one can follow the publishing histories of all imprints produced by the Synod’s own typographies for the entirety of the Synodal period, and via inventories even earlier, dating back to the early seventeenth century. Beginning in 1757, the main church typographies in Moscow and St. Petersburg were required to send quarterly reports to the Chancellery on the status of current and

¹⁸ SK, Vol. II, nos. 5358, 5359, 5359. These texts were also published a few times in the multi-volume collected works of Platon (usually in Volume 8). But these bound multi-volume sets were library editions rather than working tracts. Platon wrote several catechistic works, beginning with the catechism for the tsarevič in 1757. He also wrote a separate and somewhat lengthier (80 pages in quarto) catechism for clergy, *Sokraščennyi katekhizis dlia sviaščenko- i tserkovno sluzhitelei, kak dlia vsegdashniago ikh znanii, tak osoblivo dlia izčheniia pri vstuplenii ikh v tserkovnyia dolzhnosti, s pribavleniem* [An abbreviated Catechism for ordained and unordained clergy, both for their general knowledge and for their specific edification upon entering clerical service] (first printing, Moscow 1775). The two catechisms discussed here were intended for broader use among the laity. For more information see Hauptmann, pp. 49-53. There is a rapidly growing body of scholarship on the history of East Slavic Catechization overall. See in particular the very fine book by Margarita Korzo, *Ukrainskaja i belorusskaja katekhetičeskaja traditsija kontsa XVI-XVIII vv.: stanovlenie, evoliutsija, i problema zaimstvovanija* [Ukrainian and Belorussian Catechistic Traditions from the End of the Sixteenth through the Eighteenth Centuries: Formation, Evolution, and the Problem of Interconnectedness], Moscow, Kanon, 2007.

¹⁹ A.A. Guseva, *Svod russkikh knig kirillovskoj pečati XVIII veka tipografii Moskvy i Sankt-Peterburga i universal’naia metodika ikh identifikatsii* [The Union Catalogue of Cyrillic Books Printed in the Eighteenth Century in the Presses of Moscow and St. Petersburg], Moscow, Indrik, 2010. Guseva’s work fully replaces the 1968r catalogue by A.S. Zernova and T.N. Kameneva. There is also a somewhat dated, but still informative dissertation by T.A. Afanas’eva, *Svetskaja kirilličeskaja kniga v Rossii v XVIII veke (Problemy izdanija, repertuara, rasprostraneniija, čtenija* [Secular Cyrillic Books in Eighteenth-Century Russia: Problems of Publication, Repertoire, Circulation, and Reading], Candidate’s dissertation, Institut kul’tury im. Krupskoj, Leningrad, 1983, especially pp. 74-88.

²⁰ RGIA (Russian State Historical Archive in St. Petersburg), f. 796: (so long ago, in fact, that it was still) TsGIA: Central State Historical Archive in Leningrad).

forthcoming imprints, as well as regular sales and inventory reports that offered diocese-by-diocese listings for the sales and distribution of each title²¹. Among these titles one finds Platon's primer and catechisms, often in great quantities. These materials do not make for exciting reading, but when compiled they provide a clear profile of the production and distribution of *učebniki* (school books) (as well as all the other Synodal imprints) over a long stretch of time²². In a short paper such as this one can only offer a brief overview of these data, but they are very extensive.

To some extent one can also extrapolate their usage from institutional records and local demand. Platon's time as Metropolitan overlapped with a moment of intensified interest in primary education (approximately the last two decades of the eighteenth century), renewed concern over pedagogical methods, and considerable cooperation between church pedagogy and the network of state schools overseen by Catherine the Great's Commission on Public Education of which Platon was a *de facto* member). This momentum waned under Paul, but it established the basis for primary education under Alexander I, the new Ministry of Education, and the small network of formal parish schools that came into existence in his reign. But the key issue here is language and potential access to literacy, specifically literacy in secular Russian. Platon's practices in these spheres were dynamic, creative, and at times contradictory. The shared mandate of church and state education provided a platform for integrating catechization and literacy across church/state lines and on a much wider and more nuanced scale than before, one that brought the two Russian literacies closer to one another. No longer did it make sense to maintain three separate spheres of literacy based more-or-less on *čin* (social rank) or *sostožanie* (estate).

Let us now turn to the archival materials from the Synod Chancellery. They are voluminous and quite detailed, and only the barest summary is possible here. The simple *azbuka* (i.e., the old orthography, syllables, and simple words, without catechisms or texts) had long been the most widely circulated imprint dating back to the mid-seventeenth century. Between the late seventeenth century and the early 1770s, *pechatnyi dvor* (State Printing House) and its successor institutional typographies printed on average about 10,000 copies per year²³. Over the next thirty years the numbers took a considerable leap.

²¹ *The ukaz requiring these reports is in Rossiiskij Gosudarstvennyj Istoričeskij Arkhiv* [hereafter RGIA] f. 796, op. 56, no. 41, p. 1.

²² RGIA F.796 (Sinodal'naja kantseliarija), especially op. 58, no. 203; op. 60, no. 238; op. 61, no. 232. Figures for the Synod's St. Petersburg Press are somewhat more difficult to reconstruct, but for some partial figures one may consult the relevant appendixes in A.V. Garilov, *Očerki istorii St. Peterburgskoj sinodal'noj tipografii* [A History of the St. Petersburg Synod Typography], St. Petersburg, Sinodal'naja tipografija, 1911.

²³ These figures also come from RGIA f. 796, from a systematic inventory undertaken in 1777. On these see my articles *Primers and Literacy in Muscovy: A Taxonomic Investigation*, «Russian Review», 48, 1, 1990, pp. 1-19; *Faith and Secularity in Russian Literacy: The Consequences of Diglossia*, «California Slavic Studies: Christianity and the Eastern Slavs», II, Berkeley, 1995, pp.

Synod's Moscow typography produced well over a million copies of the multiple variants of Platon's *Načal'noe učenie*, or something over 30,000 per year. By the end of the eighteenth century the annual number hovered around 40,000, and in some years surpassed 50,000. The Petersburg typography added an additional 2400-7200 per year²⁴.

The documents also provide a fairly good picture of where the books actually went, and the answer is: everywhere. Unlike so many other imprints, circulation was not confined to major cities or leading monasteries. Titles that were considered educational (abecedaria, primers, catechisms, books of hours, and teaching psalters) went directly to the dioceses rather than being sold through the open market. Diocesan officials, in turn, distributed them to the parishes, collected the money and forwarded it to the Synod²⁵. This was fundamentally a demand driven mechanism, and the volume of sales constituted a reasonably accurate gauge of the volume of usage in the Empire. Thus, in 1793, 25,826 *azbuki s sokrashennym* (or *kratchaishim*, as the archival records refer to it) *katekhizisom* (in quarto and unbound) were put on sale; an additional 8390 were sold to Synod employees (*činovnikam*, functionaries); and 100 were sent to repositories or governmental agencies, for a total of 34,316 copies sold²⁶. In 1794, something over 24,000 copies were distributed, in approximately the same proportions²⁷. By contrast, the lengthier *azbuki s kratkim katekhizisom* sold just a few hundred copies each year (200 in 1793 and 198 in 1794), and *bukvari* (full primers) (otherwise unidentified in the records but probably Feofan's) sold only slightly more²⁸, clear evidence that the more abbreviated catechism was intended for a far larger body of students than the others. By 1796 the disparity was even greater, 41,000 copies vs. about 100!²⁹ Interestingly, the Synod did on occasion make secular abecedarian available in its bookshops, and these seem to have sold quite poorly. An inventory of back stocks from August 1789, for example, lists 4,142 *azbuki grazhdanskoj pečati* as having sat unsold for a long time, and the Chancellery suggests offering them at a deep discount³⁰. At this

3-24.

²⁴ These figures are aggregated from the annual reports of the Synodal presses: RGIA f. 796, op. 58, no. 203; op. 60, no. 238; op. 61, no. 232; op. 62, no. 262; op. 63, no. 198; op. 65, no. 187; op. 66, no. 243; op. 68, no. 238; op. 69, no. 224; op. 71, no. 171; op. 72, no. 196; op. 73, no. 207; op. 74, no. 257; op. 75, no. 213; op. 76, no. 235; op. 77, no. 249; op. 78, no. 354; op. 79, no. 430.

²⁵ A 1765 investigation of the sales and publishing practices of the Synod provided a detailed summary of the various modes of distribution; RGIA f. 796, op. 45, no. 272, *Po prikazaniyu o pečatanii na imeeshikhsia zdes' knigopečatnykh stanakh dlia prodazhi v narod*, pp. 18-27.

²⁶ RGIA, f.796, op. 74, no. 589, 29.

²⁷ RGIA f. 796, op. 75, no. 536, 28-29.

²⁸ One inventory from October 1793 says that sales of *bukvari* had averaged 717 copies over the previous three years, but other inventories seem to show a lower figure. RGIA f. 796, op. 74, no. 436, 1-2.

²⁹ RGIA f. 796, op. 77, no. 677, 34-35. The figures for 799 were similar. RGIA f.796 op. 80, no. 957, 33 (*azbuki*), 24 (*bukvari*).

³⁰ RGIA f.796, op. 70, no. 286, 2, 5.

late date the market for these exclusively secular-orthography azbuki remained small, an indication of the endurance of old patterns and approaches to literacy.

There is another significant element to this story, involving the nexus linking the Synod Chancellery (especially Platon) and the Commission on Establishing Public Schools that Catherine the Great had founded in 1782. Let us recall that the latter had its own aggressive publishing mandate. Although its primary clientele was its own student body (totaling about 100,000 students at all levels during its twenty + years in existence), its mandate and curriculum were ambitious, legally commanding the Commission to guide virtually all primary and secondary education throughout the Empire, including *pansiony*, *gimnazii*, *kadetskie akademii* (private schools, gymnasia, Cadet Academies), and to some extent even seminaries³¹. Thus, the shift from separate spheres of learning by *čin* to something more universal placed Platon, as the agent of the church, shoulder to shoulder with Jankovič, the state's agent.

In the end the Commission fell far short of this mandate, and failed even to keep its own students in the classroom beyond the first couple of years. Still, it was a dynamo when it came to publishing schoolbooks. This profile included abecedaria, primers and catechisms, a combination of Platon's texts and those compiled by Jankovič de Mirevo. More to the point, they included numerous titles printed in secular Russian, evidence that the crossover of languages was expanding rapidly. These parallel programs, in fact, cooperated closely, buying and distributing each other's publications. Hence, distribution tables from the late 1780s and 1790s show that the Synod sent literally thousands of volumes to seminaries on behalf of the Public School Commission³². In return, the Commission actively disseminated Platon's catechisms, *slova* and *poučenija* to its students, as early as their second year of instruction. The program's capstone text, *O dolzhnostiakh čeloveka i grazhdanina*, maintained a strong religious strain, a vague mixture of Pietism, reform Catholicism (Jankovič's creed) and Orthodoxy à la Platon, who had final approval over the book's content.

Jankovic also produced his own primer (*Rossijskij bukvar*), a handbook on pedagogy (*Pravila dlja učaščikhsia v narodnykh učiliščakh*) and a variety of *propisi* (writing guidebooks) (mainly *Rukovodstvo k čistopisaniju*, which saw at least four eighteenth-century printings). These texts are well known in the scholarship, and there is no need to dwell on them here. Essentially a translation of his earlier Serbian primer, Jankovič's *Rossijskij bukvar* followed the familiar format, but it focused on secular Russian and secular orthography, rather than *kirillitsa*. It had nine eighteenth-century printings,

³¹ The Commission has been fairly extensively researched. The figures included in this paper are drawn from the Commission's archive (F. 730 in RGIA), and summarized in my essay, *Who Rules the Word?: Public School Education and the Fate of Universality in Russia, 1782-1803*, «Russian History», 20, 1-4, 1993, pp. 15-34.

³² E.g., RGIA f.796 op. 70, no. 155. "Delo o istrebovanii v Sv. Sinod dlja rassylki v eparsheskija seminarii ot Kommissii o narodnykh učiliščakh".

totaling something approximating 100,000 copies³³. Most of these texts went to the state schools, but the Synod circulated a proportion of them as well, a clear indication of Platon's model of collaboration. Indeed, in 1797 Moscow University Press published a one-off secular-script catechism (*Sokrashennyi katekhizis*) attributed in *SK* to Jankovič but almost certainly an adaptation or translation of Platon's work³⁴. None of this drew objections from the Synod, except when an unauthorized edition appeared.

So now there were multiple sites of catechization-cum-literacy and, thanks to the collaboration between Platon and Jankovič, multiple avenues of distribution. All of this was rather new. Which variant, then, did they tend to use? Two trends jump out. First, by the mid-1770s the simple variant of *Načal'noe učenie* (i.e., without a catechism) simply disappeared from circulation. Henceforth there would be no literacy instruction (at least insofar as the Synod had a role) without catechization, at least in principle. This, too, was new. Secondly, the catechism of choice, by an overwhelming margin, was *azbuka s sokrashennym katekhizisom*. Simple aggregations from the archival records tell the story here. Between 1767 and 1799 the Synod's Moscow typography produced a total of 30,000 copies of the *kratkij katekhizis* (printed in 1771, 1777, 1779, 1780, 1783, and 1788). Over that same time-span it produced approximately 700,000 copies of the *sokrashennyi katekhizis*. These came out at least once a year, and as often as five times a year, depending upon the rate at which stocks depleted. The St. Petersburg typography produced nine imprints of catechisms between 1775 and the end of the century, with an aggregate run of 32, 400 copies. All were *sokrashennye*. The records of both the Synod and the School Commission show quite vividly that these books flowed widely throughout the Empire, to parishes and state institutions alike. The ultimate audiences were decidedly not dominated by children of the elites. Rather, local reports reveal, they went to a mixture of *popoviči*, children of *činovniki*, *soldatskie deti* (soldiers' children), and other offspring of middling groups. Occasionally the local *blagočiniija* (provincial police) had to round up these students and drag them into the classrooms (the archive of the Commission – f. 730 in RGIA – is full of such accounts). But one way or another, the expansion of institutionalized schooling and parish teaching during the 1780s and 1790s effectively exposed a far larger number of the Empire's school children to a pedagogy of literacy-cum-catechism than had ever been so before.

³³ *SK*, Vol. III, nos. 6761-6785.

³⁴ *SK*, Vol. III, no. 8790.

4. *Conclusion: Literacy and Enlightenment Revisited*

By the mid-1780s the segregation of church Russian from secular Russian had diminished quite substantially, and irreversibly. The boundaries (linguistic, pedagogical, and institutional) still existed, but they had become far weaker and more porous than before. No one seriously imagined that the two would ever merge or that the liturgical language would be open to change. But henceforth it was increasingly likely that parish students would gain early exposure to secular Russian as the functional language of choice outside of churchly spaces. In return, all students would undergo catechization, learning the primacy of God, the mysteries of faith, and salvation over earthly reason. And they learned these lessons via the church orthography, language of prayer, and traditional rote-based pedagogy. In the Cadet Academies and gymnazia, we know quite well, these lessons once learned were often forgotten, as educated Russia moved firmly in the direction of the literary language and modern modes of sociability. It was against this phenomenon that Nikolaj Novikov, Ivan Lopukhin, Aleksandr Labzin and other freemasons of similar temperament complained so bitterly. But in the public schools and parishes alike, Platon's merging of catechization and literacy held firm, as the necessary and unavoidable gateway to reading.

In the last analysis, was this set of practices 'Enlightened' in any meaningful sense? This is a complicated question, and the answer to it is equally complex. On the one hand Platon's determination to engage with secular language and culture at multiple levels demonstrated an acceptance, even embrace, of Enlightenment. Further, his moral lessons manifested attentiveness to everyday life and the possibility of human agency, both of which are consistent with the Enlightenment. On the other hand, he rejected the elevation of human reason over divine, and his catechisms were devoted almost entirely to knowing God, redemption, and salvation, the basic creeds of the church. Moreover, by interposing the catechism into the existing ladder of literacy, he reinforced its religiosity. In the end, though, he effectively reinforced the religious element, in the direction of substance over form, understanding over performing. Such a set of practices seems rather disconnected from the guiding assumptions of the Enlightenment, Russian or European, unless one wishes to argue for a specifically Orthodox Enlightenment in Russia. In the last analysis, I would argue that Platon's pedagogical practices are best characterized not so much as a product or inspiration of the Enlightenment, but more as an embrace or accommodation to the linguistic and cultural realities of Catherinian modernity.

The primer at the cultural crossroads: an early stage in the history of school books in Karelia (late 19th-early 20th centuries)*

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ABSTRACT: The paper exposes the effect of the 'Finnish factor', the neighbourhood of Russian Karelia and Finland on the making of study books for Karelian schoolchildren in the late 19th-early 20th centuries. We demonstrate how the controversy between the Orthodox and the Lutheran Church in the border region influenced the choice of the character set for the Karelian language alphabet. The core of the paper is a comparative analysis of the content of two primers for schools in Karelia, one of which was published in Finland and the other one in Russia early in the 20th century. In addition to the thorough analysis of the early stage in the history of schoolbooks in Karelia, later periods have also been outlined.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; History of Education; Karelia; USSR; Finland; XX Century.

The history of primers for Karelian schoolchildren, which is only slightly longer than a century, can with every reason be called dramatic. The fates of the schoolbooks were affected not only by pan-Russian 20th century catastrophes –

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revolutions and wars – but also by the border between Karelia and Finland. The national border, which partially concurred with the border between cultures and mentalities, turned this region into a zone of political rivalry and confrontation, which also had an effect on linguistics and the educational system. As a result, both the Karelian alphabet and the primer for Karelian schoolchildren were not just a subject matter for academic disputes, but also fell victim to political manipulations. Some collisions related to the attempts to create the Karelian alphabet and primer in the 19th-early 20th cc., and the overall approaches to handling these matters were later on – in the Soviet and post-Soviet times – reproduced quite recognizably in other sociocultural and political contexts. In this paper we shall mainly limit ourselves to the early stage in the schoolbooks' history in Karelia, providing just a very general outline of its later periods.

Karelians, who at that time mostly lived on the two sides of the Russian-Finnish frontier, found themselves at the crossroads of the political and cultural interests of Russia and Finland, the metropolitan state and the Grand Duchy of Finland (GDF), which had been part of the Russian empire since 1809. Throughout the 19th century Finnish interest in Karelians and Karelia has been growing from the eagerness to know more about their own history and cultural background to the idea of uniting the related nationalities. The thought of creating a 'Great Finland' by merging Russian Karelia (its White Sea (*Viena*) and Olonets (*Aunus*) parts)¹ to the Grand Duchy was voiced by a prominent member of the Finnish nationalist movement, writer, journalist and educator, author of some elementary school textbooks Zachris (Zacharias) Topelius in 1843². It had many followers among Finnish nationalists.

In the late 19th century there was a phenomenon in Finland termed 'Karelianism' in the literature. Finnish romanticists – linguists and ethnographers, artists, writers and poets – were eager to go Karelia, and the conclusion from their travels was that the «oppressed Karelian people» were in need of help³. Any ideological intervention by Lutheran Finland caused an immediate response, first of all from the Orthodox Church and its institutions.

¹ Those parts of Russian Karelia that adjoined the Grand Duchy of Finland. Administratively, these areas with Karelian population were comprised in the Archangelsk Province (Archangelsk or *Viena* Karelia) and Olonets Province (*Aunus* Karelia). On the other side of the border, Karelians lived on the northern coast of Lake Ladoga. Other areas in Russia with compact Karelian population were in the Tver and Novgorod Provinces.

² M.A. Vituhnovskaâ, *Rossijskaâ Kareliâ i karely v imperskoj politike Rossii, 1905-1917*, St.-Petersburg, Norma, 2006, p. 23.

³ *Ibid.*, pp. 25-30.

1. *First abecedary for Karelians*

Speaking of progress in education for ‘inorodcy’⁴ in Russia in the second half of the 19th century one would normally mention Nikolaj Ivanovič Il’minskij (1822-1891), a talented linguist and zealous missionary, who taught Arabic and Turkic languages at the University of Kazan and the Kazan Theological Academy. Il’minskij’s ideas on educating non-Russians were taken as the basis for the Decree of the Ministry of Public Education of February 2, 1870, which for a long time governed the language policy in schools⁵. Since Il’minskij’s method promoted the integration of non-Russians into the extensive imperial community and their Russification, it was closely scrutinized and approved not only by the Minister of Public Education D. Tolstoj, but also by Emperor Alexander II of Russia. Later on, in the reactionary political climate of the 1890s, Il’minskij’s method suffered persecutions, and its application outside of the Kazan school district declined sharply. The main reading book in schools of Russian Karelia was M. Volper’s ‘Russian Speech’, tailor-made for non-Russian schools. Literacy instruction in this period was based on the ‘native’ or ‘natural’ method (detractors nicknamed it the ‘mute’ method), which was alternative to Il’minskij’s translational method and completely eliminated the native language from the learning process⁶.

In contrast to most national territories in Russia, attempts to implement Il’minskij’s method were persistently taken in the Archangelsk Province (and in the Kazan school district, too) in the 1890s. The ideologist of this work was Bishop Nikanor – former chairman of the Kazan Missionary Society Guriâ, Il’minskij’s associate and follower. In 1893 he founded a local committee of the Orthodox Missionary Society in Archangelsk, which included a translation commission made up of priests who knew the national languages of the Archangelsk North⁷.

Motioned by the missionary society to apply Il’minskij’s system, attempts were made to create the Karelian language alphabet and publish brochures with

⁴ According to the laws of the Russian Empire ‘inorodcy’ were Russian subjects belonging to non-Slavic ethnic groups.

⁵ Determined to shore up the national languages of the Volga region against the Tatar language, with its Islamic message, Il’minskij concluded that they should be transformed into written languages based on Cyrillic characters, which were perceived as the ideographic representation of Orthodoxy. Thus, the essentially Cyrillic Russian alphabet, as the alphabet of Orthodoxy, would become a shield against the Islamicizing Arabic alphabet of the Tatar Moslems, and linguistic diversity served as a bulwark against Tatar universalism. Il’minskij own desire to preserve the local languages was motivated largely by missionary but also linguistic considerations. See: W. Dowler, *The Politics of Language in Non-Russian Elementary Schools in the Eastern Empire, 1865-1914*, «The Russian Review», vol. 54, 1995, p. 518.

⁶ For details see: O.P. Ilûha, *Škola i detstvo v karel’skoj derevne v konce XIX – načale XX veka*, St.-Petersburg, Dimitri Bulanin, 2007.

⁷ A.G. Bazanov, N.R. Kazanskij, *Missionery i missiionerskie školy na Arhangel’skom Severe: istoričeskie očerki*, Archangelsk, Severnoe krajevoe izd-vo, 1936, pp. 45-47.

parallel text in Karelian and Russian. In 1894, the *Abecedary for Karelians living in the Kem' Uezd, Archangelsk Province* was published in Archangelsk. The book was meant for parish schools⁸. Its authors were priests M.A. Userdov, N. K. D'âčkov, P. Preobraženskij. The abecedary was made up of three sections. The first one was devoted to the Karelian language: Karelian sounds were rendered through Cyrillic characters; the second section repeated the same content in Russian; and the third one contained parallel Russian and Karelian versions of prayers⁹.

The missionary committee was also motivated to hurry with the abecedary and some other editions for Karelians¹⁰, as the Orthodox Church was concerned about the arrival of Lestadianism (a Lutheran 'revivalist movement') in Viena Karelia¹¹. The ideas were imported to the North of Russian Karelia in the 1870s by local peddlars who used to trade in Finland. Lestadianism had for a long time remained latent in the area but has been clearly on a rise since 1893¹².

The abecedary employed the principle suggested by Il'minskij, where the literature for baptized Tatars was printed in Cyrillic to cut off the Arabic-based Tatar Moslem culture. The same method was now used to prevent the dangerous influence of Latin-based Lutheran culture on Orthodox Karelians. An obvious strength of the abecedary was that it was based on the learners' native language. However, both linguistically and didactically the book had too many faults and its application in schools was a failure. School authorities had to admit the brochure was unsuitable for teaching¹³.

2. Finnish primer for Viena Karelia

Events of the first Russian revolution added a political perspective to Finnish interest in Russian Karelia. The revolution and the Religious Tolerance Act it brought about (April 1905) opened a new era in the struggle for the souls

⁸ In the same period, the missionary society published the *Abecedary for Samoyeds living in the Archangelsk Province* and the *Abecedary for Lapps living in the Kola Uezd, Archangelsk Province* (1895).

⁹ A.P. Barancev, *Karel'skaâ pis'mennost'*, in M. Mullonen, V. Ollykainen (edd.), *Pribaltijsko-finskoe âzykoznanie: voprosy fonetiki, grammatiki i leksikologii*, Leningrad, Nauka, 1967, p. 94.

¹⁰ In addition, four Gospels and the *Brief Sacred History of the Old and the New Testament* were published in 1895-1900 with parallel texts in Russian and Karelian.

¹¹ Lestadians were the followers of the Swedish pastor Lestadius, who preached in the mid-19th century. The key requirements of the doctrine were simple: obey the Scripture, live a temperate and moral life. The role of the Church was confined to the most basic rituals.

¹² I. Čirkov, *Uhtinskij prihod v religiozno-nravstvennom i bytovom otnošenii*, «Arhangel'skie eparchial'nye vedomosti», vol. 7, 1908, pp. 205-206.

¹³ The Abecedary was not mentioned in the lists of books used in schools either late in the 19th or early in the 20th century.

of *inorodtcy*. Finnish activists openly practiced their propaganda that Russian media tagged ‘pan-Finnic propaganda’ or ‘Lutheran approach’. The interests of the counterparts (who called each other ‘Finnicizers’ and ‘Russifiers’) covered different spheres and levels. One of such spheres, where the antagonists competed, was public education, school. The struggle was not limited to ideas and religion; it concerned also the language of instruction and the choice of the alphabet.

Finnish Lutheran missionaries and preachers used the concessions the monarchy had to make during the first Russian revolution to come to Russian Karelia. Educational activities in Karelia were organized by the Union of Viena Karelians (Finn. *Vienan karjalaisten liito*). This organization was founded in Tampere in 1906 by Viena Karelians, primarily merchants, who had moved to Finland. Its aim was to bring Karelian volosts as close to Finland as possible, to support nationalist, spiritual and material aspirations of their fellow nationals, to promote the «tribal spirit of oneness of Karelians and Finns». To fulfil their programme in what concerned schools the Union established a special School Board. In the autumn of 1906 the Union of Viena Karelians began organizing in the Archangelsk Province mobile schools with Finnish as the language of instruction, libraries and reading rooms with books from Finland¹⁴.

The gatherings and protest meetings of peasants in Viena Karelia in December 1905 – January 1906 formulated the following demand: instruction in educational institutions should be in the native language. Interest in studying the Finnish language was communicated. The Russian Orthodox Congress in Kem’ in September 1907 expressed concerns that Karelians’ familiarity with the Finnish language may be ideologically harmful, acting as a «vector of Finnic ideas». Yet, the possibility of teaching Finnish for its practical significance as an «optional subject for Karelian children who had completed the elementary school programme in the additional fifth grade» was recognized¹⁵.

In February 1907 the Union of Viena Karelians published the Finnish-language primer *Little Guidebook for Viena Karelians*¹⁶. It was subtitled «For teaching reading. An aid for beginners». One of Finland’s biggest publishing houses Werner Söderström Oy printed 10 000 copies of this book. Board members of the Union of Viena Karelians Paavo Ahava, Oskar Adolf Forsström-Hainari and Lauri Pääkkinen contributed to the preparation of the primer¹⁷.

¹⁴ H. Sihvo, *Nacional’nye problemy Karelii*, in H. Krikinen, P. Nevalainen, H. Sihvo (edd.), *Istoriâ karel’skogo naroda*, Petrozavodsk, PetrGU, 1998, pp. 201; R. Ranta, *Vienan Karjalaisten Liitto ja rajantakainen koulukysymys 1906-10*, in K. Julku (ed.), *Rajamailla IV*, Rovaniemi, Pohjois-Suomen historiallinen yhdistys, 1998, pp. 123-125.

¹⁵ Nacional’nyj arhiv Respubliki Kareliâ [Republic of Karelia National Archives], Fond 1, Op. 1, Delo 102/2, l. 30.

¹⁶ *Pieni Alku-opastaja Vienan Karjalaisille*, Porvoo, WSOY, 1907.

¹⁷ Paavo Ahava (Pavel Afanas’ev) was born in the Village of Uhta, Viena Karelia, and was a merchant and pedlar. Dr. Oskar Adolf Forsström-Hainari taught at the Sortavala Teacher’s Academy, which was one of the centres of pan-Finnic movement and an outpost of ‘national

The compilers of the primer wrote in the foreword:

Viena Karelia is in painful need of the living conditions improved. People there suffer a food deficit, primarily because they lack education. The people of Karelia, who are spiritually rich by nature and hunger for knowledge, lag behind their brothers and sisters next door in practically everything. Having realized this, and stirred by brotherly feelings, the Union of Viena Karelians has published the «Little Guidebook for Viena Karelians». This book is meant to open the treasures of knowledge to Karelian homes. Each Viena Karelian who loves their native land and language should do their best to disseminate literacy in villages of Karelia using this book. Let us present knowledge and learning as a gift, for we have also received them as a gift. It is a fact that the more we transfer knowledge and learning to others the more we get ourselves. The «Little Guidebook» is the first one of its kind, and is probably not fault-free. With all its faults and errors it shall now go to the Karelian people to meet a great many well-wishers and numerous friends.

The book was disseminated in Karelia by travellers and pedlars after the publishers had been granted Russian censorship permission to do so in March 1908. Later on, when the activities of the Union were impeded in Russia, the book was also persecuted¹⁸. It appears the primer was confiscated before it even reached the schools of Russian Karelia¹⁹.

3. Reaction to ‘pan-Finnic propaganda’ in Russia: growing attention to the Karelian language

‘Pan-Finnic propaganda’ and other events triggered by the revolutionary situation of the early 20th century revived the interest in Il’minskij’s ideas. In August 1906 already, the 2nd Congress of the Olonets Province Public Vocational School Inspectors remarked that the currently used study books were not suited to teaching in Karelian schools²⁰. The Congress of Public Vocational School Inspectors, Olonets Zemstvo (local self-government) and the Clergy in June 1908 recognized the knowledge of the local language was *necessary and mandatory* for the teacher²¹. To fulfil these tasks, the Karelian language and

education in the East’. Lauri Pääkkönen was a teacher in the Finnish public school, and was also known as a writer.

¹⁸ S. Vuoristo, *Suvulta suvulle II. Wienan Karjalaisten Liiton / Karjalan Sivistysseuran historiaa vu. 1906-1996*, Helsinki, Karjalan Sivistysseura, 1996, p. 101.

¹⁹ M.I. Bubnovskij, *Kontur Arhangel’skoj Karelii*, Archangelsk, Gubernskaâ tip., 1914, p. 41.

²⁰ *Postanovleniâ vtorogo s’ezda inspektorov narodnyh učiliš Oloneckoj gubernii 21-26 avgusta 1906 g.*, Petrozavodsk, s.n., 1907, pp. 57-60.

²¹ *Trudy tret’ego s’ezda inspektorov narodnyh učiliš Oloneckoj gubernii. 3-8 iünâ 1908 g.*, Petrozavodsk, 1908, p. 61. A year earlier, Director of Public Vocational Schools G.A. Popov elaborated on the extent of the Karelian language knowledge desirable for a teacher: «The teacher in a Karelian school should be somewhat familiar with the Karelian language to be able to understand local people and fairly easily explain various notions to children, but instruction in the

the methods of teaching Russian to *inorodcy* were added to the curricula of the Petrozavodsk Teachers' Academy and some other teacher training institutions.

The Orthodox Church, the Ministry of Public Education and local self-government actively engaged in promoting Karelian language studies and preparation of various study books for schools. Publishing in the Karelian language was practiced by divisions of the Karelian Orthodox Fraternal Society: St. Michael's in the Archangelsk Province, St. George's in the Olonets Province and in Finland. Both societies had their own publishing commissions²². When translating into the Karelian language, translators encountered the problem of lexical deficit, especially when trying to render theological concepts. Finding no analogues in the Karelian language, they resorted to Finnish words but «made them sound Karelian». This practice gave rise to debates on whether the Latin alphabet could be used. This discussion, which mainly ran between the clergy of the Finnish Diocese of the Russian Orthodox Church on the one hand and representatives of the Synod on the other, largely echoed the reasoning given 30 years before that, when Il'minskij and his associates began working on the script for *inorodcy* in Russia. Back in the 1870s the Synod had cast out the arguments that the Latin alphabet was more suitable for portraying Karelian sounds. When choosing the pro-Cyrillic arguments the focus was on the semantic tinge of the alphabets (the alphabet was viewed as a matrix incorporating the cultural codes of the related religious doctrines). While rejecting scientific reasoning, the manipulative political rhetoric emphasized the deep political and patriotic essence of the Russian alphabet as the «governmental alphabet, which can unite nationalities, and hence bind nationalities by the state language, too»²³. Thus, the alphabet was expected to bridge the native and the Russian languages.

Vivid evidence of the increased awareness of the ideological tasks of the school is the memo 'On the current condition of Karelians as a special nationality, and on the basic guidelines to be used in schools of Karelia for more successful learning of the Russian language by Karelians' written by V. Krohin, Special Missions Officer for the Finnish Governor General, and addressed to the Minister of Public Education. (January 18, 1908). Krohin was convinced that the written language of Karelians, who were «Russified so much that they are now closer to Russians than to Finns, and often even call themselves Russians», should be based on the Cyrillic and developed through the addition of the letters ä, ö, ÿ to the Russian alphabet to render the soft sounds of the Karelian language. Another passage of his note refers to children as an object of clearly political

Karelian language is totally unacceptable: it must always be carried out in the Russian language». See: G. Popov, *O panfinskoj propagande i merah dlâ bor'by s neû*, Petrozavodsk, s.n., 1907, p. 13.

²² Starting 1908 the Fraternal Society published a dozen a half brochures in different Karelian dialects bearing moral-religious message, including a manual for Scripture teachers in Karelian schools. Nearly all the editions had parallel Karelian and Russian texts.

²³ From correspondence concerning the application of the Russian alphabet to the languages of *inorodcy*, Kazan', 1883.

interest: «Printing Karelian text in Russian characters is especially important as it shall imprint in Karelian children the idea of identity between their Karelian and Russian in general, and shall rob Finns of the possibility to transfer pan-Finnic ideology to Karelians»²⁴. Application of the Cyrillic alphabet to render the Karelian language fixed the idea of kinship between Karelians and Russians at the subconscious level. An alphabetic character turned into a symbol of Russia.

Due to the imperfections of the alphabet, the underdeveloped grammatical norms, and the diversity of vernaculars within the proper Karelian dialect spoken by Northern Karelians the texts of the books published by the Fraternal Society were not always clear to Karelian peasants and schoolchildren. The premises for the emergence of the literary form of the Karelian language were still missing at that phase. First of all, there was no theoretical baseline, since linguistic studies of the subject were just beginning²⁵. A factor hindering the establishment of common grammar norms for the language was the diversity of vernaculars and dialects, and, most importantly, the lack of qualified personnel. Yet, the active translation efforts of the time were an enterprise of quest and creativity. They could have become a nursery of the literary Karelian language hadn't it been for the social cataclysms of the subsequent periods.

4. V.M. Nikol'skij's primer for Karelian children: Russian response to Finnish challenge

Thus, publication of the primer *Little Guidebook for Viena Karelians* in Finland has catalysed the surge of efforts to produce study books for Karelian schools. However, it took awhile to deliver an 'adequate response' to the challenge from Finland. The revolution was followed by reaction, which in 1910 spurred members of the Olonets Council of the Karelian Orthodox Fraternal Society to demand that any use of Karelian speech in schools must be avoided after the first trimester of the academic year. The regulations for elementary schools for *inorodcy* passed by the Ministry of Public Education on June 11, 1913 eliminated all the previous liberal concessions to such schools. They stated that the wide use of the *inorodceskij* language in schools is «contrary to the interests of the state, and to the dignity of Russian as the state language». They instructed that teaching in Russian should begin as early as possible. The

²⁴ Rossijskij gosudarstvennyj istoričeskij arhiv [Russian State Historical Archives]. Fond 733, Op. 175, Delo 408, l., 1-2.

²⁵ Finnish scholar Arvid Genetz laid the basis for Karelian linguistics with his papers *A Study of the Karelian Language in Russia* (Helsinki, 1880) and *A Study of the Livvi Dialect* (Helsinki, 1894).

regulations allowed people without knowledge of the *inorodcy* language to be teachers²⁶.

These decisions ran counter to the evolution of didactic ideas. The session devoted to *inorodcy* at the 1st All-Russian Congress on Public Education in Petersburg in December 1913 produced a resolution proclaiming that the native language should be widely used in schools as the basis for the development of an accomplished personality, and application of the ‘natural’ method of teaching the Russian language was recognized as the key reason for estrangement of non-Russian population from school²⁷.

Apparently, publication of the Russian primer for Karelian children in 1915 was an echo of these attitudes in the community²⁸. Its author was a missionary of the Karelian Orthodox Fraternal Society Viktor Nikol’skij²⁹. In terms of its contents the primer had a ‘Great Russia’ spirit, but in contrast to Volper’s primer used in the schools of Karelia previously it contained the Karelian language, the native tongue. That was undoubtedly a big achievement for the time being. Compared to the first ‘study book’ – *Abecedary for Karelians Living in the Kem’ Uezd* – Nikol’skij’s primer was far more advanced in its substance, didactic approach and printing quality.

The work on the study book took a long time due to the problems named above: lack of studies on the Karelian language, and the twists and turns of the language policy. Judging by the label «author’s edition» on the title page and the fact that Nikol’skij himself distributed the book, the author probably had to pay his own money for printing the book at the St. Petersburg Synod Printing House. This is not surprising given that it was the second year of the world war, which made the government and the church curtail the funding for educational projects dramatically.

Thus, early in the 20th century two primers were published for Karelian schoolchildren: one in the peripheral grand duchy rather hostile towards central authorities, and the other one in the metropolitan state. Publication of the first book was at least indirectly an impetus for the second one to appear. Nikol’skij’s primer was in a way a response (although admittedly belated) to the challenge from across the border.

²⁶ S.I. Antsyferov, *Spravočnaâ kniga po nizšemu obrazovaniû*. Part 1, Petrograd, Senatskaâ tip., 1916, p. 89.

²⁷ *S”ezd po narodnomu obrazovaniû*, «Žurnal ministerstva narodnogo prosvešeniâ», April 1914, p. 243.

²⁸ V.M. Nikol’skij, *Bukvar’ dlâ obučeniâ russkoj gramote karel’skih detej. Pervyj opyt obučeniâ inorodcev po prirodno-zvukovomu metodu russkoj gramote*, Petrograd, 1915.

²⁹ V.M. Nikol’skij graduated from the Olonets Theological Academy in 1898. Served as a rural priest in the Olonets Diocese. Known as a missionary of the Karelian Orthodox Fraternal Society, translator of the Scripture study book for Karelian schools. The author of ethnographic papers about Karelians.

5. *The two primers: an attempt at a comparative analysis*

Let us skim both primers, one of them published in Petrograd, and the other one in Porvoo, not far from Helsinki, and try to find out how each one of them pictured the world, and what means they employed to build the desired identity in Karelian children. The strengths and weaknesses of their teaching methods are beyond the scope of this analysis.

General characteristics

Both books are of the same format and similar size (64 pages in the Finnish primer and 77 in the Russian), both are supplied with graphical illustrations. Both primers are imbued with patriotic spirit and both contain a religious component. Both the first and the second primers make use of classical literature: Finnish and Russian, respectively (not stating the authors of the literary works in either of them). The Russian primer offers excerpts from works by A.S. Pushkin, A.N. Pleshcheev, L.N. Modzalevsky, I.A. Krylov, the Finnish one – by J.L. Runeberg ('Finnish Pushkin'), P. Hainikainen, Z. Topelius.

What else do they have in common and where do they differ?

The mission. Use of the Karelian language

The Finnish primer was designed to teach Karelian children³⁰ to read and write in the closely related Finnish language. Both the Finnish and the Russian alphabets are presented in the book. Karelian words are occasionally present in some texts (in Finland Karelian dialects have traditionally been regarded as a part of the Finnish language). There is a Karelia fairy-tale, several Karelian proverbs and riddles (whereas Finnish ones are a majority), runo songs from Kalevala – the epic made up of Karelian epic songs treated by Elias Lönnrot for Finns. Finnish folk and literary fairy-tales are widely used. It is safe to say that the Karelian component in texts of the Finnish primer is minimal. The primer is a compilation of texts and figures borrowed from study books for Finnish elementary school (as has been mentioned, two of its three authors worked in Finnish public education).

The Russian primer was to teach literacy in Russian – a language very different structurally and difficult for Karelians. The book includes the Russian alphabet and the Cyrillic alphabet of the Karelian language. Karelian is used as a tool for learning Russian (page after page the learners are gradually led from the Karelian language to Russian-Karelian equivalents and parallels, and

³⁰ The primer was also expected to be of use for adults willing to learn reading and writing.

then to the Russian language). There are Russian folk tales, Russian proverbs. Illustrations were borrowed from Russian children's literature, namely from the primer by D.I. and E.N. Tihomirovs³¹.

The religious component

The Russian primer frequently refers to God, and includes the texts of the most popular Orthodox prayers and the children's prayer poem:

Spare, dear God, / My mother, / Sisters, farther / And all the people. / Give me, dear God, / Patience in everything, / Zeal for learning / And a humble nature. / Give me the talent / To please everybody, / To love the miserable, / And to console them.

This text is an instruction on the qualities that a pupil must aim at. Patience, humbleness, obedience were the features of an ideal child.

The religious content was a challenge for authors of the Finnish primer, since it was the faith that was the dividing line between the Karelian and the Finnish cultures. The solution they chose was the ancient pagan god Ukko. This reference to the 'roots', the religious origins united Lutheran Finns and Orthodox Karelians. Spell-prayers from Kalevala play the role of religious texts in the primer.

Quite conspicuous are the appeals to God reaching beyond personal needs and interests. In the Russian primer they are 'God save the Tsar!' under the portrait of Nikolai II, as well as the 'Prayer for the Tsar and the Homeland', in the Finnish primer – the supplication for peace at the border:

Thou, the great master Ukko, / The Lord of the sky, / bring peace to the borders, / good amity to Finland, / peace to the troubled borders, / The Word to the beautiful Karelia! / If thou bring peace to the borders, / good amity to Finland, / there shall still be likeable men, / bridegrooms who can speak, / for plowing and for sowing, / for planting seeds; / Then no crying shall be heard from side streets, / no complaining from shed corners, / meadows shall not turn into groves, / fields shall not be overgrown by young pine³².

The russification policy made the historical memory of the once conflict-prone border with the eastern neighbour once again an issue.

The state, the homeland, the foreign land

National symbols in the Russian primer are represented by the portrait of the tsar Nikolai II and the image of epaulettes (shoulder marks) of a Russian

³¹ D.I. Tihomirov, E.N. Tihomirova, *Bukvar' dlâ sovместnogo obučeniâ pis'mu, russkomu i cerkovnoslavânskomu čteniu i ščetu*, 152nd edition, Moscow, s.n., 1907.

³² «Bring peace to the border» (verse 327 in Elias Lönnrot's *Kanteletar*).

officer. One will not find the word «Russia» in the book, and other countries are not mentioned either. The attribute 'Russian' is used as a characteristic of the land, its affiliation («Венянь муа» = Russian land), and as applied to the language («Speak Russian!», «Learn to speak Russian!» and so on).

The homeland in the Finnish primer is the related Finland and Karelia. There is a phrase in *The Birch and the Star* story by Topelius: «...the birch is a symbol of our homeland». Both the birch and the star appeared in allegorical sense. Birch in the parental home yard symbolized the people's bondage to the native land, roots of the family and the race, affection for the homeland. The star was a beacon for children to help them always return to the parental home from foreign land.

'Other countries' are mentioned in the Finnish primer both collectively («the elephant lives in southern countries», «the deer lives in northern countries»), and quite specifically (Lapland, Estonia, Russia). Russia is foreign land, and the negative attitude towards it is expressed in the poem *Väinämöinen's words*:

Said old Väinämöinen / to the young lad: / I'd sing for Finland to prosper, / for Karelia to be fine, / for people there to always live well, / for them to die in glory – / I'd lead the lazy ones to Lapland with my song, / send all other languid people off to Russia with my song.

Russia was the East that incited negative emotions, as seen from the sayings: «Winds of evil come from the East», «Easterlies are mean».

The authors included in the *Little Guidebook* the text of the song by Juhani Granlund «The Native Land» (*Kotomaamme*), which all people in Finland knew, and the «Karelian Song» by Pekka Hainikainen³³. Hainikainen's Fennomannian views showed vividly in this song, including its last stanza below:

When our Finland / Suffers cruel suppression, / Finland's grief / Reverberates in our poor Karelia, too. / And when the happy day / Dawns again over Finland, / The hymn of great joy / Shall echo in Karelia.

Adoration of the homeland's nature appears in fragments of classical poems many generations of schoolchildren are familiar with. Examples in the Russian primer are «white birch under my window...» and «the grass is green, the sun is shining...», in the Finnish primer – «a night in June was glowing through purple clouds...»³⁴.

³³ This song, written in 1899, soon turned into the anthem of Finnish Karelia.

³⁴ J.L. Runeberg's 'Svanen' ('The Swan'). Finland's renowned Swedish-speaking poet Johan Runeberg pointedly pictured Finland as modest, yet dignified.

The little homeland and its people

In the Finnish primer the little homeland is introduced through a picture of a specific Karelian village («Usmanala is a village in Karelia»). The illustrations, nearly all of them borrowed from Finnish study books, show a classic ‘Karelian-Finnish’ landscape, buildings, a typical fence. The texts transfer the understanding that the home nature is not just a repository of resources for living, the object of admiration, but also a source of inspiration. This message, together with the ‘ordinary man’s dignity’ theme appears in the poem *The verses I’ve learned*:

There’s no blacksmith better, / no ironsmith better, / than the one born in the coal burning pile, / matured on coal meadows. Never studied anywhere, / never been to great countries, / never wandered in Lapland woods, / never boated Estonian waters.
 Learned my own verses, / heard my own words, / picked them up from roads, / searched shrubs for them, / gathered them from willow growth, / harvested them from shoots, / took them when breaking heather, / when lying in a haystack.
 When I herded cattle as a child, / looked after the herd, / Lay in the woods, / in golden glades, / on motley rocks, / on sun-warmed boulders; / the wind brought a hundred words, / the air whispered a thousand, / verses flowed in waves, / songs splashed like water. / I rolled them up, / tied them up, / hoarded them on a balcony in the barn, / in a gold purse, / in an iron box, / on a brass balance scale.

Human images in the Finnish primer are few (the authors suggest that Karelians – ‘children of nature’ – should learn letters as linked to natural objects: animals, birds, fishes, etc.), but the dominant visual image is a peasant smoking a pipe and wearing a distinguishable Finnish beard and no moustache. A conspicuous cultural marker is that people have Finnish and Karelian names, and the name is a first step towards identity.

In the Russian primer the Karelian expression *Oma maa* = my land is used to denote the little homeland. The author often refers to the topic of the family, the home. Moreover, the home and the big family model is expanded to cover the relations between the tsar and his subjects («*The Tsar is our father*»), who are of symbolic kinship. The book offers a generalized, ‘universal’ concept of the countryside (e.g.: «There is a church in every village»). The rural landscape appears rather characterless in small illustrations. The dominant visual image is a peasant at work. The characters have Russian names only.

The city

In the Finnish primer rural life is idealized, the city is inferior to it in specific aspects that one can find in Runeberg’s poem ‘A boy from a log cabin’ (1886). The main hero is a lumberjack, who worked hard in the woods. He’d never, «not even for big money», trade his life for an urban life, because one won’t find

«such a great nature and friends» in the city. The primer has been intentionally made free of the pictures portraying items of ‘urban provenance’. The only exceptions are books in children’s hands and the oil lamp.

The range of items that remind of urban life, of factory production is wider in the Russian primer: in addition to the book and oil lamp, there is the hot air balloon, lantern, clock, eyeglasses, kettle, as well as the samovar – a symbol of both Russian and Karelian table tradition. The ‘urban prospects’ for a literate person are outlined in the poem: «A letter from his grandson / was delivered to Mitja, / His grandson is far away, / Living in the city...».

Child images and the system of precepts

Where the Russian primer has no pictures showing girls and boys together, the Finnish primer demonstrates a kind of ‘gender equality’: a boy and a girl walking together to school (the boy showing the way), another pair of children returning from forest carrying baskets full of berries.

The Russian primer pictures a flock of boys going to school. Illustrations of verbs used boy images only. There are no girls in illustrations, and even the sentence «A girl is sitting at the table» is accompanied by a picture of a young woman or a teacher reading a book. At the same time, the idea of educating village girls is expressed in the very first text of the primer: «Nastja returned from school. Mother was home. Nastja was reading a book, and the mother was glad».

Both primers professed Christian values: care for people around, diligence, modesty and honesty. The Finnish primer is also filled with cryptic moralizing. Behavioural norms and the «common sense» attached to them are rendered through numerous tales about animals. A whole section is devoted to proverbs, mainly Finnish ones, portraying the nation’s moral code: «Time won’t wait for a man», «Learning can’t be ditched», «Promising is a good thing, but giving is better», «A man’s word is his honour», etc.

The Russian primer also contains didactic tales and stories of everyday life, and tales about animals. For studying times of the day and days the pupils get a schedule of peasant daily routines, telling them what is traditionally done and, hence, should be done at certain times. In contrast to the Finnish primer, motivational sentences and edifying appeals to children are scattered around the pages of the Russian primer: «Learn your lessons, Misha», «Live in peace», «Revere the Tsar», «Fear God!», «Speak Russian», «Learn to speak Russian», «Learn to read and write, children», «Give to everyone who asks you», «Honor your father and your mother».

Valedictory instructions to pupils

Both primers are concluded by valedictory texts. The title of this text in the Russian primer is *The Church*:

The first thing we see when entering a village is a Lord's church... In the church were we baptized; to the church shall we be taken when we yield up the spirit into the hands of God...

The church is not like any other home. Some we'd avoid visiting, to others we aren't welcome. The Lord's church however is where everybody goes... Never forget about the Lord's temple. Go there both in sorrow and in joy, and pray to God with all pure faith.

The valediction chosen by the authors of the Finnish primer was the above-mentioned 'The Birch and the Star' story by Z. Topelius, which ends as follows:

Dear children. Persist in this world with God in your heart and the everlasting aim in front of you! Keep looking for the birch – the symbol of our homeland. May the homeland be the lifelong target of your efforts and your love! Keep looking for the star – the symbol of eternal life. May this light stay with you throughout your life!

Thus, the Russian primer appealed to go to church, the Lord's temple. The Finnish primer suggested working for the benefit of the homeland with God in the heart. The formulas of the Orthodox and the Protestant ethics were expressed in texts for children.

Some conclusions

The publication of the abecedary and primers for Karelian schoolchildren in the late 19th-early 20th centuries was either directly or indirectly related to Finland: competition for the minds and souls of Karelians incited the educational initiatives from the Grand Duchy on the one hand, and the response in Russia, on the other.

A comparison of two primers, one published in Finland and the other one in Russia, shows that each of the books was meant to shape the desired identity: either Finnish or Russian. The Finnish primer vividly brought out the national identity of a small nation that desperately resisted Russification and struggled to retain its original character. The primer emphasized the kinship of Karelian and Finnish. The imperial idea of 'Great Russia' was implicit in the Russian primer. It reproduced the model of a hierarchical family state headed by the father tsar. The Karelian language in the primer, which broadcasted Russian culture, played an auxiliary role, helping to learn the Russian language.

The patriotic ideas of the primers are placed against the background of the religious message, rendering the Orthodox tradition in one case and the

Protestant tradition in the other. The polar opposite understanding of the local highlights the difference in the sources of Russian and Finnish patriotism. In the Finnish primer the local (little homeland) bears unique, individual features, whereas its appearance in the Russian primer is universal or, rather, averaged and void of a distinct character.

Afterword: milestones in the history of the primer for Karelian schools in the 20th century

The Soviet period was noted for a change in the very paradigm of the national language policy and the desire to push forth the development of public education, in the periphery of the country, too. After Finland had become independent in 1917, Karelia found itself at the frontier between ideologically hostile domains. Russian government viewed this border region as the outpost for promoting communist ideas to Finland and Scandinavia. From 1920 to 1935 Karelia was governed by ‘Red Finns’ – political emigrants from Finland, and the so-called Finnish factor has played a dramatic role in determining the vector of the national language policy. Finnicization of Karelia, which became an autonomous unit within Soviet Russia, consisted, among other things, in making Finnish an official language (alongside Russian). Where in the early 1920s pupils in national (Karelian) schools could choose between Russian and Finnish as the language of instruction, in the academic year 1927/28 instruction in Karelian schools began to be massively transferred to Finnish, and by 1931 all elementary and seven-year schools had been Finnicized. Simultaneously, regional study books and learning aids were created, a majority of them published in Finnish.

Early in the 1930s the script was worked out for Tver Karelians (resided some 200 km NW of Moscow), and corresponding elementary school study books appeared. In the Karelian Autonomous Soviet Socialist Republic (KASSR) however the authorities decided that teaching in the Karelian language was inexpedient, especially given the difficulties of establishing its literary form as there existed three large dialectal groups³⁵.

Study books were constantly scrutinized by authorities, and criticized as to how well they suited the name of a ‘truly Bolshevik study book’. This was the time when the basic canon of study books for national schools was established. The Meeting of People’s Commissars of Education of autonomous republics and heads of District Boards of Education of regions in Moscow in April 1933 stipulated that the ‘regional national study book’ was to specify and expand

³⁵ A.I. Afanas’eva, *Kul’turnye preobrazovaniâ v sovetskoj Karelii. 1928-1940*, Petrozavodsk, Karelia, 1989, pp. 40-62.

the material contained in 'stable study books' (common for all regions of the country) on certain subjects in order to provide learners with knowledge about the national republics and regions³⁶. 'Stable' study books were as a rule written by educators from the national capital to be then translated into languages of the USSR nationalities. Elementary school textbooks and primers were produced by local authors, since junior schoolchildren need concrete and comprehensible materials, i.e. the textbook content should be linked to the child's everyday realities and to 'local specifics'³⁷.

By the mid-1930s nearly all categories of pupils studying the Finnish language were supplied with relevant study books. The relations with the western neighbour were however deteriorating, and the attitude toward the language of 'bourgeois Finland' changed abruptly on the eve of the war. The key policy in the second half of the 1930s was to drive the 'enemy' language out of Karelian schools. Neither did the political repressions that swept through the country spare Karelia. It was then that the authors of the Finnish language textbooks died: Viktor Salo (1938), and Matti Airola (1939). In 1938 the regime executed former leader of the Karelian government Edvard Gylling, the father of Maja Gylling, the author of the Finnish language primer and several textbooks. Most pre-war Finnish language textbooks were short-lived, with a tragic end. At every new turn of the language policy, which was tightly bound to ideology, previous textbooks were cast away and destroyed³⁸.

The KASSR constitution adopted in 1937 declared three languages to be official in the republic: Karelian, Russian, and Finnish, but in 1938 already the constitution was amended, terminating the official status of the Finnish language. In Karelian national schools the Finnish language was substituted with the 'common Karelian literary language', which local linguists headed by Professor D.V. Bubrih were actively elaborating. In 1936-1937 Karelian was instated as the language of instruction in junior schools of Soviet Karelia, and Russian was the language of instruction in the senior school³⁹.

In 1938-'39 a new change occurred in the language situation in Karelia. Professor Bubrih and his 'Karelian literary language' team were arrested under the allegation of 'bourgeois nationalism', and the task of creating the language

³⁶ Gosudarstvennyj arhiv Rossijskoj Federacii [Russian Federation National Archives]. Fond 296, Op. 1, delo 513. Rezolüciã sovešaniã narkomov prosvetešeniã avtonomnyh respublik i zaveduših RONO kraev i oblastej. 12-15 aprilã 1933 g.

³⁷ For information about the content of study books written in Finnish in the 1920s-1930s see: O. Ilyukha, Y. Šikalov, «S čego načinaetsã Rodina...». *Reprezentaciã «maloj» i «bol'šoj» rodiny na stranicaħ učebnikov fïnskogo äzyka dlã načal'nyh škol sovetskoj Karelii 1920-40-h godov*, in P. Suutari, Y. Šikalov (edd.), *Karelia Written and Sung. Representations of Locality in Soviet and Russian Contexts*, Helsinki, Kikumora Publications Aleksanteri Series, 3, 2010, pp. 177-208.

³⁸ P. Kruhse, A. Uitto, *Suomea rajan takana 1918-1944: Suomenkielisen neuvostokirjallisuuden historia ja bibliografia*, Helsinki, BTJ Finland Oy, 2008, p. 296.

³⁹ N.A. Korablev, V.G. Makurova, Y.A. Savvateev (edd.), *Istoriã Karelii s drevnejših vremen do naših dnei*, Petrozavodsk, Periodika, 2001, p. 502.

was taken up by a group of linguists led by Livvi Karelian N.A. Anisimov. Their target was a common language for the Karelian ASSR, disregarding the language of Tver Karelians. The language was ‘cleaned’ of Finnish elements; they tried to bring it as close as possible to Russian, using Cyrillic characters as the basis⁴⁰. Thus primers written in the ‘Karelian literary language’ appeared in Karelian schools in 1937-1939.

The language policy of Karelia was again reoriented by the Soviet-Finnish (Winter) war of 1939-1940. The Soviet Union annexed some Finnish territories, and the Finnish language was again in demand. Study books in the ‘Karelian literary language’ were no longer published. In the Karelian-Finnish SSR Constitution adopted on July 9, 1940 Finnish was announced the second after Russian official language of the new union republic. Soviet leaders believed teaching of the Finnish language in schools would promote integration of Finns into the Soviet «family of brotherly nations»⁴¹. Because of the changes in the language policy there was again a need to create primers and textbooks, and their translations from the original Russian versions. New books were produced very quickly: in 1940-1941 several dozens of study books were published for elementary school alone.

In 1941-1944, when a part of Karelia was under occupation, Soviet printing houses managed to publish only several textbooks, but not a single primer. At the same time, a primer by Aarni Penttilä was published for schools established by Finnish occupational authorities to teach Karelian children⁴². The primer transmitted the idea of establishing ‘Great Finland’ by uniting all Finno-Ugric nations under the common flag of Suomi.

In the first post-war years the Finnish language was again supported, since the new union republic – Karelian-Finnish SSR – was founded. On the other hand, a crisis was brewing up in the republic’s educational system. The number of pupils at national schools was very low, the number of such schools was declining, and the graduates’ level of knowledge was so poor they could hardly continue education. In 1954 the Karelian government had to pass an ordinance to adopt the Russian language for teaching all subjects in ‘non-Russian’ schools of the republic. As the Karelian-Finnish SSR was transformed into the Karelian Autonomous Soviet Socialist Republic in 1956, Finnish lost the official

⁴⁰ A.E. Belikova, *Finskij âzyk v Karelii v 20-30-e gody XX veka: popytki âzykovogo modelirovaniâ*, in O. Ilyukha (ed.), *Finskij faktor v istorii i kul'ture Karelii XX veka*, Petrozavodsk, IÄLI KarNTs RAN, 2009, pp. 170-171; E. Anttikoski, *Strategii karel'skogo âzykovogo planirovaniâ v 1920-e-1930-e gg.*, in T. Vihavainen, I. Takala (edd.), *V sem'e edinoj: Nacional'naâ politika partii bol'shevikov i eje osušestvlenie na Severo-Zapade Rossii v 1920-1950-e gody*, Petrozavodsk, PetrGU, 1998, pp. 214-217.

⁴¹ P. Kruhse, A. Uitto, *Suomea rajan takana 1918-1944: Suomenkielisen neuvostokirjallisuuden historia ja bibliografia*, Helsinki, BTJ Finland Oy, 2008, pp. 64-65.

⁴² A. Penttilä, *Karjalan lasten aapinen*, Keuruu, Otava, 1942.

language status. In the autumn of 1958 learning of this language stopped being compulsory for children of Finns and Karelians.

The Finnish language returned to the school curriculum only in the second half of the 1960s, now as one of foreign languages⁴³. Soviet ideologists of the time were obsessed with the idea of ‘wiping off ethnic distinctions’, and Russian once again became a means of cultural assimilation. Karelian schoolchildren started learning it using primers published in Moscow.

A new phase in the publication of Karelian language study books commenced in connection with ‘perestroika and glasnost’ in the second half of the 1980s, when the need to revive the Karelian and the Vepsian languages was voiced out loud. Linguists from the Institute of Language, Literature and History of the Karelian Branch of the USSR Academy of Sciences L.F. Markianova and P.M. Zajkov prepared Karelian primers based on Latin characters and relying on the tradition used in closely related Balto-Finnic languages⁴⁴. These continuing efforts are supported by the neighbouring Finland, and backed up by scientific research in grammar and development of literary vocabulary, including the one needed in school studies.

Thus, the position of Karelia at the border has turned it into an intersection of interests of Russia and Finland, into an area where cultures are not just demarcated, but also come in contact and sometimes interact. In the 20th century the force fields of the Finnish and the Russian ‘factors’ were the background that largely shaped many cultural processes, including the fate of the school primer.

⁴³ L.I. Vavulinskaâ, *Problemy nacional’noj školy v Karelii vo vtoroj polovine 1940-1960-h godov*, in P.M. Zajkov, T.I. Staršova (edd.), *Bubrihovskie čtenîâ: problemy pribaltijsko-finskoj filologii* Petrozavodsk, PetrGU, 2002, pp. 271-277; N.A. Korablev, V.G. Makurova, Y.A. Savvateev (edd.), *Istoriâ Karelii s drevnejših vremen do naših dnei*, Petrozavodsk, Periodika, 2001, p. 739.

⁴⁴ L. Markianova, Z. Dubrovina, *Aberi: karjalan kielel liuglazii lapsii nah*, Petroskoi, Karjala, 1990; P. Zaikov, *Vienan aapini*, Petroskoi, Karjala, 1992.

Learning to read and write in Italy in the second half of the nineteenth century. Primers and reading exercise booklets: publications, ministerial control and teaching (1861-1898)

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ABSTRACT: This paper wants to give an account of the first results of an ongoing investigation that has had as its specific object of study the production and the circulation of primers and reading exercise booklets which belong to one of the less analyzed sectors in the production of books for the Italian school system. The first part examines the lists of primers and reading exercise books published during the first fifteen years of the Italian State. The counting of different database (manes, res-educationis), paper and electronic directories and catalogs, was integrated from the archival sources. Firstly from the list collected by the provincial school boards and school inspectors in the course of investigations initiated by the Ministry of Education in 1869 and during the period between 1875 and 1881; these lists, which are now preserved in the central State Archives, were sent by the prefects and the supervisors to the Superior Council of the Ministry of Education to assess the suitability of textbooks and their use in classrooms. Secondly, the paper examines the evolution of editorial production recorded over the next twenty years, drawing on both lists of textbooks collected to be submitted to the Commission chaired by G.A. Barrili, in the years 1881-83, and those published by the Commission chaired by Giuseppe Chiarini and Pietro Cavazza between 1894 and 1898. Finally, the paper discusses some aspects of the linguistic content, but above the educational ones transmitted through primers and exercise booklets for supporting the development of civil and ethical dimension and the promotion of national identity in Italian primary schools.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Primary education; Italy; XIX Century.

1. *Introduction to methodology*

Textbooks are an extremely valuable source for reconstructing the complex learning and cultural processes that defined the Italian peninsula during the nineteenth and twentieth centuries¹. Although school manuals have been under investigation for a couple of decades in some national contexts such as the Italian one, they still constitute a very interesting field of study and analysis². This paper wants to give an account of the first results of an ongoing investigation that has had as its specific object of study the production and the circulation of primers and reading exercise booklets which belong to one of the less analyzed sectors in the production of books for the Italian school system.

The sources which have been examined are from different origins. In the first place what has been examined are the lists of primers and reading exercise books collected by the provincial school boards and school inspectors in the course of investigations initiated by the Ministry of Education in 1869 and during the period between 1875 and 1881; these lists, which are now preserved in the central State Archives, were sent by the prefects and the supervisors to the Superior Council of the Ministry of Education to assess the suitability of textbooks and their use in classrooms. Secondly, to these lists were then added the ones produced and brought to the attention of the Commission chaired by Barrili in the years 1881-83. Lastly, primers and reading exercise booklets published in the Ministry of Education Bulletin were examined as a result of the work carried out by the Commission chaired by Giuseppe Chiarini and Pietro Cavazza between 1894 and 1898. Moreover, the archival sources have been integrated with information gathered from different databases, which are uniquely historical and scholastic (reseducationis.it; [manes](http://manes.it)) and from both paper and electronic directories and catalogs.

In many cases, the texts used daily and by pupils for a long period of time have not been preserved or are only available for consultation in some libraries or specialized centers. Furthermore, different editions produced over the decades are not always recoverable. Moreover, it is not simple to retrieve information regarding the authors of the textbooks.

¹ This is described in the recent observations of A. Ascenzi, *La ricerca sulla manualistica scolastica in Italia: nuovi orientamenti storiografici e prospettive per il futuro*, in J. Meda, A.M. Badanelli (edd.), *La historia de la cultura escolar en Italia y en Espana: balance y perspectivas*, Macerata, eum, 2013, pp. 119-138.

² It is not possible, here, to give an exhaustive panorama of the many studies that have appeared in recent years which have led to a deeper understanding of the laws and regulations, of the publishing specifically targeted to schools, of subject manuals used in primary and secondary schools, of the catalogs and collections of books, of the tools such as directories or databases of manuals and textbooks. For a first overview, consult M. Galfrè, *L'editoria scolastica dell'Italia unita nella storiografia: bibliografia*, «La Fabbrica del libro: bollettino di storia dell'editoria in Italia», n. 2, 2001, pp. 43-57; E. Marazzi, *L'editoria scolastico-educativa e la ricerca storica. Il caso italiano*, «Società e Storia», n. 138, 2012, pp. 823-851.

2. *The production and the circulation of primers in the years of the historical right (1861-1876)*

The common thread is represented by the educational policy of the new Italian state. What has been documented in other studies is that learning how to read and write is for the new Italian national state one of the most important cultural axes that will form the basis of future Italian citizens. The programs launched by the Ministers of Education, between 1860 and 1867, established for the lower sections of the first grade the usage of graduated exercises of syllabication, the explanation of the words in the readings, the formation of syllables, of letters and of words by imitation and the writing of words dictated through simple syllables. Even for the upper sections of the first grade, textbooks were provided with «graduated exercises of syllabication and reading; explanations of words and clauses in the readings; imitation writing exercises; graduated dictation exercises; practical spelling rules».

However, the most significant indications were the ones supplied in the guidelines, where the minister explained how teaching in primary school «should aim at educating, and provide with time to the needs of life». For these reasons, even the most simple perception should provide the schoolmaster with topics to «declare and reconfirm some great moral precept, to provide some useful information about hygiene, or appropriate rules for civil living, in order to install in pupils the feeling of duty, the love for the homeland, the urbanity of behaviour in a natural way in order to avoid a well structured and designed lesson»³.

For the programs that were launched six years later, minister Coppino after pointing out that «education should always be combined with good breeding», considered useful to remind that what should be given when teaching was «useful knowledge of the physical world and of morality which would train the pupils' mind, educate their intellect, and by looking at the wonders of nature raise their minds to the knowledge of the Creator, and also instill in the youngsters' hearts the love for every beautiful virtue».

Coppino's attention focused on the aspects of correct pronunciation and spelling since children's language was influenced by the widespread use of dialect and, after stating that it was not the task of elementary schools to «bring up calligraphers», he underlined the «paramount importance» of language learning. For this purpose, he emphasized the importance of doing syllabification, reading, and correct pronunciation exercises; as well as imitation writing and

³ R.D. 15 settembre 1860 Programmi delle scuole elementari annesse al Regolamento 15 settembre 1860 e C.M. 26 novembre 1860-Istruzione ai maestri delle Scuole primarie sul modo di svolgere i Programmi approvati col Regio Decreto 15 settembre 1860, in *Codice dell'istruzione secondaria classica e tecnica e della primaria e normale*, Torino 1861, pp. 373, 401 and 415.

dictation exercises, for the correct spelling and relating to the nomenclature in first grade⁴.

In order to ensure a more effective action, the Italian school system pointed to uniformity in terms of teaching and, in this direction, a key role was given to textbooks. From the years immediately following the birth of the nation state, the Ministers of Education endeavored to implement a wider use of manuals and appropriate textbooks in Italian schools. For this purpose different bodies were established and they were assigned the role to check and revise textbooks. The Italian Ministry of Education, in fact, wanted from the first months right after the birth of the nation state to ensure a solid control in the production and circulation of books, which were still seriously insufficient, in order to be introduced into schools and thus fight the high rates of illiteracy. Periodically, the texts were revised by bodies set up at the provincial or central level. Between 1861 and 1897, in fact, textbooks passed the first screening of a central body, the Consiglio Superiore di Pubblica Istruzione (Superior Council of Public Education). After the school administration reform, the Minister Michele Coppino, wanted to entrust decentralized administrative bodies, namely the provincial school boards, with the task of drawing up lists of textbooks to be authorized for use in classrooms. This brought to a dual evaluation channel because the Superior Council of Public Education did not lose its prerogatives. It was at the turn of the late 1860s and early 1870s that the Council collected the lists prepared by the provincial school boards⁵. Within this evolution is also placed the review regarding the production of reading primers which were subject to a preliminary identification that would have been further investigated after 1883, and finally, in the three years between 1894 and 1897.

Afterwards, only in 1875, the issue regarding textbooks was back to the center of attention of political education. The minister Ruggero Bonghi, in fact, assigned the task to examine the 446 texts that were in use in the peninsula to the Superior Council of Public Education. Among these texts, 49 were primers and reading exercise booklets, which were examined by the committee who were supported by external experts⁶.

⁴ Istruzioni e programmi per l'insegnamento della lingua italiana e dell'aritmetica nelle scuole elementari approvati con R.D. 10 ottobre 1867, n. 1942, in *Nuovo Codice della istruzione pubblica* [da ora in poi *Codice*], Saluzzo, Tipografia Fratelli Lobetti Bodoni, 1870, pp. 702-711.

⁵ For these aspects refer to A. Barausse, *La biblioteca dello scolaro italiano. La questione dei libri di testo e della manualistica scolastica dall'Unità all'avvento del fascismo*, in Idem (edd.), *Il libro per la scuola dall'Unità al fascismo. La normativa sui libri di testo dalla legge Casati alla riforma Gentile (1861-1922)*, Macerata, Alfabetica, 2008, pp. 11-36.

⁶ The experts who were nominated were Pietro Dazzi and Filippina Gaio that conducted the analysis of the texts in 1875, Archivio Centrale dello Stato (Central State Archive) [from now on ACS], Ministero Pubblica Istruzione (Ministry of Education) [from now on MPI], F. CSPI, I Serie 1849-1903, Atti posteriormente versati, b. 5, f. 6.

2.1. *The production of primers and reading exercise booklets in the typographical and editorial world*

During the first fifteen years of the unified state, circulation means used for the dissemination of textbooks and, within the manuals, of primers were different. A significant role, that deserves to be investigated in more detail, was played by educational conferences organized annually by the Associazione Pedagogica Italiana (Italian Society of Pedagogy) chaired by Giuseppe Sacchi⁷, along with magisterial and educational conferences. Prizes awarded for the best didactic works actually placed textbooks among the most valuable ones. Besides the annual meetings of the scholars of pedagogy and didactics, attention must also be placed on the role that publishers, who were often the owners of journals for teachers, had because they advertised and reviewed materials for schools in their journals. The educational and cultural processes are, moreover, highly influenced by the development of the printing and publishing industry. Research carried out in the last decades, conducted by Italian scholars who have cultivated this new field of study, have brought to light the complex articulation of school publishing, that in the aftermath of national unity, projected to extend the capacity of production and distribution of textbooks. Moreover, school manuals represent a modernizing teaching development in the processes of schooling⁸.

What can be noticed in regards to the production of primers and reading exercise booklets is a significant evolution. During the period between 1861 and 1875, in fact, one hundred and fifty-two primers were recorded. By analyzing more specifically the period of the historical right, what can be observed is that there were fifty-six primers in use during the first decade. In five cases, there were also new editions of texts published during the first five years. In the following five years there was a significant increase in the production of primers and reading exercise booklets with ninety-five new ones. This first peak in numbers was accompanied and facilitated by the early development of a more articulated presence of the printmakers and publishers. Out of all the new primers that appeared in the years between 1871 and 1875, a good number, thirty-three to be precise, were produced by printing and publishing companies in Turin.

In particular, in addition to more solid publishing companies, such as «G.B. Paravia», that could distribute a great number of titles, twenty-six, and

⁷ An organic study on the events of the Italian Society of Pedagogy is still missing. For an introduction, see S. Bucci, *Associazioni pedagogiche Nazionali*, in M. Laeng (ed.), *Enciclopedia Pedagogica*, Brescia, La Scuola, 1989, pp. 1127-1135.

⁸ Regarding the development of educational and scholastic publishing, refer to the two collections G. Chiosso (ed.), *TESEO. Tipografi ed editori scolastico-educativi dell'Ottocento*, Milano, Editrice Bibliografica, 2003; Id., *TESEO '900. Editori scolastico-educativi del primo Novecento*, Milano, Editrice Bibliografica, 2008.

«Vaccarino», that printed four, there were smaller printing companies, but still productive such as «Tipografia Scolastica» of Sebastiano Franco, Binelli and C., Petrini, Pietro Cerruti, Civelli, Carlo Favale, Carlo Pozzi, Giuseppe Tarizzo. The only Piedmontese and not Turinese publishing company which resulted being present was the «Tipografia Devecchi e Vinassa di Asti». The Piedmontese capital, therefore, retained a role of almost absolute monopoly in this particular regional area; unlike what happened in other regions, with the exception of Liguria, where the unique and rather limited production of primers, was established in Genoa with two titles produced by «Tipografia dei Sordomuti» and one title by «Tipografia della Gioventù». The production of primers and reading exercise booklets in the area of Lombardy, in fact, operating in a certain weak context, in addition to being represented with a title of the typographer Lamperti, that was added to those already produced in the first years after the unification by «Tipografia scolastica Pagnoni», by «Tipografia Redaelli» and by the typographer Golio; between 1871 and 1875 it managed to express a certain interest towards the school publishing market with five other titles published by: the editor F. Volontè in Saronno, «Tipografia Brughera ed Ardizzi» in Sondrio, «Tipografia Mondovi» in Mantua, «Tipografia Cairo» in Codogno, «Tipografia Fratelli Bertola»; while the remaining other four titles were published by the well known «Tipografia Paravia». In this phase, printing offices and publishing companies had little interest in the production of primers in the area of Triveneto, as a matter of fact overall, in five years only six titles were issued by printing companies, although they were printed by four different companies: «Tipografie Veneziane G. Favai and Tondelli», «Tipografie F. Apollonio» in Verona, «Tipografia Reale Burato» in Vicenza and the publisher Gaetano Longo in Treviso. In the area of Emilia Romagna the offer of school manuals for the teaching of reading and writing was even weaker, as a matter of fact only two titles were produced, and they were printed by «Stabilimento Tipografico Monti» and by «Tipografia Fratelli Bertola» in Piacenza.

In central Italy the printing of primers and reading exercise booklets was guaranteed by the Florentine printmakers in Tuscany with five titles published by Felice Paggi, four by Casale, two by «Società Editrice», one by «Cooperativa Editrice» and one by the «Tipografia Claudiana». Other four titles were added to these, and they were printed by the following: a typographer in Pisa; the typographer T. A. Moschini in Siena; Massimo Ristori, a typographer in S. Miniato; and B. Canovetti in Lucca, who accepted the request of a local schoolteacher of Viareggio. Even in the Marche area only small local printers were present such as G. Cherubini in Ancona, Bacher Gentile in Fermo and Floro Flori in Iesi that printed six new titles in total. The typographical and editorial reality of the capital, however, gave even greater signs of difficulty in entering the market of school manuals dealing with reading and writing, not being able to express itself if not with only one title by the publisher «Fratelli Pallotta» and other five by the Roman branch of the publishing company Paravia.

Rather limited was the support to the development of the production of primers recorded in southern Italy in the period between 1871-1875. In this context, in fact, the production of twenty new titles were identified through the research that was carried out; seven of these titles were produced in a special way by printing houses in Palermo, three by Neapolitan printing and publishing companies, two from a printing company in Avellino, one by a typographer in Salerno; and finally four from printing companies in Cagliari.

During the first forty years of post-unification what can be found is an interesting evolution of the authors of primers, also in relation to the development of the methods. For more detailed knowledge of the diffusion of reading primers during the first fifteen years after the unification, two are the significant sources, although not exhaustive, to take into account. Through the reports submitted by the provincial school boards in 1869 to the Superior Council of Public Education, and those sent by the inspectors between 1874 and 1875, it is possible to grasp, at the very least, the representation that the central organs had of textbooks supplied to schools.

The most innovative primers from a methodological point of view, aimed at facilitating the simultaneous acquisition of both reading and writing skills. The creation of reading primers produced in the decades after the birth of the nation state, are a reminder in many respects of those already published towards the end of the eighteenth century⁹, when, aided by the application of educational reforms in various states prior to unification, what was recorded was the spread of a new type of primer, as an evolution of the primers «Santacroce». In Lombardy, during the period under Austrian domination, the book by Francesco Soave¹⁰ circulated widely; it was based on the phonic-syllabic method, and was accompanied by aphorisms and moral fables of classical derivation. A recent study has revealed that the text had been introduced in many schools in the first half of the nineteenth century, not only in the Lombard area but also in the Papal States¹¹. Nevertheless, during the nineteenth century, in many towns of the Italian peninsula, reading and writing were taught through the adaptations of the phonic method of normal words or through J. Jacotot's analytic-synthetic

⁹ E. De Roberto, *Scuola o scola? Monolinguisimo, poliformia e variazione nei sillabari postunitari*, «La lingua italiana. Storia, strutture, testi», vol. VI, 2011, pp. 161-174.

¹⁰ C. Pancera, *L'importanza dei testi scolastici di Francesco Soave*, in L. Bellatalla, *Maestri, Didattica e dirigenza nell'Italia dell'Ottocento*, Ferrara, Tecnomproject, 2000, pp. 43-53; S. Morgana, *Modelli di italiano nei testi di lettura scolastici e per l'infanzia. Dall'età delle Riforme alla Restaurazione*, in Eadem, *Capitoli di storia linguistica italiana*, Milano, Led, 1995, pp. 271-302.

¹¹ S. Dainotto, *I libri di testo: autori, editori e tipografi (sec. XVI-XIX)*, in C. Covato, M. I. Venzo (edd.), *Scuola e itinerari formativi dallo Stato Pontificio a Roma capitale. L'istruzione primaria*, Milano, Edizioni Unicopli, 2007, pp. 91-119. Instead there is limited knowledge of the methods adopted for the teaching of reading and writing in southern Italy. For a first overview of books circulated M. Viola, *I libri di testo e la Pubblica Istruzione dal 1806 al 1825 nel Regno di Napoli*, in *Atti dell'Accademia di Scienze morali e politiche*, Vol. CIX, 1998, Napoli, Gianni Editore, 1999, pp. 87-106.

method, however, developed by using religious types of texts. Jacotot had linked the teaching of various subjects with Fenelon's book *Telemaco*, which also represented the primer and pupils' first reading book. Nevertheless, the method did not spread easily because of the defect of graduation and the complexity of the contents of the volume. The idea was applied with greater practical sense by other schoolmasters who applied the method through the introduction of a short story, of a sentence, of a word. Generally, reading primers included a series of propositions, often expressed through prayers or religious topics (for example the Sunday prayer, or the *Our Father* prayer) to engage children. In Italy, a refinement of the phonic method brought first Lambruschini to introduce the method of normal words, and then Luigi Muzzi, Domenico Antonio Farini, the canon Figlinesi of Empoli, Francesco Gazzetti, Vincenzo De Castro and others to dictate their lessons in reading and writing simultaneously¹². Reading primers were basically structured in two parts. The first part usually started with the discussion of vowels and semi-consonants, to then move on to the illustration of diphthongs and hiatuses; consonants and direct and inverse syllables were then presented. The way in which the consonants were presented was characterized by a great variability. Almost always, then, from the first pages a list of demonstration words was given. In the second part what was found was a section of short narrative texts, with very simple sentences, poems,

¹² For information on the different methods and teaching practice of reading and writing see the following entries: "Abecedaire", "Ecriture", "Ecriture-lecture", in *Dictionnaire de pedagogie et d'instruction primaire publiè sous la direction de F. Buisson*, I partie, Tom premier, Paris, Librairie Hachette et C., 1882, pp. 2-3, pp. 798-801, pp. 801-803; the entry "Lecture", in *Dictionnaire de pedagogie et d'instruction primaire publiè sous la direction de F. Buisson*, I parte, tome second, Paris, Librairie Hachette et C., 1882, pp. 1534-1551; S. Raccuglia, *L'insegnamento della lettura. Storia critica dei metodi usati per insegnare a leggere*, Palermo, Sandron, 1893; the entry "Metodi per insegnare a leggere", in A. Martinazzoli, L. Credaro (edd.), *Dizionario illustrato di Pedagogia*, Vol. II, G -M, pp. 667-675 e pp. 448-456. Also consult the following entries: "Sillabario", in A. Martinazzoli, L. Credaro (edd.), *Dizionario illustrato di Pedagogia*, Vol. III, N-Z, Milano, Vallardi, 1910, pp. 525-527 e 527-530 edited respectively by Quintilio Tonini and Pasquale Fornari; G. Lombardo Radice, *Lezioni di didattica e ricordi di esperienza magistrale*, Firenze, Sandron, 1951, pp. 270-271; F. De Vivo, *Intorno all'insegnamento del leggere e dello scrivere*, «Rassegna di Pedagogia», vol. XXIII, 1965, pp. 28-43; P. Lucchi, *La Santacroce, il Salterio e il Babuino. Libri per imparare a leggere nel primo secolo della stampa*, «Quaderni Storici», n. 38, 1978, pp. 593-639; D. Gasparini, *Da Ichelsamer a Comenio. Il metodo fonico e il primo abecedario illustrato*, Roma, Armando, 1984; P. Lucchi, *La prima istruzione. Idee, metodi, libri*, in G. Brizzi (ed.), *Il catechismo e la grammatica. I. Istituzioni e controllo sociale nell'area emiliano romagnola nel Settecento*, Bologna, il Mulino, 1985, pp. 25-81; G. Genovesi, *Leggere e scrivere, che fatica! Apprendimento della lettura e della scrittura nei primi quaranta anni unitari*, in *La scrittura*, «Fare scuola», n. 6, 1987, pp. 51-70; A. Zoi, *Lettura e scrittura. Metodi per l'insegnamento della [lettura e scrittura]*, in M. Laeng (ed.), *Enciclopedia pedagogica*, Brescia, La Scuola, 1990, Vol. IV, pp. 6742-6776; M. Roggero, *L'alfabeto conquistato. Apprendere e insegnare nell'Italia tra Sette e Ottocento*, Bologna, il Mulino, 2000; M. D'Ascenzo, *Un manuale per i maestri: le Istruzioni di Maurizio Serra*, in R. Sani, A. Tedde (edd.), *Maestri e istruzione popolare in Italia tra Otto e Novecento. Interpretazioni, prospettive di ricerca, esperienze in Sardegna*, Milano, Vita e Pensiero, 2003, pp. 287-329.

designed to allow the pupil to exercise and to encourage the development of the pupil's lexicon, and moral tales. This section, was initially incorporated within the same booklet, but soon became a distinct product, on its own but associated with the first; the purpose of which was not only to facilitate the acquisition of reading skills, but also to instill values, norms and educational models of civil and social discipline¹³.

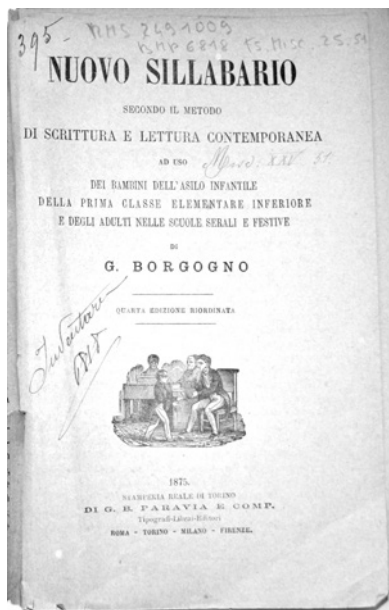
The new method went progressively establishing itself. Until the 1870s, reading primers and reading exercise booklets of authors linked to the liberal Catholic culture continued to predominate. The most popular authors were Giuseppe Borgogno, Raffaele Lambruschini, who has already been mentioned, Giovanni Castrogiovanni, Domenico Carbonati, Cipriano Mottura and Giovanni Parato, Giovanni Scavia, Pietro Thouar, Vincenzo Troya¹⁴, Giuseppe Vago, Luigi Stocchi. These men were also officials of Public Education. In particular, some of the writers of reading primers were special delegates, in some cases even school board officials or minor inspectors, school directors: for example, Domenico Carbonati and Luigi Stocchi, the latter before becoming inspector in 1864, was director of the «scuola normale» (The Normal School) of San Severo in the province of Foggia¹⁵. Their role and their function exerted a particularly significant importance in the dissemination of textbooks, but also generated some controversy especially from those who saw a clear conflict of interest. Others, such as Vago, Giuseppe Borgogno, or Giovanni Parato were figures of professors, who were able to use their role either as textbook authors or journalists or editors of journals such as «L'Osservatore scolastico» (The School Observer), that was actually published with the intention to help schoolmasters and schoolmistresses to make better use of multiple textbooks written by the Piedmont teacher in collaboration with Giovanni Scarpa; or «La guida del maestro elementare italiano» (The guide of the Italian elementary schoolmaster) by the Parato Brothers and Mottura, or «L'Amico delle scuole popolari» (The friend of community schools) which was founded in Naples by Mauro Valente and Giuseppe Vago with the idea of supporting the development of schoolteachers' culture¹⁶.

¹³ P. Del Negro, *La retorica degli abbecedari*, in M.A. Cortelazo (ed.), *Retorica e classi sociali. Atti del IX Convegno interuniversitario di studi*, Padova, Centro Stampa di Palazzo Maldura, pp. 137-145.

¹⁴ On the figures of Giovanni Scavia and Pietro Thouar see M.C. Morandini, *Scuola e nazione. Maestri e istruzione popolare nella costruzione dello Stato unitario (1848-1861)*, Milano, Vita e Pensiero, 2003, *passim*; Id., *I testi di lingua italiana prima e dopo l'unità*, in G. Chiosso (ed.), *TESEO. Tipografi ed editori scolastico-educativi dell'Ottocento*, Milano, Editrice Bibliografica, 2003, p. LI. See also the data files *ad vocem* in *Dizionario Biografico dell'Educazione (1800-2000)* [from now on DBE], Milano, Editrice Bibliografica, 2013 for the profiles of Giovanni Castrogiovanni, Giovanni Parato, Cipriano Mottura, Vincenzo Troya, Giovanni Castrogiovanni.

¹⁵ ACS, MPI, Personale 1860-1880, b. 2033; *Stocchi Luigi*; for information on the inspector from Calabria, also see the profile in DBE, *ad vocem*.

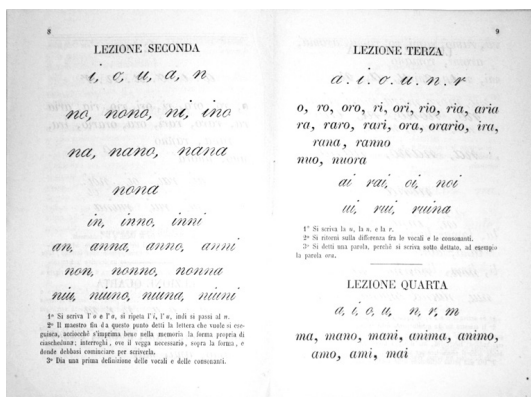
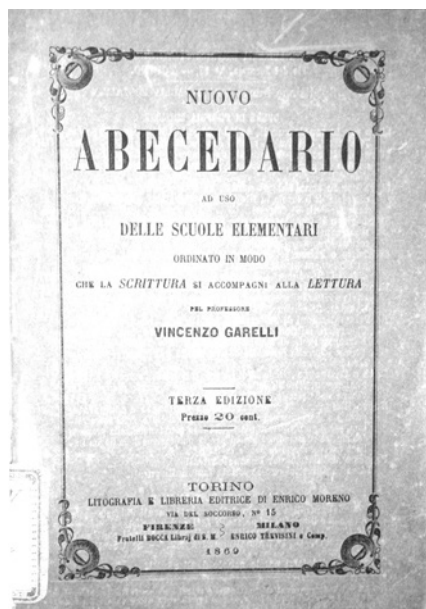
¹⁶ On the figures of Borgogno and Vago see the profiles *ad vocem* in DBE. For information



Pic. 1. *Nuovo sillabario secondo il metodo di scrittura e lettura contemporanea ad uso dei bambini dell'Asilo infantile, della prima Classe Elementare inferiore e degli adulti nelle Scuole Serali e Festive* di G. Borgogno, Torino, G.B. Paravia, 1875 (courtesy Library of Philosophy of the University of Rome "La Sapienza").



Pic. 2. *Giovanni Castrogiovanni, Sillabario secondo il programma per la prima classe elementare inferiore e compimento del sillabario per la classe superiore*, Torino, Libreria Editrice G. B. Petrini, 1873 (courtesy Library of Philosophy of the University of Rome "La Sapienza").



Pics. 3 a-b. *Vincenzo Garelli, Nuovo abecedario ad uso delle scuole elementari ordinato in modo che la scrittura si accompagni alla lettura*, Torino, Ed. Enrico Moreno, 1869 (courtesy Library of Philosophy of the University of Rome "La Sapienza").

The primer written by Vincenzo Garelli was the expression of a new trend in basic teaching, which intended to associate writing to reading; and according to whom, teachers had confused the training of the calligrapher, the art of beautiful writing with the one used for writing and reading: «beautiful writing will be expected later on, for now it is important to think about writing in a simple and clear way»¹⁷. The acquisition process of writing under dictation would enhance the learning of other skills. Primers like the one offered by Garelli presented a certain methodological focus and included practical advice: the use of the blackboard, the focus on the senses of sight and hearing, the shortness of exercises and the alternating of reading and writing, the way to hold a pen, the division of the working plan in lessons, mnemonic exercises of propositions written on the blackboard.

2.2. *The circulation of primers in schools according to school boards and inspectors*

The effective dissemination of primers for this group of authors was not, however, homogeneous. For a more detailed verification it is useful to analyze the identification that provincial school boards carried out in 1869 and whose documentation is kept in the Central Archives of the State. From the reports sent to the Minister by the prefects, who were responsible for the local school systems, what emerges is that there was a differentiated picture regarding the circulation of primers; moreover, only partial knowledge of the publications produced in the course of that decade appears to be evident. The total number of primers and reading exercise booklets examined by provincial school boards, in fact, were twenty-five written by authors against actually the forty-eight who, according to research, had produced primers and reading exercise booklets in that period. In the northern provinces of the country, generally, the names of the authors most frequently mentioned in the reports sent to the Ministry of Education were Giovanni Scavia and Vincenzo Troya, authors of the primers and reading exercise booklets¹⁸ widely distributed in the schools of the provinces of Genoa, Porto Maurizio, Alessandria, Cuneo and Turin, in the Lombardy

on the two periodicals of Torino, see G. Chiosso, *I giornali scolastici torinesi dopo l'Unità*, in Id. (ed.), *Scuola e stampa nell'Italia liberale*, Brescia, La Scuola, 1993, pp. 13-15.

¹⁷ V. Garelli, *Nuovo abecedario ad uso delle scuole elementari ordinato in modo che la scrittura si accompagni alla lettura*, Torino, Ed. Enrico Moreno, 3^a ed., 1869.

¹⁸ Probably the school boards were referring to G. Scavia, *Sillabario*, Paravia or *Piccolo Sillabario con figure ad uso degli asili infantili, della 1a classe elementare inferiore e delle scuole rurali maschili e femminili*, published in Torino, by the editor Grato Scioldo, 1876; or even the *Sillabario per i bambini della prima classe elementare: sezione inferiore*, Torino, Vaccarino, 1867; and a *Il nuovo Sillabario graduato di Vincenzo Troya*, Parte I, Genova, Tipografia del R. I. de' sordo-muti, 1869, 29^a ed.

provinces namely Mantua, Como and Pavia; and in the Venetian ones: Padua, Belluno, Ferrara, Venice and Udine; or in Modena, city in Emilia Romagna. The only texts that seem to strongly compete with these are the ones written by Giovanni Castrogiovanni published by the «Tipografia Favale»¹⁹ in Turin and by Vincenzo Garelli printed by the «Tipografia dei Sordo-Muti»²⁰. In schools, other readers were found more occasionally, like the one written by Giovanni Lanza printed by Paravia and adopted in the schools in Alessandria. During the first decade of the post-unification period, primers and reading exercise booklets were the first type of school manuals to be produced locally. In this sense, the reports of the northern provincial school boards, indicated some authors who had written texts, which unfortunately were not found, like the one of a certain G. Sander, who thanks to a printing company in Cesena, issued one of the most widely diffused primers in local schools; or the ones written by Ernesto Pizzigati, published by a smaller printing company, «Tipografia Di Giuseppe», in Turin and a primer by G.B. Rossini in use in the schools of Brescia and published by a local printing company, Apollonio²¹ that also printed the one by Mosè Gallottini which was also used in the same schools of Brescia; or the one of an unknown author who wrote a primer printed by the «Tipografia Martinelli»²², and distributed in schools in Como. Other writers of primers that had a rather limited distribution like the one by Luigi Bordis printed by the Turin typographer Speironi, was however very much appreciated probably due to the winning of a prize in occasion of the pedagogical Congress in 1869²³; other authors to be mentioned are Girolamo Giardini, Francesco Gazzetti, and P. Lavezzari whose primer was printed by Wilmont²⁴ a printing company in Milan, and primers used during the pre-unification period like the one by Lorenzo Molossi in the area of Parma²⁵. In central Italy, according to the supervisors of provincial school boards, the most recurring authors among the twenty who produced primers were Scavia and Troya; in respect of which seemed to resist Giovanni Parato and Vincenzo Garelli whose primers were adopted in schools in the provinces of Arezzo, Siena, Perugia, Ancona, Chieti,

¹⁹ G. Castrogiovanni, *Sillabario secondo il programma governativo per la sezione inferiore della prima classe elementare* approvato con decreto ministeriale del 18 aprile 1864, 4 ed., Torino, C. Favale, 1869.

²⁰ V. Garelli, *Sillabario graduato ad uso delle scuole degli adulti*, Genova, Tipografia del R. I. de' sordo-muti, 1869.

²¹ *La prima scuola, ossia nuovo Abbecedario ecc.*, di G.B. Rossini, Brescia, Tipografia Apollonio, 1868.

²² *Nuovo sillabario graduato ad uso delle Scuole Elementari del Regno d'Italia*, Como, Tip. Martinelli [1868].

²³ VI Congresso pedagogico in Torino (VI Pedagogical Congress in Torino), *Esposizione didattica. Sala X. Catalogo speciale delle opere d'istruzione e di educazione di espositori privati*, Torino, G.B. Paravia, 1869, p. 4.

²⁴ *Sillabario del maestro P. Lavezzari*, Milano, ditta Claudio Wilmont, 1867.

²⁵ In reality, what was being referred to was the primer by the author from Parma that was sold out with its last edition in 1844. L. Molossi, *Sillabario italiano ad uso delle scuole elementari*, Parma, 1844.

L'Aquila and Teramo. Even in the central regions, what can be noticed was the circulation of minor manuals such as readers. Among the texts circulating at the time, there were the ones by Giuseppe Bettini, Vincenzo Bianchi and Roberto Panzini; Luigi Bordis in Ancona, Giovanni De Mattei in L'Aquila and Eugenio Valentini in Ascoli Piceno²⁶.

After the primers by Scavia and Troya, the ones that were mostly distributed in the south were those written by Garelli, Carbonati and Castrogiovanni. In particular, their use was evidenced in the provinces of Naples, Salerno, Bari, Foggia, Potenza, Reggio Calabria and Sassari. In Bari the most utilised primers were the ones by Scavia, Garelli, Castrogiovanni, Parato and Pozzi; but Garelli's primer was believed to be the only one to be different from Scavia's, although it was difficult to use due to teachers' poor didactics preparation. According to the school board in Bari the success of these texts was attributed to the production of simple and graded books and the adoption of the syllabic method rather than the spelling method («compitatorio» method)²⁷.

In some provinces in the south, for instance in Bari, the primers by Lambruschini, Thouar and Troya were shown in the school year calendars. They were very much appreciated by the textbook committee, but in fact, they were not adopted in schools and to encourage their diffusion, it was decided to mention them in the lists of approved books.

Giovanni Lanza's primer, *Sillabario per le scuole rurali*, published by Paravia, was fully appreciated, this time in Naples. There was a minor distribution of primers published by local companies such as the one of the typographer Vitaliano Asturi in Catanzaro, or even primers that had been somewhat circulating in pre-unification period, like the one by Lelio Maria Fanelli which were used in schools in the province of Cosenza, the primer by Matteucci in use in schools in Naples and Salerno, the primer by Guacci for the all girls boarding schools in Naples, the primer by Musso in Salerno and the one written by

²⁶ Most likely the reports were referring to the primer written by V. Bianchi, R. Panzini, *Sillabario per l'insegnamento contemporaneo del leggere, dello scrivere e della nomenclatura*, of which it was possible to retrieve the edition issued in Ancona by G. Cherubini, 1874. "Relazione sui libri di testo per le scuole elementari del Consiglio scolastico provinciale di Ancona" (Report on textbooks for primary schools of the Provincial school board of Ancona), in ACS, MPI, F. CSPI, I Serie 1849-1903, Atti posteriormente versati, b. 3, f. 3; *Elenchi dei libri di testo scuole elementari inviati in risposta alla circolare n. 250 del 1869*. Also consult "Relazione sui libri di testo per le scuole elementari del Consiglio scolastico provinciale di L'Aquila" (Report on textbooks for primary schools of the Provincial school board of L'Aquila) and "Relazione sui libri di testo per le scuole elementari del Consiglio scolastico provinciale di Ascoli" (Piceno the Report on textbooks for primary schools of the Provincial school board of Ascoli Piceno), *ibid.*

²⁷ Refer to "Relazione sui libri di testo per le scuole elementari del Consiglio scolastico provinciale di Napoli, Salerno, Bari, Foggia, Potenza, Reggio Calabria, Sassari" (Reports on textbooks for primary schools of the Provincial school board of Naples, Salerno, Bari, Foggia, Potenza, Reggio Calabria, Sassari), *ibid.*

Luigi Stocchi and adopted in the primary schools in the province of Reggio Calabria²⁸.

In general, among the most common primers which had been reported by school boards, and which deserve to be mentioned, there was the one intended especially for rural schools entitled *Sillabario e prime letture per le scuole rurali* published in Turin by Fratelli Bocca that made use of the publishing house G.B. Paravia, and in 1869 reached its ninth edition; and the one for all girls schools in rural areas, *Sillabario e prime letture per le scuole femminili delle campagne*, which also reached its ninth edition printed by Paravia²⁹.

Starting from the late 1860s, there were signs of dissatisfaction with the primers in circulation in schools. The commission did not fail to express reservations about the texts in use. Some school boards in the northern area, such as those of Verona and Venice, began to approve the replacement of books by Scavia in favor of those by Parato and Troya³⁰. The committee established by the provincial school board of Bari, in turn, expressed criticism towards the primers by Troya and De Stefano which were very common in Campania and in Liguria: although they were admitted they did not hesitate to ask for «easier» primers which «better accommodated and were more proper to pupils of different ages». De Castro's primer was not approved, while the text by Andrea Gabrieli obtained a significant acclaim. Bruto Fabbricatore, a member of the committee that in Naples examined the production of primers, tore to pieces the text by Giovanni Scavia, «it has no particular value that distinguishes it» strongly declared one of the greatest exponents of the so called «puotismo», the southern linguistic (or lingual) movement³¹. However, it is during the mid 1870s that the most significant signs of change were recorded. A significant indicator of this process of change is provided by those experts who analyzed the forty-nine primers that the commission established by Bonghi got hold of. Among the primers considered still valid, the commission recorded slightly over one-third, which is seventeen; however, only nine of these were really considered to be the best³². Among the authors who were considered favourably was

²⁸ See the *Reports on textbooks for primary schools of the Provincial school board of Naples*, Salerno, Potenza, Reggio Calabria, *ibid*.

²⁹ *Sillabario e prime letture per le scuole rurali*, 9^a ed., Torino, Fratelli Bocca, tipografia di G.B. Paravia, 1869; *Sillabario e prime letture per le scuole femminili delle campagne*, Torino, G.B. Paravia, 1869, 9^a ed.

³⁰ “Relazione sui libri di testo per le scuole elementari del Consiglio scolastico provinciale di Verona” (Reports on textbooks for primary schools of the Provincial school board of Verona), in ACS, MPI, F. CSPI, I Serie 1849-1903, Atti posteriormente versati, b. 3, f. 3: *Elenchi dei libri di testo scuole elementari inviati in risposta alla circolare n. 250 del 1869*; “Relazione sui libri di testo per le scuole elementari del Consiglio scolastico provinciale di Venezia” (Reports on textbooks for primary schools of the Provincial school board of Venice), *ibid*.

³¹ See professor Bruto Fabbricatore's report on primers for the year 1868-1869 enclosed to the “Relazione sui libri di testo per le scuole elementari del Consiglio scolastico provinciale di Napoli” (Reports on textbooks for primary schools of the Provincial school board of Naples), *ibid*.

³² «Puotismo» – term derived from the Italian grammarian Basilio Puoti (1782-1847),

firstly Professor Carlo Azzi, a teacher of middle school in Ferrara, author of a manual of «preparatory exercises to reading» for the primary school printed in Ferrara in 1860, shortly after the national unity, by the «Regia Tipografia Bresciani»; secondly the schoolmaster Massimiliano Barbieri whose primer presented a novelty which was the inclusion of many images that, according to the teacher, would facilitate the association between words and pictures. Barbieri had already made an «*Nomenclatura italiana figurata*» (Italian picture nomenclature) accompanied by an appendix of 1,100 names of arts and crafts which in 1871 had already reached the seventh edition; and lastly the priest and professor Giovanni Lanza from Alessandria³³.

Among the authors who had lost consideration were those whose texts had widely circulated in the Italian schools for the past decade and, as will be seen, still continued to be present for several years ahead. The primers and reading exercise booklets by authors such as Agapito Agabiti, Giuseppe Borgogno, the reading exercise booklet by Vincenzo Troya, and Giovanni Scavia, in fact, were considered at that time, as «mediocre»; those of authors such as Giovanni

member of the Academy of the Crusca and Inspector of the Kingdom of the two Sicilies. The seventeen primers and reading exercise booklets that were approved by the Commission were the following: C. Azzi, *Sillabario pei fanciulli, compilato colla pronuncia da Carlo Azzi e Scipione Benedetti*, Firenze, F. Paggi, 1874, 4 ed.; M[assimiliano] Barbieri, *Nuovo sillabario figurato ossia nuovo metodo fonico sillabico: ornato di oltre 200 figure atte a promuovere l'attenzione dei fanciulli ed aiutare l'intelligenza nell'apprendere la lettura con maggior facilità ed in brevissimo tempo*, Bologna, Stab. tip. Monti, presso l'autore, 1872; S.[ilvestro] Bini, *Sillabario secondo il programma governativo per la sezione inferiore della prima classe elementare per le scuole domenicali, serali e rurali d'Italia, compilato dal professor Silvestro Bini*, Firenze, Libreria scolastica di A. Casale e Comp., 1867; O.[reste] Bruni, *Il primo libro del fanciulletto*, Roma, G.B. Paravia, 3^a ed., 1879; G.[iovanni] Lanza, *Sillabario e prime letture per le scuole femminili delle campagne*, Torino, G.B. Paravia, 12^a ed., 1874; Ead., *Sillabario e prime letture per le scuole rurali*, Roma, G.B. Paravia, 32^a ed., 1880; E.[milia] Siri, *Sillabario per le scuole elementari. Metodo per insegnare a leggere ossia il sillabario*, Firenze, Paggi, 1871 [consultata ed. 1862]; G.[iovanni] Parato, *Il piccolo sillabario delle scuole rurali con i primi esercizi di lettura corrente per C.M. e Giovanni Parato*, Roma, Firenze, Torino, Milano, G.B. Paravia e Comp., 1876, 10^a ed.; C.[arlo] Pozzi, *Sillabario ossia esercizi graduati e simultanei di lettura, scrittura e calcolo mentale con oppositi nodelli litografici: per gli allievi e per le allieve della prima elementare inferiore urbana e rurale nel primo semestre scolastico*, Torino, Pozzi Carlo, 1874; Ead., *Sillabario per gli allievi e per le allieve della prima elementare inferiore urbana e rurale nel primo semestre scolastico*, Torino, Tarizzo, 1875. G.[iovanni] Scavia, *Sillabario per i bambini della 1° classe elementare sezione inferiore*, Torino, Grato Scioldo, 1861; Ead., *Piccolo Sillabario con figure ad uso degli asili infantili, della 1° classe elementare inferiore e delle scuole rurali maschili e femminili*, Torino, Grato Scioldo, 1876; Ead., *Prime letture a compimento del sillabario per la prima classe elementare: sezione inferiore*, Torino, Grato Scioldo, 1883 [la edizione consultata]; V.[incenzo] Troya, *Nuovo sillabario graduato di Vincenzo Troya per la sezione inferiore della prima classe elementare, senza anno e casa editrice*; Ead., *Sillabario proposto dal Cav. E Professor Vincenzo Troya alle scuole serali e festive per ammaestramento degli adulti analfabeti*, Torino, G.B. Paravia, 1873; Ead., *Compimento del sillabario e primi esercizi graduati di lettura corrente per la sezione inferiore della prima classe elementare maschile e femminile*, Genova, Tipografia del R. I. de' sordomuti, 1872, 34^a ed. [consultata ed. del 1861].

³³ On the figure of the priest, consult the profile in G. Chiosso, R. Sani (edd.), *Dizionario Biografico dell'Educazione (1800-2000)* [from now on DBE], Milano, Editrice Bibliografica, 2013 *ad vocem*.

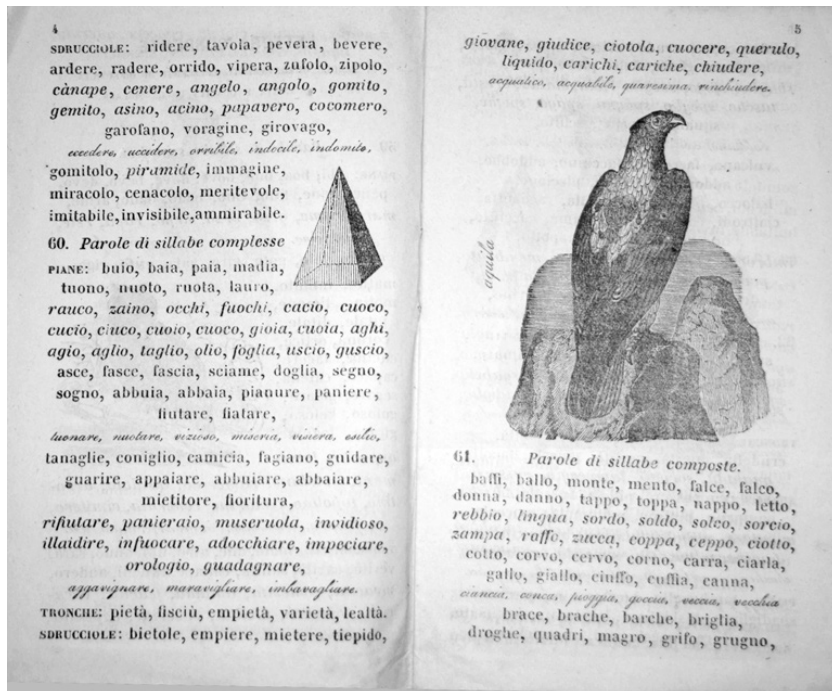
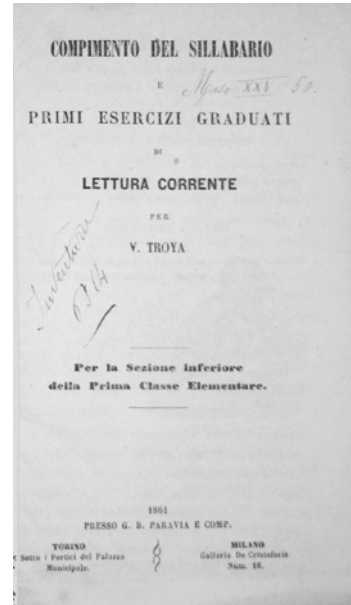
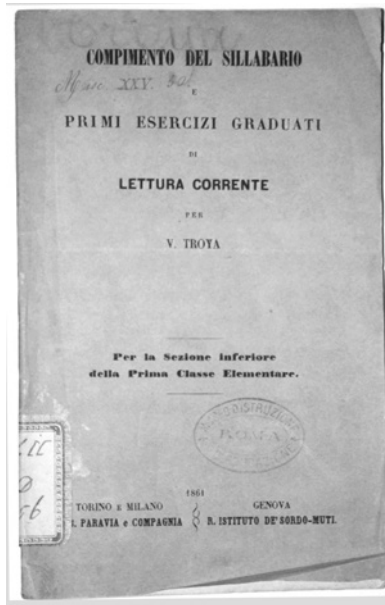
Castrogiovanni, Giovanni Parato, Vincenzo Garelli, Giovanni De Mattei, Luigi Stocchi and others, as actually being not appropriate for use.

Despite the considerations of the two experts called to give feedback on the quality of the primers, although the texts were considered outdated they continued, in fact, to be adopted in schools. Rich in detail, in this sense, were the reports that inspectors of sixty-three districts transmitted to the Ministry of Education following the circular in which the minister Bonghi urged the resumption of attention to textbooks³⁴. The texts by Scavia and Troya, although to a lesser extent, continued to be the most popular in Italian schools. In northern Italy the text *Sillabario* (Primer) by Scavia, published by Paravia, the publishing company in Turin, was detected in 17% of cases in the inspectors' reports. For a little less than 13% of the times there was reference to the text *Nuovo sillabario graduato* (New graduated primer) by Troya published by the printing company Tipografia Sordomuti di Genova³⁵; followed by the primer written by Carlo Pozzi that was frequently used in 9,8% of the cases examined by the inspectors³⁶. In the regional areas of northern Italy, the graduated primer

³⁴ For this important political and legislative transition consult Barausse, *La biblioteca dello scolaro italiano. La questione dei libri di testo e della manualistica scolastica dall'Unità all'avvento del fascismo*, cit. The 63 inspectors' reports consider 22 districts in northern Italy, 18 districts in central Italy and 23 districts in southern Italy. Among the first reports were the ones of the piedmontese district of Cuneo (Porzia Giovanola); the ones of the districts in Liguria: Genova (Bianchi Giacinto), Chiavari and Levante (Bianchi Giacinto), Savona and Albenga; districts in Lombardy: Bergamo, Brenno and Salò, Brescia and Chiari, Clusone, Cremona (Orengo Emilio), Milano, Sondrio, Varese; the districts in Emilia Romagna: Parma (Pietro Perutelli), Piacenza, Ravenna, Reggio nell'Emilia; of the districts in Veneto: Padova (Bonomo Francesco), Cittadella, Rovigo, Treviso, Venezia, Verona, Vicenza, Bassano (?). Among the second reports, the ones of the districts in Tuscany: Grosseto, Livorno and Isola d'Elba, Lucca, Massa and Carrara, Pisa and Volterra, Pistoia and S. Miniato, Siena; of the districts in Marche: Ancona, Macerata, Pesaro and Urbino; of the districts in Umbria: Perugia and Orvieto (Sala Filippo), Spoleto and Foligno; of the districts in Abruzzo and Molise: Aquila (Fedele Tornari), Sulmona and Avezzano, Chieti, Lanciano and Vasto, Campobasso and Larino, Isernia; of the districts in Lazio: Roma, Frosinone and Velletri. Among the third, the ones of the districts in Puglia: Bari and Barletta (Cotantino Vitti); of the districts in Campania: Benevento, Napoli, Casoria and Pozzuoli, Castellamare, S. Angelo dei Lombardi; of the districts in Calabria: Catanzaro and Crotona, Cosenza and Paola, Monteleone and Nicastro, Reggio, Palmi and Gerace, of the districts in Sicily: Bivona and Sciacca, Caltanissetta Piazza and Terranova, Girgenti (Leopoldo Sileci), Messina, Mistretta and Patti, Nicosia, Siracusa, Modica and Noto, Vallo and Sala; of the districts in Sardinia: Cagliari and Iglesias, Oristano and Lanusei.

³⁵ This primer continued to circulate with another edition, the 1873 one under another title, *Sillabario graduato*, edited by two publishing companies the Tipografia Sordomuti in Genoa and Paravia in Turin; it was a thicker volume, also found in the schools in Milan, but it presented a great error in the positioning of diphthongs which the author realized and for this reason decided to write a new edition of the book.

³⁶ Consult the reports of the piedmontese district of Cuneo (Porzia Giovanola); of the districts in Liguria: Genova (Bianchi Giacinto), Chiavari and Levante (Bianchi Giacinto), Savona and Albenga; districts in Lombardy: Bergamo, Brenno and Salò, Brescia and Chiari, Clusone, Cremona (Orengo Emilio), Milano, Sondrio, Varese; of the districts in Emilia Romagna: Parma (Pietro Perutelli), Piacenza, Ravenna, Reggio nell'Emilia; districts in Veneto: Padova (Bonomo



Pics. 4 a-b-c. Vincenzo Troya, *Compimento del Sillabario e primi esercizi di lettura*, Genova, Sordo Muti, 1874 (courtesy Library of Philosophy of the University of Rome "La Sapienza").

and the reading exercise book by Troya were widely diffused in the whole area of Piedmont – according to Inspector Cuneo – because of its simplicity it was adopted in almost all schools especially the rural ones, together with the one from a brother of Christian schools modeled on that of Troya's (CN). In some contexts, such as the one in Cuneo, particularly appreciated were, in addition to the text by Troya, even those by Cipriano or Carlo Mottura and Giovanni Parato³⁷.

In the schools of the district of Genoa, the primer which was instead particularly appreciated, especially in relation to the gradualness in the pedagogic approach was the one written by Antonio Bruni, who, according to the inspector, also had the merit of not presenting «boring nursery rhymes of syllables and meaningless words but sentences and thoughts arranged for the purpose»³⁸. A primer produced in the south was rarely found in schools in the north. It was still the Genoese inspector, for example, to report, in addition to primers based on the syllabic method, the introduction of a primer found in schools in the South, the one by Vincenzo De Castro, which integrated with rural posters, appeared to be very suitable for the type of methodological approach that was used, namely the phonic type³⁹.

In these years the local production of primers written especially by teachers continued to grow. This production, however, not always passes the approval of inspectors; only in some cases, in the presence of very careful ones, this specific production emerges. For example, the local production had a certain importance in Bassano, a district in the area of Vicenza, where it seems that thirteen primers were distributed, although the inspector considers only four of them, for their appropriateness and validity: two written by local teachers, Boeche and Ciscato, the two written by Scavia and Garelli, distributed on national scale. In particular the inspector's opinion regarding the primer written

Francesco), Cittadella, Rovigo, Treviso, Venezia, Verona, Vicenza, Bassano. ACS, MPI, CSPI, I Serie, Atti versati posteriormente (1849-1903), b. 4, f. 5, *Risposte degli ispettori scolastici alla circolare 1 novembre 1874*, n. 405 sui libri di testo più usati nelle scuole elementari (1874-1875).

³⁷ (Report of the school inspector of the district of Cuneo) Relazione dell'ispettore scolastico del Circondario di Cuneo del 30 novembre 1874, in ACS, MPI, CSPI, I Serie, Atti versati posteriormente (1849-1903), b. 4, f. 5, *Risposte degli ispettori scolastici alla circolare 1 novembre 1874*, n. 405 sui libri di testo più usati nelle scuole elementari (1874-1875).

³⁸ (Report of the school inspector of the districts of Genoa, Chiavari and Levante) Relazione dell'ispettore scolastico dei Circondari di Genova, Chiavari e Levante del 20 dicembre 1874, *ibid.*

³⁹ "When I was in Sicily, I also saw teachers use the graduated primer with the phonic method, written by Vincenzo De Castro. It opens with a brief introduction for elementary school teachers so that they know how to use it correctly. This primer is combined with a rural poster, that displays all the combinations of the simple, complex and compound syllables to form words and clauses of many kinds. Perhaps this phonic method, with time, will prevail over the syllabic one, just like the reading exercise booklets has. The poster by De Castro would be useful in rural schools, especially if considering its affordable price", *ibid.*

by the schoolmaster in primary schools in Vicenza, Bernardino Ciscato⁴⁰, who also was an Italian teacher at an all boys teachers' college, was rather flattering:

The primer based on the approach of contemporary reading and writing, published two years ago by Bernardino Ciscato is increasingly gaining favor in the province, after the great approval it has received lately in high schools and adult schools in the districts of Valdagno, Schio, Vicenza and Lonigo. It starts with posture exercises of the head, exercises on how to hold a pen followed by preparatory exercises on writing; it then moves on to the teaching of writing only after the first signs of writing, down to writing by imitation, and after dictation writing, becoming in a short time a more natural model and making it easier to write, since the words are read in the same way you write them. Once reached hyphenation, it moves on to reading exercises, alternating italic and printed fonts, to end with only the printed font. The primer by Ciscato is superior in my opinion to those of Gazzetti and Garelli which follow the same approach; and the only obstacle which does not make it competitive and therefore it is limited in terms of circulation is its higher cover price due to being lithographic. When the teacher knows how to make good use of it, I believe it will equally be good for rural schools. As a matter of fact, this year it has been adopted as a text in all the upper and lower schools in the town of Vicenza⁴¹.

Or in Verona where the inspector expressed a very positive evaluation of the primer developed by a local teacher, Luigi Panizzoni:

Finally, I recommend the «*Nuovo Sillabario*» written, following only the syllabic method, by Luigi Panizzoni, an experienced and talented teacher who has been working in primary schools in Verona for thirty years. Qualities that distinguish this little text are: the application of the principle of graduation throughout the text, the convenient choice of exercises which develop not only the pupils' reading skills, but also their intellectual faculties and educate their hearts. This primer has proved to be successful and is being used in schools in Verona and also in many rural ones.

In the schools of the districts of central Italy the most used primers were the ones written by Troya and Scavia, followed by the ones written by Bini, Pozzi, Giovanni Parato, Castrogiovanni, Garelli, Carbonati, De Castro, Pozzi and Melga, Bettini, Thouar, Borgogno, Barbieri, Altavilla, Rosa, Fanucci, Ricci, Gastaldi⁴². For the inspector in Massa Carrara Antonio Bruni, himself author

⁴⁰ Bernardino Ciscato was born in Velo d'Astico on 18 agosto 1834. He was an elementary schoolmaster and first taught in Valdagno, between 1863 and 1866, and then in the schools in the township of Vicenza until 1893. Between 1884 and 1891, he also directed the school in S. Marcello, instead during the years between 1872 and 1876, he was a maths teacher in the only girls' magistral school in Vicenza, and during the years between 1877 and 1882, he taught the Italian language in the only boys' magistral school in Vicenza. See S. Runor, *Gli scrittori vicentini dei secoli decimottavo e decimonono*, Venezia, Tipografia Emiliana, 1904, Vol. I, A-F, *ad vocem*.

⁴¹ Relazione dell'ispettore scolastico del Circondario di Bassano (Vicenza) del 29 novembre 1874 (Reports of the inspectors of the districts of Bassano (Vicenza) of 29th November 1874, in ACS, MPI, CSPI, I Serie, Atti versati posteriormente (1849-1903), b. 4, f. 5, *Risposte degli ispettori scolastici alla circolare 1 novembre 1874, n. 405 sui libri di testo più usati nelle scuole elementari (1874-1875)*).

⁴² See the reports of the inspectors of the following districts in Tuscany: Grosseto, Livorno and

of a text, Scavia's primer was the most successful because of its simplicity. He considered it better than the ones by Wells and Troya that, in his view, had the defect of incorporating different fonts⁴³. Even for the inspector of Ancona, the best primers were those by Scavia and Troya because they respected the principle of gradualism; although for Sunday school and evening classes, Garell's was considered the most useful because it presented a faster method⁴⁴.

As for the schools of the districts of southern Italy and the islands, Scavia was mentioned even more in the inspectors' reports, his primer was cited in 32% of cases; as well as Troya's in 21% of the reports, and lastly Pozzi with 15%. In 6% of the cases the names of Castrogiovanni and G. Parato appeared and in 3% of the reports the following are found: Mottura and Parato, Pozzi and Melga, Bini, Borgogno, De Pamphilis, Arces, Giudice⁴⁵. According to some inspectors, different were the reasons leading to prefer the adoption of primers written by Scavia and Troya. The inspector of schools in the district of Naples asserted that Scavia's and Troya's primers were found to be by far the most popular because they had best interpreted the transition from the alphabetical method to the syllabic one⁴⁶. In the district of Nicastro, the primer written by Scavia was preferred for its strong educational characterization and religious and civil morals⁴⁷; while in Caltanissetta, Troya's primer was especially praised for its clarity and simplicity and firstly because it respected the law of gradualness, secondly it made use of verbs, adverbs, adjectives and nouns that expressed the reality known to children; and last but not least, because of its tenuous

Isola d'Elba, Lucca, Massa and Carrara, Pisa e Volterra, Pistoia and S. Miniato, Siena; the reports of inspectors of districts in the region Marche: Ancona, Macerata, Pesaro and Urbino; reports of the inspectors of the districts in Umbria: Perugia and Orvieto (Sala Filippo), Spoleto and Foligno; reports of the inspectors of the districts in Abruzzo-Molise: Aquila (Fedele Tornari), Sulmona and Avezzano, Chieti, Lanciano and Vasto, Campobasso and Larino, Isernia; reports of the inspectors of the districts in Lazio, Roma, Frosinone and Velletri.

⁴³ See the "Relazione dell'ispettore scolastico dei Circondari di Massa e Carrara del 5 dicembre 1874" (Reports of the inspectors of the districts of Massa and Carrara of 5th December 1874), *ibid.*

⁴⁴ See the "Relazione dell'ispettore scolastico del Circondario di Ancona del 14 marzo 1875" (Reports of the inspectors of the district of Ancona 14 March 1875), *ibid.*

⁴⁵ See the reports of the inspectors of the districts in Puglia: Bari and Barletta (Cotantino Vitti); in Campania: Benevento, Napoli, Casoria e Pozzuoli, Castellamare, S. Angelo dei Lombardi; in Calabria: Catanzaro and Crotone, Cosenza and Paola, Monteleone and Nicastro, Reggio, Palmi and Gerace; in Sicily: Bivona and Sciacca, Caltanissetta Piazza and Terranova, Girgenti (Leopoldo Sileci), Messina, Mistretta e Patti, Nicosia, Siracusa, Modica and Noto, Vallo and Sala; in Sardinia: Cagliari and Iglesias, Oristano and Lanusei in ACS, MPI, CSPI, I Serie, Atti versati posteriormente (1849-1903), b. 4, f. 5, *Risposte degli ispettori scolastici alla circolare 1 novembre 1874, n. 405 sui libri di testo più usati nelle scuole elementari (1874-1875)*.

⁴⁶ See "Relazione dell'ispettore scolastico del Circondario di Napoli del 15 febbraio 1875" (Reports of the inspector of the district of Naples 15 February 1875), *ibid.*

⁴⁷ See "Relazione dell'ispettore scolastico dei Circondari di Monteleone e Nicastro del 21 novembre e del 20 novembre 1874" (Reports of the inspector of the districts of Monteleone and Nicastro 21 Novembre and 20 November 1874), *ibid.*

price. The only drawback, in the inspector's view, was the difficulty of being able to use it according to the contemporary method of reading and writing⁴⁸. Instead, for the inspector in Trapani, Castrogiovanni's text was the one that had proved to be most successful; it was rich in «moral maxims» which, in his opinion, should be the central aim of education even though it often lacked the characteristic of gradualness:

if these maxims are not distributed in the books in a way that touches the heart with the harmonic law of gradation. The book that teaches the child to be obedient in one page, and in the one immediately after not to steal, is not according to me, a book that can conquer the pupil's heart, since I do not see the moral faculties dissimilar from the physical and intellectual ones; in order to be carried out, it is appropriate to proceed from easy to difficult, from the known to the unknown⁴⁹.

Even the inspector of schools in Sardinia, more precisely in Oristano and Lanusei, did not hesitate to recognize «the scientific truth, the literary merit and didactic value» of the three most commonly used primers in the district, those of Pozzi, Scavia and Parato. What came into play, in this case, and discussed among the experts, was the scientific knowledge recognized cohesively of metrology, of correct pronunciation and spelling, of the use of the number and type of diphthongs, of triphthongs as well as the simple direct and inverse syllables or composed syllables. Moreover, what was also in favour of the authors was their search for adequate didactic tools catered to children's age⁵⁰.

However, the inspectors' opinions were ambiguous and critical considerations were beginning to emerge, starting from those regarding methodology, they were more and more significant towards primers that had dominated within school handbooks for the teaching of reading and writing. The inspector of Genoa, for example, pointed out how Troya's work presented as a drawback the 'slowness' while Scavia's was lacking whole words which were not divided into syllables, whereas if employed, it would have spared pupils to use the reading exercise booklet with a significant savings in the cover price⁵¹. The inspector of Milan considered instead Mottura's and Parato's primers inappropriate for

⁴⁸ See "Relazione dell'ispettore scolastico dei Circondari di Caltanissetta, Piazza e Terranova del 31 dicembre 1874" (Reports of the inspector of the districts of Caltanissetta, Piazza and Terranova 31 December 1874), *ibid.*

⁴⁹ See "Relazione dell'ispettore scolastico del Circondario di Trapani [inviata però da Lucca] del 5 novembre 1874" (Reports of the inspector of the district of Trapani [sent from Lucca] 5 November 1874), *ibid.*

⁵⁰ See "Relazione dell'ispettore scolastico dei Circondari di Oristano e Lanusei del 24 novembre 1874" (Report of the inspector of the district of Oristano and Lanusei of 24 November 1874), *ibid.*

⁵¹ See "Relazione dell'ispettore scolastico dei Circondari di Genova, Chiavari e Levante del 20 dicembre 1874" (Report of the inspector of the district of Genoa, Chiavari and Levante 20 December 1874), *ibid.*

use⁵². According to the inspector of Aquila, there was an infinite number of primers which were all similar to one another, instead the blackboard was to be considered the best primer; but if one really wanted to choose a primer, he referred to a text, rather widespread in the area of Parma during the pre-unification period, which was the primer by Lorenzo Molossi printed in Parma in 1845⁵³.

There is a lot and great confusion on the texts adopted by the teachers of these schools and the blame goes to the multitude of writings less than mediocre that booksellers, greedy of gain, spread and recommend with pretentious words and lying promises that the Minister will have more consideration for those who will adopt them. First of all, I want to mention the primers a little; there are an infinite number of them and they are all very similar to one another for the lack of logic and common sense being that every schoolmaster released his text by copying the ones of others with a few modifications and gives it to those who are more inept than him to sell in order to earn a little when possible. They present syllables clashed together at random without any true meaning, and whoever enters the school seems to hear *Pape Satan Pape Satan Aleppe* put from Alighieri in the mouth of Pluto and *Raphel mai amech tabi al mi* put in the mouth of Nembrotti so that the children do not acquire any idea by uttering those items that are not words, or, if they are, they are not explained as they should be. Most of these booklets seem antiquated also in the form, where they are written and printed. The author, for the sake of example, wants to express the following proposition: *temerete i pericoli* (you will be afraid of the dangers) and writes and publishes it in syllables as follows: *te- me- re- te i pe- ri- co- li*; therefore the children, and sometimes even the teacher reads: *temerete i peri- coli* without understanding anything, and without realizing that the author intended to write a sentence. All the primers I have seen are like this, the one by Troya, by Scavia, by Bini, by Borgogno, by Barbieri, by Altavilla, by Castrogiovanni, and many others whose names I cannot remember. The true primer, for me, is the blackboard on which the teacher can use syllables to form words that have a meaning and expose and explain them to his pupils. But if you really wanted to adopt a primer, the one I prefer is Molossi's of Parma that was published in 1845, and after the author's death it was not edited again. This primer is a golden guide with questions that the teacher can ask children according to the natural order of ideas to guide them slowly to the reading of the words that he defines as real property of language, so that what may remain etched in their minds are the words of the things that surround them. Molossi, through his primer, can manage to excite the minds of children of that age, so

⁵² See "Relazione dell'ispettore scolastico del Circondario di Milano del 22 dicembre 1874" (Report of the inspector of the district of Milan 22 December 1874), *ibid.*

⁵³ See "Relazioni dell'ispettore scolastico dei Circondari di Aquila e Città-Ducale sui libri di testo del 18 gennaio 1875 e del 22 gennaio 1875" (Reports of the inspector of the districts of Aquila and Città-Ducale 18 January 1875 and 22 January 1875), *ibid.*

that they may discuss with easy long sequence of objects, shapes, concepts, ideas without confusing them.

Compared to what was recorded during the first years after the Unification, also in southern schools the circulation of texts increased and the hegemony of the texts by Scavia, Troya and Parato began to wane gradually giving way to primers by other authors. According to the inspector of Naples, the primer by Parato, while trying to reconcile the old with the new system, did not seem to be suitable for the early elementary grades⁵⁴. A slight growth in the local production and the slow development of the editorial market in the South was also caught by the inspectors of the southern districts. The inspector of Caltanissetta noted, for example, *Nuovo sillabario graduato per Alfonso Arces*, (New graduated primer for Alfonso Arces) by a teacher of the municipal schools in Palermo, published by a small company, the «Terzi di Palermo», in 1873, and was awarded at the VII Pedagogical Congress in Naples⁵⁵. In other cases, as in Bari, the primer by Giacinto De Pamphilis was preferred to those of Bini, Borgogno and Scavia because of its link to the «puotian» tradition⁵⁶.

3. *The evolution of production in the years of Historical Left (1876-1898)*

During the decades of governing of the Historical Left, the overall volume of production of primers and reading exercise booklets recorded a considerable growth. In fact, between 1876 and 1898, in total at least 669 copies, including primers and reading exercise booklets, were certainly published. The places of publication increased to 118. If the long period of the Left is divided between the years of the Depretis government and the years of the Crispi government, what can be noticed is a progressive growth. Between 1876 and 1888, year in which Boselli's new programs inspired by positivism were issued, 220 new primers were produced by 160 publishers and printers in 72 different places. A fact which attests the steady increase of attention by school publishing at the time, also confirmed in the decade marked by the experience of Crispi and the crisis of the end of the century. Subsequently, in fact, between 1889 and 1898 a good 449 primers and reading exercise booklets were published as new editions or as reissues of previous titles. In the end about 355 among printers and publishers were involved in the production of primers and reading exercise

⁵⁴ See "Relazione dell'ispettore scolastico del Circondario di Napoli del 15 febbraio 1875" (Report of the inspector of the district of Naples 22 February 1875), *ibid.*

⁵⁵ See "Relazione dell'ispettore scolastico dei Circondari di Caltanissetta, Piazza e Terranova del 31 dicembre 1874" (Report of the inspector of the districts of Caltanissetta, piazza and Terranova 31 December 1874), *ibid.*

⁵⁶ See "Relazione dell'ispettore scolastico dei Circondari di Bari e Barletta del 8 dicembre 1874" (Report of the inspector of the districts of Bari and Barletta 8 December 1874), *ibid.*

booklets for primary schools. This to prove that these types of books began to attract an increasing number of publishing houses, probably in relation to the processes of gradual extension of literacy and schooling that were taking place during the nineteenth century and which was parallel to the growing dissemination of periodicals for teachers. Within this production increase, it is possible to detect a significant evolution of editors getting involved in publishing titles belonging to the specific area of the first books for the learning of reading and writing. During the long period of governing of the Historical Left, printer-publishers who turned out to be most involved in the production of textbooks for the teaching of reading and writing were undoubtedly still linked to the major editorial centers such as the one in Turin, that, throughout this period, assured about one-sixth of the whole production of manuals to learn reading and writing (equal to 136 titles), in which the company Paravia continued to hold a dominant role on the market by ensuring a good number of titles, eighty-two among primers and reading exercise booklets. The rest of the texts remained divided among smaller printers and publishers like Grato Scioldo previously called Vaccarino with the publishing of fourteen titles, Giulio Speironi with four titles, G.B. Petrini with two, Tarizzo with three, Cerruti, Loescher, and Roux and Favale with only one title. Surely Turin, capital of Piedmont, continued to exercise a monopolistic role in the region where only a few cases of smaller printers managed to occupy some space in the publishing of primers as is the case of the thirteen titles identified and printed by small printing companies in Alba, Alessandria, Cuneo, Mondovì, Saluzzo during a period of twenty-two years. Turin was no longer the only area quantitatively stronger, now being countered by the production of titles in the Florentine and Milanese areas. The Milanese context, in fact, secured the edition of 120 titles, counting on printers and publishers as dynamic as Vallardi or Trevisini that edited respectively 28 and 17 books including primers and reading exercise booklets. A more limited production, nonetheless, was secured by a larger number of printers and publishers such as Carrara, Massa, Pagnoni, Messaggi, Sonzogno, Debalà or Wilment.

The reality in Milan exercised a strong attraction leaving little space in the market for readers and reading exercise booklets to other typographic and editorial realities in Lombardy such as the ones located in Pavia (Marelli), Mantova (Stab. Tip. Mondovì), Brescia (Apollonio), Bergamo (Stab. Tip. Lit. Fr.lli Bolis), Varese (Tip. May e Malnati) which published the remaining thirty-one titles which have been identified. In Tuscany the ninety-one titles were produced mainly by Florentine publishing and printing companies with Bemporad that issued twenty-seven titles, Felice Paggi twelve, and Salani seven. Aside from them, there was the contribution of smaller printers and publishers, with a much more limited and occasional number of texts such as the one in Livorno Giusti (four), Sansoni (three) and Barbera (one). What should be noted with this data, is that in these years a large number of provincial publishers and

printers approached school publishing by using mostly local teachers as authors and giving them the opportunity to write primers and reading exercise booklets.

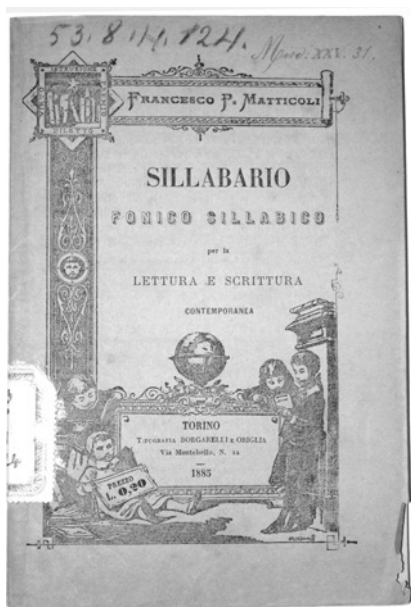
If in the area of Liguria, Genoa was another hub that aggregated nearly the whole demand of publication of primers, mainly due to the *Tipografia dell'Istituto dei Sordo-muti*, or to the one connected to the periodical «*L'Educatore Ligure*» or, also to the publisher F. Lombardi and C., the situation in Veneto and Emilia-Romagna was quite different. Here, what can be observed, was a more fragmented reality which obviously was able to cover teachers' demand for primers-among all three areas- in one-sixth of the total production registered in twenty-two years. The typographical and editorial reality in the Triveneta area was one where twenty titles were published during the period between 1876 and 1888 and another twenty in the years between 1889 and 1898, attributed to the availability of thirty among publishers and printers in Padua, Verona, Venice, Vicenza, Belluno, Treviso, Udine, Rovigo and Ferrara. Among these, it is worth mentioning the *Stabilimento Tipografico Apollonio* in Verona, the *Civelli* one or the *Tipografia Reale Burato* in Vicenza. A similar way of operating, in the period which is being considered, in the typographical and editorial market in Emilia-Romagna that, in those same years, produced a total number of sixty titles, eighteen of which were released in the first twelve years and forty-two in the next ten. One-third of the total volume of production was assured by the publisher Louis Battei in Parma, but the remaining were edited by thirty-three smaller printers and publishers distributed in the areas of Bologna, Modena, Reggio Emilia, and Piacenza including the *Stabilimento* of Zamorani and Albertazzi, G.T. Vincenzi and grandchildren, Leopoldo Bassi, A. Del Maino, Fratelli Bernardi, Augusto Asioli.

The production of primers in the central regions was quite limited. Overall, in fact, only forty-nine titles were released. Lazio was not particularly flourishing. The only publishers and printers who, in the present state of this research, were involved in the publication of primers, were the publisher Claudio Stracca in Frosinone and the typographer Pansera in Fondi. Not even the editors and typographers set in Rome seemed to be very careful to capture the demand growth: the capital city secured the release of eighteen titles including five by the Roman branch of Paravia, and the remaining divided among the publishing company «*Dante Alighieri*», the «*Tipografia Nazionale G. Bertero*», the printing press of «*F.lli Pallotta*», the «*Avvenire dei maestri italiani*» of Giovanni Merighi, the «*Tipografia Forzani and C.*», the «*Tip. della R. Accademia dei Lincei*», and the «*Tip. Metodista*». The editorial situation in Marche, Umbria and Abruzzo was even less competitive. In the Marche region, six of the eight titles which had been printed, were produced in the first decade of the Historical Left, on the initiative of small printers located not only in Ancona but also in Sanseverino Marche, Loreto, Osimo and Pesaro. If in Umbria only six titles found space, two of them between 1876 and 1888, thanks to the presence in Foligno, in Umbertide and in Rieti of small printing shops, in Abruzzo two-

thirds of the total production in the period under investigation - nine out of the fifteen titles- were secured by the first developments of the publisher Rocco Carabba in Lanciano along with typographers in Vasto and L'Aquila.

During the twenty-two years between the advent of Coppino to the Ministry of Education, in the first government of the Historical Left, and the institutional crisis at the end of the century, what seems surprising is the presence of a larger number of printers and publishers ready to meet the growing demand for the production of primers and reading exercise booklets in the southern area of the country. This is not a process of limited expansion which passes not only through larger areas but also through a more fragmented typographical and publishing reality. Overall, in fact, typographers and editors in the south released 109 products: forty-seven in the period up to the approval of the new programs of 1888 and 62 thereafter. The dominant part was carried out in the area of Campania and in Sicily. Between 1876 and 1898 thirty-one titles were produced in Campania, fourteen during the period of the government headed by Depretis and seventeen during the Crispi government. Surely a third of the production recorded in Campania was made in Naples thanks to the activity of different printers and publishers: Antonio Morano's company was not the only one to show interest in the growing demand for teachers and authors, but also the «Tipografia De Angelis and Bellisario», with three titles, «Stabilimento Tipografico of Vincenzo Pesole» with two titles and small publishers such as Bideri, Cyro Petruzzelli with only title. In a similar way, even within the area of Sicily the sixty-five titles published over the course of twenty-two years, were mainly published by printing houses in Palermo that produced forty-nine among primers and reading exercise booklets. It was the development of Remo Sandron's typographic editorial society, which alone covered twenty-six titles – twenty-four of them in the Crispino period – that made a significant primacy in the Sicilian capital and which did not meet great competitors in terms of publishing primers used for teaching reading and writing. Thirteen primers were printed in Catania, Messina, Caltanissetta, Sciacca e Girgenti. It is significant, however, that ten of these were produced in the decade between 1876 and 1888, while only three being subsequently published. In Palermo, Sandron's accomplishment on the publishing of basic handbooks for primary schools, was accompanied by the attention of printers and publishers such as Salvatore Biondo that towards the end of the century issued six texts, Luigi Pedone Lauriel three and Benedetto Lima two.

The dissemination and circulation of primers and reading exercise booklets for the first readings in the south was therefore influenced mainly by competition and by the conquest of the market between the urban typographies and publishers in Naples and Palermo, while in other regional contexts, the phenomenon was marked by the presence of minor typographical businesses and distributed in an inconsistent manner and quantitatively less significant. Thus, for example, to print the five titles of primers in Puglia, minor printers



Pic. 5. Francesco Paolo Matticoli, *Sillabario fonico sillabico per la lettura e scrittura contemporanea*, Torino, Tip. Unione dei maestri, 1885 (courtesy Library of Philosophy of the University of Rome “La Sapienza”).

Pic. 6. Giuseppe Menghi, *L'artiere italiano. Parte 1, Sillabario proposto per le scuole serali e festive da Giuseppe Menghi maestro e direttore nelle scuole comunali di Venezia*, Venezia, Tip. G. Favai, 1874 (courtesy Library of Philosophy of the University of Rome “La Sapienza”).

and publishers from smaller areas were used, namely Bitonto (Stab. Tip. Garofalo), Trani (Tip. Ascanio Laghezza), Taranto (Natale) and Ostuni (Ennio G. Tamborino); in Molise, the three elementary schoolmasters who wrote primers to be used in class turned to the typographic company of the brothers Colitti e and to Jamiceli both located in Campobasso; in Basilicata the three titles were produced by local printshops in Potenza (Stab. Tip. A. Pomarici), in Lagonegro (Tip. del Sirino) and in Rionero (Tip. Torquato Ercolani); in Calabria the only recorded title was printed by a typography in Catanzaro; finally in the other Island, Sardinia, the four primers were issued by four different printing companies (Dessi, Gallizzi, Commercio and Timon).

During the last decades of the century the tendency to see mainly teachers, inspectors and school principals engaged in the writing primers and reading exercise booklets is reinforced, «along with some person of letters who has not disdained to stoop to such humble work»⁵⁷. It is more common to find

⁵⁷ *Relazione della Commissione Centrale per i libri di testo a S.E. il Ministro della PI, «BUMPI», vol. II, n. 43, 15 ottobre 1894, pp. 18.*

elementary school teachers, a trend that began to assert since the mid 1870s, fostered by the pedagogical and magisterial conferences that involved the more experienced representatives of the teaching class⁵⁸; whether they were publicists for teachers' journals, promoters for teachers' associations, or supporters of a more secular type of school. Among them, for example, Natale Inverardi, the schoolmaster of elementary schools in Rome, author of a successful primer that had wide circulation in the capital city and beyond. He was in close contact with Emanuele Celesia the geneovese university professor, and from the very beginning of his experience in the new city Inverardi proved to have «intelligence and zeal» and was called to give a «very effective» contribution. He was a teacher that several councilors contacted for his expertise in teaching, both for the study of regulations and programs, and also for improving the culture of other schoolmasters and to give consistency in teaching, entrusting him with the task of giving lectures and lessons to the other schoolteachers. In 1871 he already was highly regarded by the commissioner of education and by the inspectors and gave lessons in pedagogy to schoolmasters from Rome, commissioned by the councilor, and public lectures on rights and duties. On the 30th of March 1872, he was appointed director and in 1890 he won the national competition as an inspector. In 1872 he was the president of the «Società fra gli insegnanti di Roma» (Teachers' Society of Rome) and at the end of 1879 he was one of the promoters that first attempted to create an organization on a national basis among elementary teachers, *Associazione Nazionale fra gl'insegnanti primari* (the National Association of primary school teachers)⁵⁹. In the second half of the 1870s, Celesia was greatly appreciated by Michele Coppio. Even Inverardi's commitment as a teacher was joined to the other, collateral role, as a publicist. The specific interest of the Piedmontese schoolteachers was oriented to the production of textbooks for early elementary grades. Prior to his transfer to Rome, he had published the text *Lezioni di grammatica italiana* (Lessons of Italian grammar), which was approved by the school board in Genoa in 1869; and later another text entitled *Primi esercizi del leggere e dello scrivere* (First exercises of reading and writing) approved by 29 school boards supported by a writing course in 8 notebooks, an award-winning edition at the Paris Exposition in 1878⁶⁰.

⁵⁸ G. Gonzi, *Sillabario e primo libro di lettura proposto alle scuole elementari d'Italia dall'insegnante primario toscano Giovanni Gonzi*, Siena, Tip. di A. Moschini, 1874; *Sillabario completo facile e dilettevole per l'insegnamento contemporaneo della lettura e della scrittura compilato dal maestro Emidio Consorti*, Fermo, Tipografia Bacher, 1874; *Sillabario graduato, per Nicola Martiri*, Napoli, Stabilimento Tipografico dell'Unione, 1875.

⁵⁹ *In memoria del Prof. Cav. Natale Inverardi. Ispettore delle scuole di Roma*, Roma, Tipografia Capitolina, Domenico Battarelli, 1912; for Inverardi's role as a promoter of associations consult A. Barausse, *Primary school teachers' associations in Italy from unification to late nineteenth century: origin and development between processes of professionalization and nationalization*, «History of Education & Children's Literature», vol. IX, n. 1, 2014, pp. 709-754.

⁶⁰ For a critical evaluation on Invenardi's primer, consult *Sul libro del sig. Inverardi per*

At this stage, further development in the production of primers directed towards ensuring the simultaneous teaching was documented, an example is given by the one written by Giuseppe Celli, awarded with the medal at the Italian General Exhibition which took place in Turin in 1884, adopted in the municipal schools in Milan and that in 1886 was already in its ninth edition⁶¹. This booklet introduced greater attention to the positioning in the text of the vowels with variable lengths, as if to take into account the visual dimension.

What affected the further development in the production of manuals was first the curriculum reform desired by the Minister Boselli who, as is well known, in 1888 launched the measure prepared by the committee chaired by Aristide Gabelli inspired by the principles of positivism. The programs for language teaching came back, among other things, to emphasize the need to correct the flaws in pronunciation, the importance of dictation and memory exercises, but in the context of an activity that should take place within the everyday experience of the child. He provided reading and simultaneous writing exercises and objective teaching through the explanation of the names of things that were in the classroom and in the home environment⁶². Later in 1894 it was the minister Baccelli who intervened again in reducing what Boselli had prescribed⁶³. As a direct result of these measures, Baccelli wanted to restore the work of the Central Commission that intended to monitor on the production of textbooks⁶⁴. The committee chaired by Giuseppe Chiarini examined, in April 1894, 193 books and 66 reading exercise booklets. Subsequently, he analyzed 94 products among the new primers submitted after September 1894 and those resubmitted with more or less radical amendments. Posters and other similar instruments for simultaneous reading were not included among them. This choice stemmed from the findings in the Instructions introducing the Programs of 1894, which blamed «the bad habit still found in some schools where pupils read posters or primers in chorus, so this exercise for many becomes a pretence,

insegnare a leggere e scrivere. Poche parole di Augusto Mauro, Roma, Tipografia milanese 1876. Archivio Storico Capitolino, Ripartizione VI-Posizioni matricolari degli insegnanti (1871-1934), b. 26, fasc. 344 (*Inverardi Natale*).

⁶¹ *Per imparare la lettura contemporaneamente alla scrittura secondo il sistema fonico compilato da Giuseppe Celli*, awarded with a medal at the Italian general Exhibition that took place in Torino in 1884, in Milano, at the publishing house, 1886.

⁶² Reform program for elementary schools issued with R.D. 5 settembre 1888, n. 5724, «Bollettino Ufficiale del Ministero dell'Istruzione Pubblica» [from now on «BUMPI»], 1888, pp. 492-512, citations from pp. 507-508.

⁶³ Reform program for elementary schools issued with R.D. 29 novembre 1894, n. 525, «BUMPI», 1894, pp. 1888-1916.

⁶⁴ For information on the Commission's work during the period between 1894 and 1897, also consult E. Tabacchi, «*Secondo i naturali confini della libertà degli insegnanti*». *Forme di censura e controllo nell'esperienza della seconda Commissione centrale per l'esame dei libri di testo*, «History of Education & Children's Literature», vol. VIII, n. 2, 2013, pp. 239-258.

and for all a habit of reading with pauses or vicious cadences that hardly cease when moving to upper classes»⁶⁵.

The Chiarini committee wanted to also examine 87 reading exercise booklets that were part of the primers, by including in this category, even those «first volumes of complete reading courses and all the other books which, without being explicitly entitled in this way, seemed to have the character and the intent to supplement the primer, not only because it provided the necessary exercises of current reading, but also for its simplicity and ease of form and content at the children's level. Considering children's age and their small ideas, they should not and cannot search or acquire new and difficult concepts which they do not need and cannot understand in books and in schools, but simply and mainly use books for the habit of reading»⁶⁶. In the more general framework of an unsatisfactory production («a clutter of books badly made, ill-conceived and written even worse») he turned his preference to those texts that had chosen the phonetic syllabic method deemed most appropriate in fast learning; and reading exercise booklets which better ensured the principle of gradualness and educational content. At the end, there were only 44 primers and 27 reading exercise booklets that resulted approved.

Finally in 1898 a new report was presented; it examined 169 new editions of primers⁶⁷. Among the authors who were approved, new figures appear: schoolmasters and schoolmistresses, heads of normal schools, school publicists, writers such as F. Agabiti, I. Baccini, V. Bagli, M. Bargoni, R. Barberis C. Ottini, G. Barengo, C. Benedicti, E. Berni, L. Bertelli, L. Bettini, A. Cavezzali, V. Caroli, S. Corti, F. De Grazia, P.P. Fongoli, E. Pantaleo, S. Raccuglia, M. Zaglia, etc. Many of them had adopted a careful approach which meant writing primers according to the pedagogical principles of positivism in order to renew language teaching. How one of these, Antonio Ambrosini, recalled:

today, instead, the school, while teaching how to read and write, sharpens the senses, opens the mind, snubs children's language, and puts in place all their bodily and spiritual powers; so that language teaching becomes fresh, lively and varied, and becomes greatly amusing to children⁶⁸.

⁶⁵ *Relazione della Commissione Centrale a S.E. il Ministro della Pubblica Istruzione*, «BUMPI», vol. II, n. 35, 1895, pp. 1430 (Report of the Central Commission to S.E. Ministry of Education).

⁶⁶ *Relazione della Commissione Centrale a S.E. il Ministro della Pubblica Istruzione*, cit. pp. 1428-1460 (Report of the Central Commission to S.E. Ministry of Education).

⁶⁷ *Relazione della Commissione Centrale per i libri di testo a S.E. il Ministro della Pubblica Istruzione*, «BUMPI», vol. II, n. 38, 1897, pp. 1458-1509 (Report of the Central Commission for textbooks to S.E. Ministry of Education).

⁶⁸ A. Ambrosini, *Insegnamento della lingua nel primo anno di scuola un speciale relazione all'insegnamento della lettura secondo il metodo delle parole normali*, Firenze, R. Bemporad, 1913, 2^a ed., p. 7.

4. *Primers between language, moral education, civil ethics and national identity*

From a linguistic point of view, primers do not deviate from the traditional forms of Italian literary in the lexicon and morphosyntax. However, the examination of the reading exercise booklets allows to determine, as recently reported, the existence of a «certain polymorphism»⁶⁹. However, this is not the moment to present the technical aspects of a linguistic nature. A more detailed reasoning must be done, however, on the vocabulary used in primers. Reference to everyday life prevails. The nomenclature used in primers, being designed for an illiterate public, refers to rather simple vocabulary, where references to abstract terms are not frequent. The most widely used lexical component reflects the Italian socio-economic context typical of that time. So what is commonly expressed are terms that recall the rural reality and peasant's life. In many cases, this dimension is also made explicit in the titles, especially in the reading exercise booklet which is part of the primer. Children are often introduced to the syllabification using the nomenclature connected directly with the work that takes place in the fields (La zap-pa è un ar-ne-se as--sai u-ti-le al--l'a-gri-col-tu-ra. La zan-go-la e il bat-ti-bur-ro. Il vi-gna-iuo-lo in-trec-cia i tra-lci del-la vi-te. Grap-po-lo di u-va mo-sca-rel-la)⁷⁰. The lack of industrial development is not conducive to the use of a more articulated terminology, except in very general terms («Il traffico e l'industria fanno la ricchezza dei popoli»)⁷¹. The identity of a rural and farming community is the foundation of the new national reality. A proposition from Massimiliano Barbieri's primer, inserted as an exercise for pupils states:

Little youngsters, start from this tender age to study and enrich your talent of useful knowledge. Once you have grown up, what has to be your primary concern is to advance the fine art of agriculture. The Italian people must devote themselves in a special way to cultivate their lands. A well-cultivated land does not cease to produce its fruit in large quantity: it is from this that we must gain immense wealth. It's actually the climate of our beautiful peninsula that contributes to the fertility of our soil⁷².

The nomenclature included in the post-unification primers reveals an encyclopedic knowledge, supported by constant religious references. It is

⁶⁹ E. De Roberto, *Scuola o scola? Monolinguisimo, polimorfia e variazione nei sillabari postunitari*, in *La lingua italiana. Storia, strutture, testi*, Vol. VI, 2011, pp. 161-174.

⁷⁰ «The hoe is a very useful tool for agriculture. The churn and the skimmer. The winemaker weaves the branches of the vine. Bunch of Moscarella grapes», in *Sillabario graduato ad uso delle scuole elementari compilato dal can. Vago*, Napoli, Morano, 1870, 5 ed. p. 24.

⁷¹ «Traffic and industry are the wealth of nations», *ibid*.

⁷² M.[assimiliano] Barbieri, *Nuovo sillabario figurato ossia nuovo metodo fonico sillabico: ornato di oltre 200 figure atte a promuovere l'attenzione dei fanciulli ed aiutare l'intelligenza nell'apprendere la lettura con maggiore difficoltà ed in brevissimo tempo*, Bologna, Stab. Tip. Monti, presso l'autore, 1872, p. 44.

common to find primers that repeat in the same way the nomenclature structure and the breakdown suggested in the primers by Thouar, Scavia or Troya⁷³, who – on the basic pattern set up by Alessandro Parravicini – often represent a model for many other primers: like Vago's, in which you can find groups of words that relate to plant foods, animal foods, beverages («In Inghilterra si fa grande uso della birra, in Italia delle limonate»: “In England they drink a lot of beer, in Italy lemonade”) men's clothing, buildings, household items, cellar tools, «school stationary»⁷⁴; or like Celli's, in which the nomenclature includes the sky, the earth, the air, the water, the time, the plants, the animals, man, school⁷⁵. Even in the primer «*Il piccolo sillabario delle scuole rurali con i primi esercizi di lettura corrente*» (The little primer for rural schools with the first current reading exercises) by Carlo Mottura and Giovanni Parato flowers, plants, animals are constantly mentioned in the few pages of this booklet, along with maxims, moral fables and fairy tales.

Within the liberal elites, albeit with different nuances, what is deeply rooted is the conception which depicts the Italian social structure characterized by the presence of two distinct peoples; from a civilizing process that favors their integration into the new national society supported by a real civil religion⁷⁶. The texts contained in the primers or reading exercise booklets highlight those virtues which are consistent with the moral and civil perspective pursued by liberal elites. Through the primers, what is being expressed and conveyed, in fact, are also those educational contents that are based on a well-defined ethical conception of human life and that precede and support the training of Italians and of its national identity. These concepts were specified by the schoolmaster Azzi with these words:

The capable teacher will immediately feel the necessity to explain the words, their pairing, and propositions, allowing their students to exercise in the nomenclature, developing their organs of speech, and giving them the opportunity to enrich their understanding of that knowledge which is essential to civilized life⁷⁷.

Within this perspective, what is found in primers is the constant use of proverbs or maxims, tales most of the times with animals as the protagonists in order to recall the moral duties and examples of the vices and virtues; for

⁷³ *Compimento del sillabario e primi esercizi graduati di lettura corrente per V. Troya*, cit.

⁷⁴ G. Vago, *Primo libro di lettura e nomenclatura a compimento del sillabario*, Napoli, Morano, 1870, 4^a ed., pp. 8-9.

⁷⁵ G. Celli, *Per imparare la lettura contemporaneamente alla scrittura secondo il sistema fonico compilato da Giuseppe Celli*, Milano, Presso l'autore, 1886.

⁷⁶ For information on these aspects, refer to the views of G. Chiosso, *Nazionalità ed educazione degli italiani nel secondo Ottocento*, «Pedagogia e Vita», n. 4, 48, 1987, pp. 421-440; R. Sani, *Refining the masses to build the Nation. National schooling and education in the first four decades post-unification*, «History of Education & Children's Literature», vol. VII, n. 2, 2012, pp. 79-96.

⁷⁷ *Metodo per insegnare contemporaneamente nomenclatura lettura scrittura e retta pronunzia proposto da Carlo Azzi e Scipione Benedetti insegnanti in Firenze*, Firenze, Tip. Faziola e C, 1869, p. 3.

example: «do-ve-re è la-vo-ra-re» (to work is a duty) «I be-vo-ni me-no-ma-no i lo-ro di» (The drunks damage their days) «La ro-ba ru-ba-ta ro-vi-na i ru-ba-to-ri» (Stolen stuff ruins the thieves) «Te-mi Di-o, a-ma-lo, o-no-ra-lo» (Fear God, love Him, honour Him) Di-o ti ri-mu-ne-re-rà⁷⁸ (God will remunerate you). Even in the summaries of the syllabic readings, issues of an ethical nature are frequently found. The internalization of bourgeois values and ethics such as honesty, integrity, sense of honor, respect for the law and authority, rejection of the excesses, acceptance of their status, are the *topoi* of those primers and reading exercise booklets, like the one by Thouar, or Borgogno that, in addition to being a reference model for other authors, especially of reading books⁷⁹, have the objective of introducing the children to what, a reading exercise, defines civil society:

As a schoolboy, I attend school, where I hope to gain a lot of appealing and useful knowledge. But in order to manage my school duties, I need others to provide me with all those things that are necessary. The baker in fact provides me with bread. The tailor makes my clothes: the shoemaker my shoes; the hatter my hats. The laundress launders my clothes. The teacher struggles to educate me. They take care of me and they continuously think about making my life more beautiful! But even these people require one another. The baker cannot make bread, if before the miller had not ground the grain into flour neither would he have been able to grind it, if the farmer had not provided him with grain through hard and long labor. Me too, when I grow up into a man, I will think of making myself useful to others by undertaking a profession in arts or craft. We all need each other; therefore we all have the duty to love, protect and help one another. These needs and these duties are those that make up civil society⁸⁰.

Short stories are constantly used and often feature animals in the presentation of the vices and virtues⁸¹ or to express a strong appeal to values such as the protection of private property, as in the fable of the wolf, the donkey and the gardener:

⁷⁸ C. Mottura, G. Parato, *Il piccolo sillabario delle scuole rurali con i primi esercizi di lettura corrente*, Roma, Firenze, Torino, Milano, G.B. Paravia e Comp., 1876, 10^a ed., pp. 6-7.

⁷⁹ *Sillabario graduale per avviamento alle letture graduali di Pietro Thouar*, Firenze, Felice Paggi, 1877, 6^a ed., in particular pp. 53-64; G. Borgogno, *Primi esercizi graduati di lettura spedita per la prima classe elementare (sezione inferiore) a compimento del sillabario a cura del cav. G. Bergogno*, Torino-Firenze-Milano-Roma, Ditta G.B. Paravia, 1886, 12^a ed.; V. Vergani, M.L. Meacci (edd.), *1800-1945. Rilettura storica dei libri di testo della scuola elementare*, Pisa Pacini, 1984; G. Chiosso, *Libri di scuola e mercato editoriale. Dal primo Ottocento alla Riforma Gentile*, Milano, Franco Angeli 2013.

⁸⁰ Borgogno, *Primi esercizi*, cit., pp. 28-29.

⁸¹ «Favoletta. La lo-do-la e la vi-pe-ra. La lo-do-la vo-le-va be-re a u-na pa-lu-de. Vi-de u-na vi-pe-ra ve-le-nò-sa. La lò-do-la vo-lo' su-bi-to vi-a. Mo-ra-li-tà. E-vi-tà-te i ma-li o-pe-ra-to-ri» (Tale. The skylark and the viper. The skylark wanted to drink in a swamp. He saw a poisonous viper. The lark flew away immediately. Morality. Avoid the evil operators), C. Mottura and G. Parato, *Il piccolo sillabario delle scuole rurali con i primi esercizi di lettura corrente*, Roma, Firenze, Torino, Milano, G.B. Paravia e Comp., 1876, 10^a ed., p. 6.

«Un lu-po un dì si vo-lè-va di-vo-rà-re un à-si-no. Er-mè-te or-to-là-no il vi-de. Su-bi-to dà di ma-no ad un pa-lo, lo al-za, lo in-vida a ve-ni-re. Il lu-po e-ra af-fa-mà-to; ep-pù-re se ne an-dò. Mo-ra-li-tà. Ba-da a te ed al-la ro-ba tu-a; si-i ri-so-lu-to, ed e-vi-ta ti-mi-di-tà»⁸².

(A wolf one day wanted to devour a donkey. The gardener saw him. He immediately picked up a pole, lifting it, he invited the wolf to come. The wolf was hungry; yet he left. Morality. Take care of yourself and your stuff; be determined and avoid being shy).

Just as it is equally obvious the recurring use of pedagogy through examples, often associated with the negative fate of those who did not follow the precept «Chi non ha un me-stie-re e va a spas-so, s' av-via al-l'os-pe-da-le pas-so pas-so» (Whoever does not have a job and goes for a walk, starts going to the hospital, step by step)⁸³.

One of the most recurring themes, both in the vocabulary and in the simple clauses suggested to children, is hard work, because together with obedience, temperance and generosity, is among the greatest acclaims. («We were born to work. Idleness is a vice. Idleness and vices bring to misery. The haughty man shall be humbled. Maurizio be true. Good life brings us joy. If you want to live long, keep an orderly and pleasant life»). And even: «Misery comes after an idle life. The stuff which has been stolen lasts a little and ruins the robber. Give the worker the price of his labors. The oppressed find their reward in heaven [...]»⁸⁴. Gradually, over the years, the themes of hard work, such as «Get used to work early in life», grow steadily in primers anticipating the topoi of selfhelpism that will be even more present in the primers produced in the 1880s⁸⁵.

Another recurring duty invoked frequently in primers is that of «cleanliness» through the recourse to the rules and the principles of hygiene. The use of this type of lexicon (chamber pot, washstand, table) which refer to this aspect is frequent or even expressions like:

«Le ma-ni de-vo-no es-se-re te-nu-te pu-li-te. Il mo-to mo-de-ra-to fa be-ne. Mi la-ve-rò le ma-ni e il vi-so ap-pe-na le-va-to. L'a-bi-to rap-pez-za-to non fa on-ta, co-me un a-bi-to mac-chi-ato»⁸⁶.

(«Hands must be kept clean. Moderate movement is good. I will wash my hands and my face as soon as I get up. It is a shame to wear patched clothes just like stained clothes»).

Among the duties that recur is «education», that is almost always presented as a way to ensure progress and civilization as emerges from this brief passage expressed in the form of direct and immediate dialogue:

⁸² Borgogno, *Primi esercizi*, cit.

⁸³ G. Scavia, *Sillabario per le scuole degli adulti*, Torino, Tommaso Vaccarino.

⁸⁴ *Sillabario graduato ad uso delle scuole elementari compilato dal can. Vago*, cit., p. 28.

⁸⁵ M. Berra, *L'etica del lavoro nella cultura italiana dalla unità a Giolitti*, Milano, Franco Angeli, 1981; A. Chemello, *La biblioteca del buon operaio. Romanzi e precetti per il popolo nell'Italia unita*, Milano, Unicopli, 1991.

⁸⁶ *Sillabario graduato ad uso delle scuole elementari compilato dal can. Vago*, cit., p. 8.

How glad I am to be going to school, Giulietto repeated the day before yesterday to his dear mother. In just nine months I have learnt how to read properly, to write under dictation, to know numbers, to do a sum and also to talk a little bit without saying so many blunders. Don't you think dear mom, that I have been able to use my time well and to draw benefits from all those things that my good schoolmaster has taught me? Yes, his mom replied, kissing him tenderly, you've been really good, keep doing this and there will be the day when you will be useful to yourself and to others⁸⁷.

The enhancement of schooling processes also passes through the admiration of the figure of the schoolteacher and the denigration of the idle pupil⁸⁸ or the presentation of the negative exemplum in the form of a short story, such as «The disobedient child», in which Silvio is a young boy that «One morning disobeys his parents' and teacher's expectations, and instead of going to school he joins a group of rascals and goes to play around, along a river bank, instead of going to school». After inserting elements of geographic nomenclature, the author concluded the story: «What happened to Silvio? – He began to pick up some flowers along the river bank; but at one point, he pushed himself over too much, fell in the waters and drowned miserably in the current of the river»⁸⁹.

The dramatic conclusion of the short story, through the use of the «pedagogy of example», had the utility to remain etched in the mind of the child, who in this case was prompted to choose going to school rather than being out on the streets that are full of temptation and dangers⁹⁰. Therefore, it was convenient for the child to listen to the parents' and the teacher's good advice in order to be a good boy and a good citizen, and this aim is constantly indicated in primers, such as Silvestro Bini's:

Chi a ma chia mar si uo mo ci vi le ri spet ta i mo nu men ti e non li de tur pa con mo ta od al tre ma te rie e ne mu ti la qual che par te, co me pu re ri spet ta tut to quel lo che di u ti le ci han no por ta to i tem pi mo der ni. Co me po trà chia mar si ci vi le e gen ti le quel l'uo mo o quel bam bi no che ad o gni pa ro la in giu ria Dio ed il buon co stu me! Ci vi le è quel po

⁸⁷ *Per imparare la lettura contemporaneamente alla scrittura secondo il sistema fonico compilato da Giuseppe Celli*, cit., p. 56.

⁸⁸ «Two little peasant children went to school together. Tonino was careful in getting there on time; Diego almost always a slacker, every little while he would stop, and would stay behind to amuse himself now with the wooden disc, now with stones, now with twigs. They had to pass over a bridge above a stream. It had rained heavily the night before, the river was full of water that came down from the mountains. Diego wants to stop and watch the overflow. Tonino urges him to continue walking because the school bell is ringing. He resists but the other takes him lovingly by the hand and leads him almost by force beyond the bridge. They had just walked ten steps on the other side of the bridge that a rock that rolled from the current invested the bridge and ruined it», *Sillabario graduale per avviamento alle letture graduali di Pietro Thouar*, Firenze, Felice Paggi, 1877, 6^a ed., p. 54.

⁸⁹ E. Vecchione, *Il Compimento del sillabario*, Nola, Presso l'Autore, 1887.

⁹⁰ See M. Bacigalupi, P. Fossati, *Da plebe a popolo. L'educazione popolare nei libri di scuola dall'Unità d'Italia alla Repubblica*, Scandicci (Firenze), La Nuova Italia Editrice 1986, p. 36.

po lo che ri spet ta le leg gi di vi ne e u ma ne: quel po po lo poi che cal pe sta e vi li pen de tut to è al di sot to del sel vag gio il qua le è scu sa to dal la sua in vo lon ta ria i gno ran za⁹¹.

(Whoever loves to be called a civilized man respects the monuments and does not disfigure them with mud or other materials, and does not mutilate them somehow, as well as respects all the useful things that modern times have brought. How can anyone be called a civilized and polite man or child if every word is an insult to God and morality! Civil is the person who obeys human and divine laws: the people who trample and then vilify everything is less than below the wild and can only be excused because of his voluntary ignorance).

The poor pages of the first schoolbooks convey an image of an «adult» childhood that the bourgeoisie liberals were trying to impart in the classroom⁹². The good boy is represented as one who knows how to be obedient to his parents⁹³, who is careful of hygiene and has personal care before leaving home to go to school («he smoothes his hair with a comb, removes all the dandruff with another little one, scrubs and washes his face, neck and hands; files his nails properly; removes the mucus from his eyes and earwax from his ears»), he follows an appropriate behavior in going to school in contrast to the model of the urchin, in such a way to be an example for the «spiteful, quarrelsome and noisy» ones; in school, he is respectful to the teacher and careful in maintaining a disciplined behaviour «with his arms folded on the breast, or laying on top of the desk and in front of him. He does not chatter, does not whisper, does not laugh; does not turn his eyes here and there, but looks at his master straight in the eyes»⁹⁴.

What is being recalled are eighteenth-century educational models inspired by the disciplining of behavior based on silence and obedience, respect for authority, with constant references to the stigmatization of children's spontaneous and naive attitudes. The model proposed is the one in which the child knows how to hold back signs of intolerance, he is moderate when playing games, and avoids the dangerous ones with fire, he inspires his behavior to the sense of compassion and charity. («It 's a duty to help the poor [...] Offer charity to the poor. To help the poor is a duty just like it is a duty to work. I will offer charity

⁹¹ Bini, *Sillabario secondo il programma governativo*, cit., p. 28.

⁹² On the idea of childhood in this period see E. Becchi, D. Julia (edd.), *Storia dell'infanzia. Dal settecento ad oggi*, Roma-Bari, Laterza, 1999, pp. 166-167.

⁹³ In the reading exercise booklet by Enrico Vecchione, in the reading on «The Family», it is written: «We owe all our obedience to our mom. Woe to the boy who does not listen to his mother's advice, or that disobeys her with an obstinate and capricious stubbornness. Children, we therefore shall all love our mother, and we will live happily for a lifetime. «or, further on»: «How sweet is the father's voice! (.) We must study hard to correspond to his care; we must work for him to allow him to rest in old age and assist him with our help». The value of the exhortation is made, in these two cases, in an even more effective way by using the imperative formula placed at the head line (in the first example by «Children» to «lifetime» in the second «We» to «help»): an expressed formula which was a custom in use in all the reading texts which were designed to give a positive or negative «exemple» to pupils, E. Vecchione, *Il Compimento del sillabario*, Nola, Presso l'autore, 1887.

⁹⁴ Vago, *Primo libro di lettura e nomenclatura a compimento del sillabario*, cit., pp. 11-12.

to the poor, and help those who are miserable»). A child who knows how to appreciate the benefits of school because he understands it is a useful learning place of «valuable knowledge» through the observation of things, as well as knowledge of the «infinite power, wisdom and goodness of God” and “makes us capable of speaking the beautiful Italian language, and unites us and tightens the best bond with all those brothers from different parts of our Italy»⁹⁵.

Even the female profiles, proposed to the girls for imitation, follows the models of good behavior:

Annina is good, wise, and very lovable. She gets up at dawn; does the cleaning, and tidies all her things, she strives to do her duty at the best, and to learn her lesson. Annina has also got a pitiful heart, she helps the poor and she usually gives them a copper coin or a little bread. Her father praises her and she is very proud to be his delight. The good Annina deserves to be imitated by you⁹⁶.

Primers produced in the early post-unification contain, in the lexicon and in the short sentences, many religious references belonging to the Catholic universe. With great frequency it is possible to identify words and phrases, often associated with moral teachings, typical of Catholicism, such as those contained in the primer *Sillabario graduato ad uso delle scuole elementari compilato dal can. Vago*⁹⁷:

Il pa-ra-di-so. Ve-ri-tà, u-ni-tà, Noè, Mo-sè. Sa-rò do-ci-le e co-sì Id-dio mi do-ne-rà il Pa-ra-di-so, e sa-rò fe-li-ce e be-ato. La di-vi-ni-tà è a-do-ra-bi-le, ed io a-do-re-rò Id-dio. Dio be-ne-dì Noè. Id-dio vuo-le da noi a-do-ra-zio-ne, o-no-re e ve-ri-tà. Ub-bi-dia-mo a Dio ed ai su-oi su-pe-ri-ori e sa-re-mo fe-li-ci. La me-mo-ria è do-no di Dio. A-ma-te Dio in ve-ri-tà di pa-ro-le e in pu-ri-tà di o-pe-re. Ub-bi-di-te ai di-vi-ni vo-le-ri⁹⁸.

(Paradise. Truth, unity, Noah, Moses. I'll be docile and so God will give me Heaven, and I will be happy and blessed. The Deity is adorable, and I will worship God. God love of Noah. God wants us to worship, honor and truth. Obey God and to his superiors and we will be happy. Memory is a gift from God. Love God with words of truth and purity of deeds. Obey the divine will).

Even in the example sentences, primers in use during this period, contain fixed themes such as the Sign of the Cross, the Lord's Prayer, the Angelic Salutation, the Creed, the Commandments⁹⁹, the prayer of the children before going to school¹⁰⁰.

⁹⁵ *Ibid.*, p. 17.

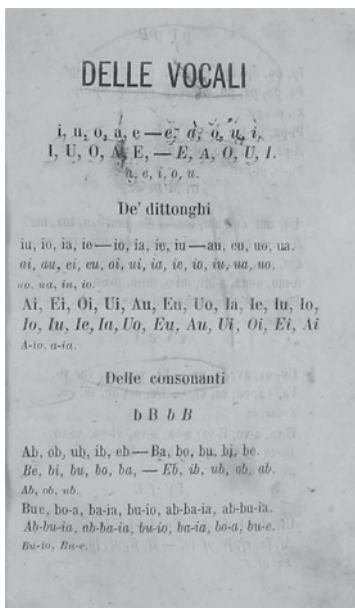
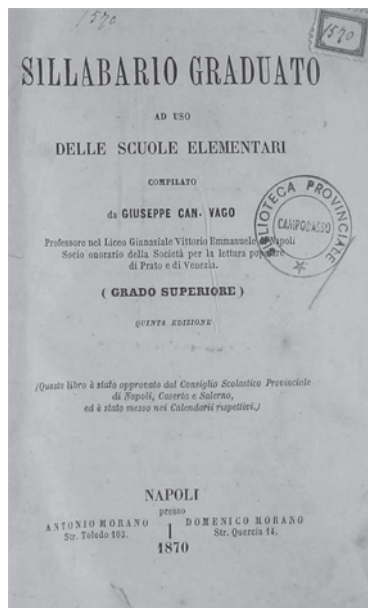
⁹⁶ *Sillabario per imparare la lettura contemporaneamente alla scrittura secondo il sistema fonico compilato da Giuseppe Celli*, cit., p. 31.

⁹⁷ *Sillabario graduato ad uso delle scuole elementari compilato dal can. Vago*, cit., pp. 31-32.

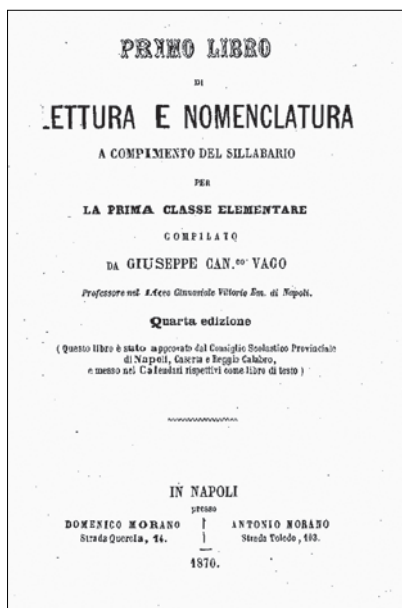
⁹⁸ *Ibid.*, p. 12.

⁹⁹ *Ibid.*, p. 13.

¹⁰⁰ *Primo libro di lettura e nomenclatura a compimento del sillabario per la prima classe elementare compilato da Giuseppe Can.co Vago*, Napoli, Morano, 4^a ed., 1870.



Pics. 7 a-b. Giuseppe Vago, *Sillabario graduato ad uso delle scuole elementari* compilato da Giuseppe can. Vago, Napoli, A. e D. Morano, 5^a ed., 1870, cover and p. 1 (courtesy Provincial Library of Campobasso “P. Albino”).



Pic. 8. Giuseppe Vago, *Primo libro di lettura e nomenclatura a compimento del sillabario per la prima classe elementare*, compilato da Giuseppe can. Vago, Napoli, Domenico e Antonio Morano, 1870 (courtesy Provincial Library of Campobasso “P. Albino”).

In the decades that followed, references to religion will not disappear completely¹⁰¹, but they will be present in veiled tones. However, references that refer more directly to the civic and urban citizens of the future become more important. Thus, for example, the presentation of the consonants is constantly accompanied with examples of city names. Not only the names of the most important capitals, but also of the smaller towns, less frequently used (Orvieto, Osimo, Ortona, Savona, Sora, Susa etc.) almost to emphasize the common national belonging, and underlined through some sentences like «We are Italian and we love Italy which has become free and unified, we expect the love and union of 'good Italian». The appeal to the dimension of nationality is also reported in the titles. Thus, for example, there are different primers such as the one printed in Naples by Giuseppe Ricci¹⁰², by Girolamo Giardini¹⁰³ or the one written by the director of the Normal School in Campobasso, Pierpaolo Fongoli, with the significant title *Sillabario del bambino italiano* (Primer of the Italian child), make explicit reference to the national dimension¹⁰⁴.

In the reading exercises, generally placed as the next section following the presentation of the various forms of hyphenation, what is found in different quantities are references to national identity, from the lure of the various cities that characterize the peninsula (Turin, Venice, Italy,) or the growth of the references to the words such as nation, Savoy, Italy (associated with exile). An example, in this sense, is the recall in Sylvester Bini's primer:

Italy is a peninsula in Europe, the people who live there are called Italians, and the language that is spoken is Italian; the kingdom of Italy is constitutional, and its king is Vittorio Emanuele II. The capital of Italy is Florence; the most famous city of Italy is Rome; Genoa is the largest commercial port in Italy. Naples is the most populous city of Italy. Sicily, Sardinia and Corsica are the largest islands of Italy. The Alps and the sea are the boundaries that God gave to our beloved homeland¹⁰⁵.

¹⁰¹ See as an example the following brief passage in the reading exercise of the primer by Baldassarre Serra: «My dear, yesterday Pierino Renzo came to visit me, he entered the room, and on the table, he saw a little basket of fruit. He reached out to take it, saying no one will see me, but then, a sudden thought, no no, he added, there's God that sees everything, and then what pain will I give my parents and my teacher if I knew nothing of Turin? No, no, and he wanted to escape. But my grandmother Raffaella that was behind the screen, called the good boy, and imbued for having been able to overcome the temptation, gave him the little basket of fruit. And if Renzo had robbed, what would have been of him? Here's a little food for thought. God love me just like your Erminio loves you». B. Serra, *Sillabario per i bambini delle sezioni inferiori urbane e rurali*, Persiceto, Tip. Guerzoni, 1884, p. 8.

¹⁰² G. Ricci, *Nuovo sillabario italiano per adulti e fanciulli*, Napoli, Stamperia Nazionale presso G. Nembro, 1862.

¹⁰³ G. Giardini, *Sillabario italiano completo*, Modena, Vincenzi e Nipoti, 1879; *Sillabario italiano completo con esemplificazione conveniente, ordinato secondo il programma legislativo*, Roma, Accademia dei Lincei, 1886, 19 ed.

¹⁰⁴ P.P. Fongoli, *Sillabario del bambino italiano ammaestrato contemporaneamente nei principii di lettura e scrittura*, Torino, G.B. Paravia, 1885.

¹⁰⁵ Bini, *Sillabario secondo il programma governativo per la sezione inferiore della prima*

Primers insist on the most emotional aspects to represent its nation- even more than the country – which is depicted as a large family with all the professional classes most immediately identifiable by children and connected to those of their small territorial context, rural or urban, (the farmer, the artisan, the merchant):

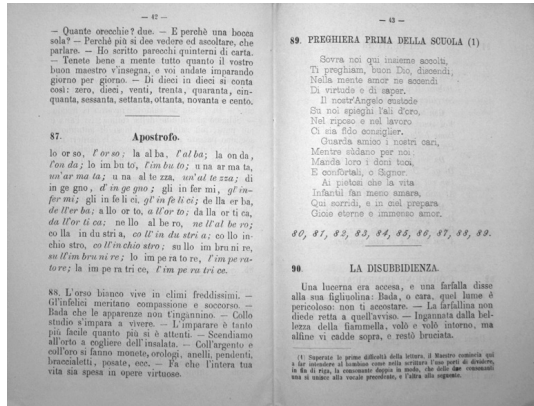
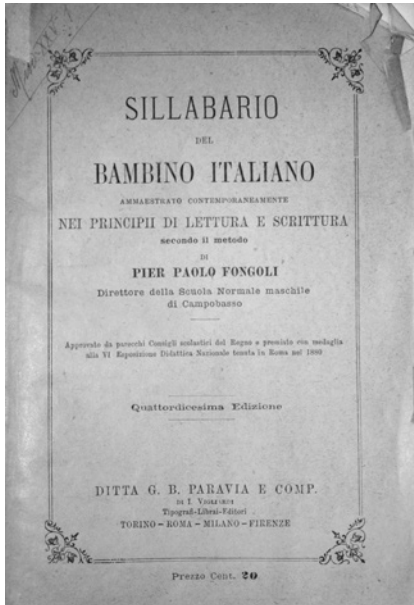
I will love the country where I was born, that is my homeland. My homeland is Italy. The hard-working farmer loves it, and so does the honest merchant, the industrious craftsman. The pious priest loves it and also the hardworking teacher; the soldier loves it and so does the national judge. But most of all the one who loves it most is the fearless soldier who faces the enemy, fights and dies. Whoever is a good son and diligent schoolboy, will one day be a virtuous citizen, who will know how to love and serve his country¹⁰⁶.

This brief excursus on the evolution and circulation of the production of primers has revealed the existence of an increasing number of textbooks which were used for the very first literacy of young Italians, closely linked on the one hand to the uneven development of the typographic and editorial network, that was ready firstly to collect in an unequal manner the increasing demand for textbooks more suitable to the reality and the needs of the child and schools, and secondly also less expensive for the children of the working class and petty bourgeois to whom they were addressed; on the other hand, to the growth of the schooling processes in the peninsula. Moreover, the significant editorial production does not appear to be fully under the control of the bodies responsible for ensuring supervision over the production itself, which sometimes escaped the activism of the authors who often were teachers at local schools. However, primers and reading exercise booklets were the expression of a didactic and pedagogic renewal that, in the course of the forty years of post-unification, implemented new methods to extend pupils' capabilities of reading and writing. At first the leaders of the Catholic spiritualism and, subsequently, the teachers and the professors more careful to follow the proposals of renewal developed by the pedagogical doctrines that were inspired by positivism, were engaged in the production and dissemination of simpler texts geared to promote contemporary learning of reading and writing.

The new primers and exercise reading booklets still coexisted with the more traditional forms of primers that continued to circulate but these, as pointed out in school inspectors' reports, were being adopted less and less in schools, leaving the field to the new texts written by novel authors such as inspectors, school principals, heads of normal schools, primary school teachers', whose biographies for most of them still need to be written. These personalities

classe elementare per le scuole domenicali, serali e rurali d'Italia compilata dal professore Silvestro Bini, cit., p. 26.

¹⁰⁶ *Il piccolo sillabario delle scuole rurali con i primi esercizi di lettura corrente per C.M. e Giovanni Parato, Roma-Firenze-Torino-Milano, G.B. Paravia e C., 1876, 10^a ed., p. 28.*



Pics. 9 a-b. Pier Paolo Fongoli, *Sillabario del bambino italiano ammaestrato contemporaneamente nei principii di lettura e scrittura*, Torino, G.B. Paravia e C., 8^a ed., 1883 (courtesy Library of Philosophy of the University of Rome "La Sapienza").

combined the writing of the first, and sometimes only, books for school pupils with their intention not only to encourage language learning, but also to sustain a cultural process intended to increase adherence to the ethical and civil content expressed by the liberal bourgeoisie class, initially based on ethical and religious principles, and lastly to strengthen progressively the formation of national identity.

Consolidating childhood: children and warpage in Soviet and post-Soviet reading primers 1945-2008¹

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ABSTRACT: The article considers textbooks for elementary schools published in the USSR and in post-Soviet Russia between 1945 and the late 2000s. We calculate the number of times the Soviet-German war of 1941-1945 was mentioned in the texts and visuals of the *abecedaria* and primers published by central and regional presses. We arrive at four periods of various emphases on the subject as a part of a ritual of sorts in the patriotic education system, which presumed the need for a positive upbringing for elementary school children through the use of the subject of war and the praise of the Soviet victory. These four periods are 1945-48, mid-1950s, third quarter of the 1980s, second half of the 2000s. We arrive at the conclusion that the idea of war was included in the subculture of Soviet and post-Soviet childhood as constructed by the authorities and the society.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Primary Education; Military Education; USSR; XX Century.

I remember the Victory Day.

However, it is not connected with the bright colours it deserves. After all, that day marked the end of a bloody massacre. Of all the war years, that year was particularly bad for us, because of a poor potato yield in our vegetable garden. And when I, a seven-year-old boy who didn't yet go to school, heard from my mother that the war was over, I asked, «What did it mean?» Mother said it meant we would live better. I was pleased with that as I saw in it the end to a tormenting hunger.

V.L. Semenov, *Ruminations About the Past*².

¹ The work is supported with grant 13-06-00038 from the Russian Foundation for Humanities (RFH). Translated into English by Tatyana Kovalevskaya.

² V.L. Semenov, *Ruminations About the Past*, Perm', 2006, p. 52.

Introduction

Under the totalitarian regimes of the 20th century, work with children was based, in particular, on including the young generation into the commemorative praxis «of a heroic [Soviet in our case] past»³. Extensive use was made not only of ostensible future passed off as the present, but also of the past which served an educational function via various study books, and was ‘tipped over’ into the future as if ‘logically’ predetermining its course. Study books occupied a significant place among the mechanisms of ‘immersing’ children’s consciousness into the collective memory. Study books showed to the children of the new Soviet world the country’s heroic past as a project of the future hoped for by the little consumers. Starting with the first grade, schoolbooks showed, explained, persuaded, forced to adopt the constructed ideas about the country/Motherland, about the main ‘landmarks’ in its biography. Places and events were marked as «ours» and «enemies», «native» and «alien»⁴. In middle school, hierarchical lists were further elaborated and detailed. And the war of 1941-45 inevitably took one of the central places.

1. Important dates in the children’s world

In his book *The End of Victory Culture: Cold War America and the Disillusioning of a Generation*, Tom Engelhardt uses an apt term «victory culture» to denote the mind-set of a society which experienced a military defeat and lives on hopes of a revanche, on the ideas of ‘triumphalism’, a future victory⁵. However, I believe that the term «victory culture» can be applied to other situations as well. Different historical events in their official triumphalism sometimes do become a centre of politics of the collective memory, they shape a «culture of a once-experienced yet ever-lasting victory». The presence and character of those materials about the War of 1941-45 that have been designating for the Soviet elementary school such an «important for the entire country date» as May 9, demonstrated the hidden, unrepresented directly degree of the

³ See: V. Bezrogov, *Ideal Childhood on the Front Cover: Sovietness, Folkness and Globality in Russian Reading Primer 1980s-2000s*, in A. Skoro Babic et al. (edd.), *Zgodovina otrostva. History of Childhood*, Ljubljana, Zveza zgodovinskih društev Slovenije, 2012, pp. 146-162.

⁴ See: В.Г.Безрогов, *Дети и Родина в современном российском учебнике для начальной школы*, in A. Nekita (ed.), *Берестень*, Альманах, Великий Новгород, Издательство Новгородского университета, 2009; V. Bezrogov, “*If the war comes tomorrow*”: *patriotic education in the Soviet and Post-Soviet primary school*, in M. Bassin, C. Kelly (edd.), *Soviet and Post-Soviet Identities*, Cambridge, CUP, 2012, pp. 113-128.

⁵ T. Engelhardt, *The End of Victory Culture: Cold War America and the Disillusioning of a Generation*, Rev.ed., Amherst, University of Massachusetts Press, 2007, pp. 3-4.

relevance the war had for the Soviet and post-Soviet state educational policy. Children, teachers, and parents are addressed by the official representatives of the adult world of the authorities, laying out the attitude toward the memory of the War to be reproduced year after year, decade after decade, an attitude that has been approved by the Central Committee of the ruling Communist Party.

Until the early 1990s, May 9 in primers and books for reading was included among such dates at the 1917 October revolution, the civil war of 1918-21, «Lenin's memorial dates» (including traditional April admission to the Little Octobrists timed to coincide with Lenin's birthday), Gagarin's space flight. In the post-Soviet period, Victory Day is the principal one, and sometimes the only historical event mentioned in the first 'official' school book. It assumes its own functions as well as the functions of Russia's Independence Day which is celebrated on June 12, but which failed to become Russia's main commemorative holiday. Both in the Soviet and in the post-Soviet times, May 9 serves as the mystical foundation of the subsequent history, of today's life of grandparents, parents, school children themselves, the school, teachers, region, army, and the country as a whole⁶. Victory day «makes a holiday out of», as it were, the special social experience of «mobilization for a heroic feat», endows it with a central meaning, turns it into an eternal value, makes it a justification for failures of the peaceful life, turns it into a standard of a happy life and into a guarantee of a prosperous life, draws along future veterans of other wars, and since childhood, inculcates children from the early age with the idea of their victorious and hence internationally influential country, people, i.e. authorities & government⁷. May 9 turns the story of the war with Germany into the story of an eternal and permanent victory, into the modes of heroism and armament which are victorious and not shameful, and which are qualities viewed as good to have by the society and its best representatives. Thus, a Soviet childhood myth is formed, a myth that passed from one juvenile generation playing «Soviets-against-Germans» to another playing the same game. The subject of War and Victory structured the life of a Soviet child around itself. Soviet children continued to live through the war that was gone, but was also forever young. The children were prepared by the authorities to «defend peace with weapons

⁶ In the post-Soviet time, this situation corresponds to the wide-spread public opinion that May 9 is «the most significant event in the Russian history», the principal, if not the only one 'positive element' of the post-Soviet national mind-set (Л.Гудков, «Память» о войне и массовая идентичность россиян, in М. Gabovich (ed.), *Память о войне 60 лет спустя: Россия, Германия, Европа*, Москва, Новое литературное обозрение, 2005, pp. 89, 94).

⁷ The mythologies of the Victory Day as the ground, the foundation of all the subsequent achievements (= 'conquests') begets the feeling of both 'all-victoriousness', i.e. invincibility of the country/army and of the permanence of its courageous destiny. The Russian school discourse entirely lacks the notion that on the wheel of Fortune, the status of a victor inevitably and ineluctably is followed by the status of the defeated. The children are taught the memory of victory, but they are not taught to remember failures, cowardice, defeats, and to learn from them. In this system of patriotic coordinates, there is no Achilles avenging Patroclus's death on Hector.

in their hands», they were prompted to observe «ordered... power relations» in present through coming to a full realization of their debt to the past⁸.

The Victory Day didn't become a holiday calling toward freedom and social activity among people of various ages who had liberated themselves from the occupants' yoke, or mainly sorrow day for memory of war victims. The Victory Day called both individual and collective consciousness to uncritical loyalty toward the party and the state, it validated strict discipline, solidarity, and obeying orders as the highest form of civic consciousness⁹. One should work for the benefit of the Soviet homeland and patiently bear everyday difficulties since they are the cost of peace. The slogan «Anything but a war!» (*Lish' by ne bylo voiny!*) which was popular in the 1950s-1980s does explain a lot. May 9 was represented to the new generation of Soviet and post-Soviet children as the celebration of sacrificed heroes who had defeated the enemy, as the celebration of duty and heroism, not as a day of mourning. The official Victory Day, laying claims for the function of «the authorities' principal justification», its «ideological foundation»¹⁰, dictated the need for a heroic sacrifice for the state in the times of peace as well («our ancestors persevered, should we fail in our perseverance?»). Soviet children grew up listening to victory marches broadcast on the radio, and couldn't imagine themselves without the military past.

2. Sources and methods

Implicit ideas, images, stereotypes present in study books can be made explicit if we turn to such study books where the absence/presence of such ideas etc. is not a conscious or, at least, primary concern of the authors and teachers¹¹. Such study books are, in particular, abecedaria, primers, elementary school anthologies. Their authors-compilers include, whether of their own volition or upon the prompting of editors, methodology specialists, reviewers, regulations, and discussion practices, words and short or not so short texts and illustrations linked to understanding of certain 'inevitable moments' from the past. In the post-war Soviet society, the central place in such texts and illustrations designed

⁸ Cf. S. Cohan, *Masked Men. Masculinity and the Movies of the Fifties*, Bloomington, Indiana UP, 1997, p. XVIII; A. Prohorov, *Inherited Discourse Stalinist Tropes in Thaw Culture*, Diss., University of Pittsburgh, 2002, p. 67.

⁹ The term was used by Margaret Elizabeth Peacock (*Contested Innocence: Images of the Child in the Cold War*, Diss., The University of Texas at Austin, 2008, p. 29).

¹⁰ Н.П. Соколов, *Школьный учебник как «вместилище» принятой в обществе исторической позиции*, «Горбачевские чтения», вып. 5, 2007, pp. 128-131.

¹¹ In 1945-1991 schoolbooks whose 'duty' was to tell about the times past were *Stories from the History of the USSR* for the 3rd and 4th grades. Since 1991 and until today, this function is performed by the historical sections of the 'General Studies' course (grades 1-4).

for children, their parents and teachers was taken by the militarist problematics ‘wrapped up’ in the subject of the war of 1941-1945¹².

In order to trace at least partially the role and place of the military theme in the Soviet and Russian childhood, we have analysed *abecedaria* and primers published by central and regional publishing houses between 1945 and 2008. These study books, being present at home and in school, influenced not only children, but also adults working with those books, acting as propagandists or witnessing the official attitude of the adult world to the memory of the War, of those adults who guided both children’s and adults’ attitude to the military past and its image in the post-war political and cultural discourse¹³. Primers taught to read the past, they taught the rules children had to follow when addressing historical memory.

When studying this corpus of schoolbooks, I marked visual or verbal presence of the war themes as ‘mentionings’. Mentionings are divided into ‘direct’ ones, unquestionably connected with the Great Patriotic war, and ‘indirect’ ones which introduce war-related subjects, but may concern both the war of 1941-1945 and other military operations conducted by the USSR and the Russian Federation. References to older, pre-USSR periods (Kievan Rus, Peter I, the war with Napoleon, the civil war, etc.) weren’t counted.

Implanted memory discourse: the Soviet version

Primers published in the first post-war years mention the War most frequently. For instance, S.P. Redozubov’s standard *Primers* of 1945-1946 have 21 mentionings of the war theme each, of which 8 might be counted as referring to the war of 1941-1945¹⁴. 1945 primer for village schools (by the same author) is also sufficiently ‘militarized’: 14 mentionings of war, of them 9 are direct¹⁵. Not all regional publications followed this paradigm. For instance,

¹² N. Tumarkin, *The Living and The Dead: The Rise and Fall of the Cult of World War II in Russia*, New York, Basic Books, 1994.

¹³ Contents and visuals of a schoolbook take a while to prepare, and therefore their ideas become accessible to the target audiences only afterwards. We use the term ‘propagandist school book’ to denote a publication which openly (explicitly) presents school children and adults with a particular subject, and we use the term ‘witness school book’ to denote a publication where a particular subject is implicit. I am grateful to the K.D. Ushinsky Academic Pedagogical Library and to the Academic Library of Georg Eckert Institute for providing me with an opportunity to study their school book collections. I am also grateful to Yu. Čibuls, author and collector of primers, for his kindly assistance in my research into the history of school books.

¹⁴ С.П. Редозубов, *Букварь для обучения неграмотных чтению и письму*, Москва, Учпедгиз, 1945, 96с. Approved for publication on 19.VI.1945; Idem, *Букварь для обучения чтению и письму*, Изд. 2е, Москва, Учпедгиз, 1946, 96с. Approved for publication on 29.III.1946. Henceforth the date which follows the number of pages indicates the date of the school book’s approval for publication.

¹⁵ С.П. Редозубов, *Букварь для школ сельской молодежи*, Москва, Учпедгиз, 1945, 128 с., 25.XII. 1945.

N.A. Kostin's primer published in Leningrad demonstrates staunch denial of the military themes, they are not allowed into the primers published in 1946-1948. These primers have between 2 and 5 general mentionings, of which 1 is sometimes direct, and sometimes (1948) it is entirely absent¹⁶.

The late 1940s show a general decline in the militaristic spirit in the primers. The Cold war ideology has Soviet children pay particular attention to the educational, cultural, civil, economic rivalry with capitalist countries which in America or in Europe don't care at all about what kind of children are growing up there (inclined toward violence, hooliganism, individualism). In the 1949 edition of his *Primer*, S.P. Redozubov gives only 4 general mentionings, of which only two refer directly to the war of 1941-45¹⁷. Lesser frequency of mentionings becomes more or less universal over just a few years. The military theme 'peaks' again in primers and abecedaria only in the mid-1950s. Most likely, it happened because of a rather modestly celebrated first 'milestone anniversary' of the Victory Day (May 9 was a state holiday in 1945-1947, and it regained this status only in 1965¹⁸). 1951-54 primers demonstrate a gradual return of the military themes¹⁹. A.I. Voskresenskaya's 1955 *Primer* is one of the most 'militarized' publications: 9 mentionings, 2 direct²⁰. Of course, this figure is significantly smaller than the figures of 1945-48, but with the Victory Day not being a state holiday it looks quite impressive, particularly when compared to a much smaller number of mentionings of war in the schoolbooks of the late 1940s-early 1950s. The same primer marks the appearance of the «turn-

¹⁶ Н.А. Костин, *Букварь*, Leningrad, Учпедгиз, 1946, 96с., 21.VIII.1946. 2 mentionings, 1 direct. Idem., *Букварь*, Изд.2е, перераб. и доп., Leningrad, Учпедгиз, 1947, 128с., 23.VII.1947. 5 mentionings, 1 direct. Idem., *Букварь*, Изд.3е, перераб. и доп., Leningrad, Учпедгиз, 1948, 96с., 1.III.1948. 3 mentionings, 0 direct.

¹⁷ С.П. Редозубов, *Букварь для обучения чтению и письму*, Изд. 4е, перераб., Москва, Учпедгиз, 1949, 96с., 14.II.1949.

¹⁸ We do not consider the overall history of the holiday and its influence on the processes of remembering childhood. See Tumarkin, *The Living and The Dead: The Rise and Fall of the Cult of World War II in Russia*, cit. What is particularly worth noting is the official transition from the central myth of the October revolution and the foundation of the USSR as the foundations of the Soviet identity to the central myth of the Victory in the War as the foundations of the post-Soviet identity and the national cohesion (at least since 1995 when celebrating the Victory Day was again held in a grand style) – despite the fact that culture was looking at any war as a 'crisis point in any identity' (И. Кукулин, *Регулирование боли (Предварительные заметки о трансформации травматического опыта Великой Отечественной / Второй мировой войны в русской литературе 1940-1970-х годов)*, in М. Gabovich (ed.), *Память о войне 60 лет спустя*, cit., p. 651).

¹⁹ А.И. Воскресенская, *Букварь*, Издание 8е, Москва, Учпедгиз, 1951, 96с., 27.XII.1950. 5 mentionings, 0 direct. Idem., *Букварь*, Издание 11е, Москва, Учпедгиз, 1954, 95с., 19.X.1953. 1 indirect mentioning. С.П. Редозубов, *Букварь*, Изд. 7е, Москва, Учпедгиз, 1952, 96с., 12.X.1951. 6 mentionings, 2 direct. А.С. Бедняков, П.И. Чевалков, *Букварь*, Учебник русского языка для 1 класса горно-алтайских школ, Горно-Алтайск, Кн.изд-во, 1954, 188с., 30.IV.1954. 3 mentionings, 1 direct. Н.И. Сивко, *Букварь*, Изд. 10е, испр. и доп., Минск, Учпедгиз БССР, 1954 (бел.яз), 128 с., 31.XII.1953. 4 mentionings, 2 direct.

²⁰ А.И.Воскресенская, *Букварь*, Издание 12е, Москва, Учпедгиз, 1955, 95с.

around-slogan» «We don't want war» which used the declared striving for peace to cover up the militarized post-war economy; in its various incarnations, this slogan will become a staple of primers from now on (as, for instance, in the formula «mother, Moscow, peace» etc.).

The year 1965 saw both the resurrection of the Victory Day as a state holiday and the publication of the most peaceable primers since the late 1940s-early 1950s. We believe it to be a holdover from the previous, less militarized paradigm. In 1965, S.P. Redozubov's *Primer* went through its 11th edition, and it has only two mentionings of war, of them only one direct. Given the utopian beliefs in the future of the Soviet social system²¹, which were widespread in the 1950s-1960s, the schoolbook set peaceable priorities for children (kolkhozes, working at factories, etc.)²². The late 1960s and the 1970s were again characterized by a gradual rise of 'militarization', often achieved not through frequent mentionings of war, but through a very long and detailed 'military text' included in the school book, through heightened emotionality (aimed at adults who were supposed to broadcast it to children) etc. 1970s primer had only three mentionings of war, but one of them is a long (it takes up a whole page) story about a war, which made it to the primer for the first time since 1945-1946²³.

The military subject gains in prominence throughout the 1980s and peaks in the schoolbooks of 1984-1989 which have 8-9 mentionings of war. For the first time we encounter the slogan «Nobody is forgotten! Nothing is forgotten!», the theme of war veterans, medical aid dogs in the Great Patriotic war, the image of «my grandfather, a war veteran». This image now appears in the schoolbooks, and he's usually a sniper. The mentionings also include the stories of the defense

²¹ Despite the Cold war, certain temporary prosperity allowed to depict children's life in the USSR in the 1950s-60s as the brightest and closest to reaching the 'bright communist future'. 'Dangers' of capitalism and the inculcated readiness for active, pre-emptive defence against it only served to highlight the prospects of a domestic utopia. The Soviet society began to convince itself of being capable to create a happy childhood for its children (in the Soviet understanding of happiness, of course). One didn't need to fear sudden ideological dangers lurking around every corner in the pre-war years. An ideal childhood that was creative, both taught creativity and at the same time was utterly controllable and governable was supposed to beget an ideal Soviet citizen, ready to fight for the Soviet social system in the Cold war, when confrontation occurred along other frontlines, unrelated to open warfare. See, for example: S. Reid, *Khrushchev's Children's Paradise: The Pioneer Palace, Moscow, 1958-1962*, in D. Crowley, S.E. Reid (edd.), *Socialist Spaces. Sites of Everyday Life in the Eastern Bloc*, Oxford, Berg, 2002, pp. 141-179.

²² С.П. Редозубов и др., *Букварь*, Изд. 11е, Москва, Учпедгиз, 1965.

²³ First graders are being told about the war by their fathers. They tell about being at war, about being wounded. In the 1970s, a war veteran with a seven-year-old son must have been a fairly rare phenomenon, but the authors of the primer seem to be oblivious of the anachronism: Архангельская Н. и др. *Букварь*. Изд. 14е. М.: Просвещение, 1979. 103с. 13.04.1978. С.94. A separate page in this school book is dedicated to the military parade in the Red Square (c. 101).

of Novorossiisk or Volgograd (for the first time since the Leningrad stories in the post-war school books) etc.²⁴

3. *The insurmountable memory discourse: the post-Soviet version*

Since 1992, after the collapse of the Soviet Union, with sharp changes to the entire school curricula contents²⁵ school books begin to change, and a gradual demilitarization again is taking place. The number of mentionings and the length of texts become smaller. At first, such key figures as «my grandfather, a sniper» are retained. Particularly tell-tale in showing the departure of the military subject from the pedagogical discourse is the fact that for the first time since the end of the war, primers and *abecedaria* stop representing and legitimizing militaristic games for small children. In a school book written in 1991 and published in 1993, we see no playing with toy tanks or toy soldiers, there is no kid on horseback, armed to the teeth, no war games²⁶. War games present previously in Soviet primers were typologically similar to the militaristic games in the pre-Nazi (the Kaiser's Empire and the Weimar Republic) and Nazi German primers²⁷. They are absent from post-war West German school books (as they are absent from primers published during the same period in the Netherlands, Denmark, Norway, the US, and from the primers published today in the Czech Republic and Latvia since elementary education which includes the subject of war is viewed as contrary to contemporary humane pedagogical ideas, since only older children are capable of understanding anti-war subjects), yet Soviet study books, as we have already said, retained them until 1993.

²⁴ See for instance В.Г.Горещкий и др., *Букварь*, Изд.4е, Москва, Просвещение, 1984, 127с., 28.03.1983. 9 mentionings, but they are extremely long and highly charged: there are 6 direct mentionings, of them 2 texts are for the first time dedicated to the theme of veterans, there is a separate text about Novorossiisk (Malaya Zemlya), and the 'typical' slogan-like calls for peace, «peace for the world», «no to war» etc. are joined by «No one is forgotten! Nothing is forgotten» Dogs as medical aides at war make up a separate subject. В.Г. Горещкий и др., *Букварь*, Изд.7е, Москва, Просвещение, 1987, 127с., 04.07.1986. The same as the 4th edition, except Novorossiisk is replaced with Volgograd, and the «No one is forgotten...» slogan now refers to Volgograd. В.Г. Горещкий и др. *Азбука*, Москва, Просвещение, 1989, 191с., 13.05.1988. 8 mentionings, 4 direct; the themes of veterans, the Victory Parade, and «my grandfather the sniper» are retained, but Novorossiisk and Volgograd are gone without being replaced by some other hero city. The subject of border guards has been expanded somewhat, and medical aid dogs are gone.

²⁵ See the articles written by V. Kaplan, A. Shevyrev, I. Ionov in B. Eklof, L. E.Holmes and V. Kaplan (edd.), *Educational Reform in Post-Soviet Russia: Legacies and prospects*, L.-N.Y., Frank Cass, 2005.

²⁶ В.Г.Горещкий и др., *Азбука*, Учебник для 1 класса 4хлетней начальной школы, Изд. 8е, Москва, Просвещение, 1993, 191с., 26.11.1991.

²⁷ See bibliography: G. Teistler, *Fibel-Findbuch. Deutschsprachige Fibeln von den Anfängen bis 1944*, Eine Bibliographie, Osnabrück, H.Th. Wenner, 2003.

Similarly, they were retained in the schoolbooks published in the countries of the Warsaw pact until its dissolution and the advent of liberal regimes replacing the pro-Soviet ones in the countries of Central and South-Eastern Europe²⁸.

Abecedaria and primers published in the 1990s and in the early 2000s contain a very small number of war mentionings or make do without the subject at all; the war is mentioned slightly more often in school books published in the regions of the Russian Federation²⁹. For the first time since the Victory, the war might entirely ‘disappear’ from the ‘treasury’ of values and subjects that are deemed to be properly educational for elementary school children.

The mid-2000s are the divergent bifurcation point. Two trends have been formed for presenting the subject of war in a child’s first school book. One trend continues the demilitarized concept. Such publications pay the war very scant attention, although it becomes harder and harder in the 2010s since publishing houses include the Victory Day as a mandatory subject for all elementary schoolbooks³⁰. Publishing houses which produced elementary school books are controlled by way of a preliminary examination of schoolbooks by state commissions and the teachers’ community. Both the state and teachers constantly demand the war theme be included in elementary school books. The absence of ritual commemorative pages could give the Ministry for Education grounds to reject the schoolbook, to withhold its official stamp of approval (the

²⁸ I have compared schoolbooks published in the Czech Republic, in East Germany, West Germany, and the US. The military theme is present only in the elementary school books published within the Warsaw Pact countries, and it disappears completely after the collapse of the pro-Soviet regimes in the Czech Republic and in East Germany. Tracing the war theme in elementary school books in different countries is a special subject I will not touch upon in this article. Retaining the military theme in Russian primers is demonstrative and significant.

²⁹ See for instance: [Аноним], *Азбука. Аз. Буки. Веди*, Moskva, Лирус, 1994, 70с., 14.12.1994. 0 упоминаний. Д.Б.Эльконин, *Букварь*, Изд.2е, Moskva, Просвещение, 1994, 256с., 26.07.1993. 1 indirect mentioning. Л.Ф. Климанова, С.Г. Макеева, *АБВГДейка*, Азбука первоклассника, Moskva, Просвещение, 1995, 272с., 11.11.1994. 1 indirect mentioning. В.Г.Горецкий и др., *Букварь*, Изд. 18е, Moskva, Просвещение, 1998, 127с., 27.07.1998. 1 indirect mentioning. Л.Ф.Климанова, С.Г.Макеева, *АБВГДейка*, Азбука первоклассника в 2х частях, Часть 2, Moskva, Просвещение, 2001, 128с., 18.06.2001. 0 mentionings. М.К. Волков, *Азбука*, Для 1 класса чувашской школы, Изд.5е, перераб., Чебоксары, Кн.изд-во, 2001, 96с., 1.08.2001. 2 indirect mentioning. А.Ш.Нурмухаметова и др. *Азбука*, Учебник для 1 класса татарской школы, Казань, Магариф, 2002, 95с. 22.08.2002. 0 mentionings.

³⁰ Т.М. Андрианова, *Букварь: для 1 класса четырехлетней начальной школы*, Moskva, АСТ Астрель, 2009 [copyright 2003], 111 с., 03.02.2009. 1 indirect mentioning. Н.В. Нечаева, К.С.Белорусец, *Азбука*, Самара, Федоров, 2007, 112с., 15.12.2006. 0 mentionings. Н.М. Бегенькова, В.Г. Горецкий, Д.С.Фонин, *Азбука*, Учебник для 1 класса общеобразовательных учреждений, в 2х частях, Изд.3е, Moskva, Московские учебники-Ассоциация XXI век, 2006 [copyright 2004], Часть 1, 112с., 09.06.2006. 0 mentionings. Часть 2, 112с., 09.06.2006. 0 mentionings. Л.Е. Журова, А.О. Евдокимова, *Букварь*, 1 класс, в 2х частях, Moskva, Вентана-Граф, 2008, Часть 1, 160с., 18.12.2007. 3 indirect mentionings. Часть 2, 128с., 18.12.2007. 0 упоминаний; Л.Д. Митюшина, Е.А. Хамраева, *Азбука: для школ с родным (нерусским) и русским (неродным) языком обучения*, 1 класс, Moskva, Дрофа, 2008, 159 с., 28.11.2007. 0 mentionings; etc.

so-called *grif*), an official permission for the school book to be used in school. Without such a stamp of approval, a schoolbook is doomed.

The second trend appears to have emerged in the late 1990s, with the '1995 impetus' embodied in the renewal of military parades and other attributes of the army, the war, the victory. This trend 'revives' the war themes, defence of the Fatherland, memory of the Great Patriotic war. This trend relies on preserving the war theme in many regional publications and then gains momentum in central publications as well³¹. War veterans make it back to primers, they are no longer snipers, they are «my grandfather the signaller» and «my grandfather the ordinary soldier». Now they are venerated within the family (unlike in the school books of the 1970s-1980s). The theme of girls as medical orderlies appears again. Again, children are depicted playing war games. The soldier of the Great Patriotic war is shown as an heir to the cause of medieval warriors and Peter I's guards. The notion of a «war hero» makes it back to the list of words mastered by first grade students, in the context of slogans such as «peace builds, war destroys»³². «Hero city, warrior city Volgograd» also returns³³.

The second trend is clearly not the only one, but it is quite easily seen. Revived work with war memories and the return to shaping both adults' and children's collective war memories starting with the first grade of school are evident³⁴. Under the post-Soviet covers of the 2000s and 2010s there is a working Soviet totalitarian 'spring' of shaping, starting with the earliest childhood, the notions of the righteousness and legality of victorious wars conducted by one's own country, the notions of the war being many things besides ugly and tragic.

³¹ К.Ф. Дечули, Л.И. Сем, *Букварь*, для 1 класса ульчских школ, 3е изд., дораб., Sankt-Peterburg, филиал «Просвещения», 2001, 159с., 23.11.2003. 2 indirect mentionings. Н.И. Терешкин, Е.Д. Кулинич, М.В. Венго, *Букварь*, для 1 класса хантыйских школ (сургутский диалект), 3-е изд., испр.и доп., Sankt-Peterburg, филиал «Просвещения», 2002, 159с., 14.08.2002. 3 mentionings, 2 direct. М.К. Вишнякова, Т.К. Костина, *Мокишень букварь*, 1 класс: общеобразоват. учреждениятнendi учебник, Саранск, Мордовское книжное издательство, 2011, 95 с., 08.08.2011. Page 83 is dedicated to the theme of war and the Victory holiday. 4 illustrations, the text includes 64 words, 1 is «enemy», 3 words «war, warrior», 2 words «hero, heroic», 1 word «peace», 1 word 'holiday'. The main holiday is linked to the military victory over the enemy.

³² В.Г. Горещкий, М.М. Халидов, *Азбука*, Учебник для 1 класса четырехлетней начальной школы, Москва, Гном и Д, 2005, 208с., 11.03.2005. 8 mentionings, 4 direct. В.Г. Горещкий, В.А. Кирюшкин, А.Ф. Шанько, В.Д. Берестов, *Русская азбука*, Учебник для 1 класса, Изд.9е, Москва, Просвещение, 2006, 239с., 21.04.2003 (!). 5 mentionings, 3 direct. О.В.Джежелей, *Азбука*, Часть 1, Изд.7е, Москва, Дрофа, 2008, 157с., 25.03.2008. 5 mentionings, 2 direct (same as in the 5th edition in 2005).

³³ О.В.Джежелей, *Азбука*, cit., p. 133.

³⁴ The idea of when a child can be introduced to a particular subject is formed, on the one hand, on the basis of the child's image, his or her abilities, and, on the other hand, on the basis of the state's goals in education. Each school grades has its own trends and logic. This article analyses only the first schoolbooks a child comes across, variants of a 'hidden curriculum' for the first educational stage. The aim was to show the serious changes to the hidden curriculum. Children usually use primers for the first half of the school year. Post-primer schoolbooks are yet to be analysed along similar lines.

Conclusions

The structure of pedagogical *memoria*³⁵ appears to demonstrate four peaks of elementary school books' attention to remembering the War in the primers: 1) 1945-1948, the «living memory» period; 2) ca. 1955, the end of the first post-war decade; 3) the third quarter of the 1980s, the attempt to justify and retain the Soviet present through the Soviet past; 4) mid- 2000s, «nationalization» of the war memory, the return of the military uniform as a sign of a patriot and a citizen, the affirmation of the idea of a military *victory* as a symbol of the nation's greatness and indubitable progress in its state-building. In the Soviet time, the memory of the Victory didn't presuppose an open communication between generations touching upon the subject of children as victims of war. Only post-Soviet schoolbooks broached the subject of children overcoming «non-heroic» war-time hardships³⁶.

Be it as it may, the Soviet and post-Soviet space of the 1940s-2000s demonstrates the shaping and constant renewal of the concepts of 'war pedagogy' and 'military patriotism', when, against the background of the policy of revitalizing the images of the past War and the Victory, both schools and society broadcast to each subsequent generation the idea of a just war and of the world-wide services of their Motherland³⁷. Remembering the war becomes

³⁵ In this case, we view *memoria* as actions designed to emphasize, remember, and preserve certain events of the past in school children's memory.

³⁶ Soviet reading anthologies which followed *abecedaria* and primers in the curricula treated the issues of pioneers' heroic feats, of children helping soldiers and guerilla fighters, of keeping a soldier's 'word of honour', etc. Only in the 1960s, reading anthologies (firstly after father/motherless theme in 1944) began to feature an excerpt from A. Barto's poem *Zvenigorod* about an orphanage of war orphans; however, this subject wasn't particularly emphasized. The notion of 'sacrifice/victim' (*zbertva*) was applied only to the battlefield or to the work done for the benefit of the entire country (people, Motherland, state). Children, women, Jews weren't described as non-battle victims of the war. In the post-Soviet time, the approaches become more differentiated. Authors of many 1990s-2000s primers demonstrate a more complicated attitude to the subject of 'children and the Victory'. We see a broad range of materials selected: from the continued theme of 'children and guerilla fighters' to the temporary state of fatherlessness, to stories about 'small details' of children's life during the siege of Leningrad or to the telltale omission of the subject of a war-time childhood, deliberate denial of the subject of war in order for the past not to be repeated in the future. See: А. Якимович, *Роднае слова, Книга для чытання ў II класе пачатковай школы*, Мінск, Дзярж. выд-ва БССР, 1955, pp. 9-10, 46-47, 59-61, 97-104, 166, 170; Е.Е.Соловьева и др., *Родная речь, Книга для чтения во втором классе*, Москва, Prosveschenie, 1967, pp. 81-85, 92, 147-154, 162-166, 233-234; В.Г.Горещкий и др., *Родная речь, Книга для чтения, 2 класс*, Москва, Prosveschenie, 1983, pp. 98-105, 185-202, 242, 248-253, 255; М.В. Голованова и др., *Наше русское слово*, 2 класс, Части 1-2, Sankt-Peterburg, Spetsialnaya literatura, 1996; Р.Н. Бунеев, Е.В.Бунеева, *В одном счастливом детстве*, Книга для чтения в 3-м классе, Часть 2, Москва, Balass, 2001, pp. 200-209; Э.Э. Кац, *Литературное чтение: учебник для 4-го класса четырехклассной начальной школы: в 2 частях, Часть 2*, Москва, AST-Astrel, 2008.

³⁷ См.: А. Donson, *Youth in the Fatherless Land: War Pedagogy, Nationalism, and Authority in Germany, 1914-1918*, Cambridge, Harvard UP, 2010, p. 244; D. Caroli, *New sources for the teaching of history and of the Constitution in the Soviet Union: textbooks and school exercise*

first one of, and then the principal 'historical memory' presented to the children of every new generation. This practice is currently being criticized, but not as regards the elementary school³⁸. The discourse of war as a positive 'educational value' continues to deform the world of today's Russian childhood through ritual commemorative pages of reading primers, justifying war discourse existence by the constructed fact of insurmountable memory on the border between fragile peace and heroic battles.

books (1945-1965), «History of education & children's literature», vol. IV, n. 2, 2009, pp. 252, 257.

³⁸ O. Kucherenko, *'That'll Teach'em to Love Their Motherland!': Russian Youth Revisit the Battles of World War II*, «The Journal of Power Institutions in Post-Soviet Societies», vol. 12, 2011, <<http://pipss.revues.org/3866>> (last access: October 10th, 2013).

Morality for kids in cultural and historical measurements: patterns, translated by primary school textbooks and their transformation in the post-Soviet period*

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ABSTRACT: The article is aimed at searching for principles of cross-cultural comparison of moral systems. We accept anthropologically oriented approach, and undertake the study of the moral guidelines that the Russian society translates to the younger generations. Comparative analysis of the Soviet and post-Soviet textbooks have revealed both quantitative and qualitative changes in the moral standards, appraisements and judgments to be translated to children: the representativity of individualizing moral foundations expands, while the representativity of those 'working on the benefit of group' shrinks. Translators of moral standards in the Soviet period had a generalized nature: a large, stable social community – the Soviet people, the state – are represented in this role in the soviet textbooks. In the post-Soviet period the situation has changed: the function of moral socialization performed by more personalized subjects – a small group, family.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Moral Education; Social Perception; USSR; Russia; XX-XXI Centuries.

Introduction

As evident from the results of questionings, the morals of the Russian society and quality of interpersonal relationships are now the «pain spots» of mass

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consciousness¹. Are there any reasons for panics and accusations against family, mass media and, of course, school, or does the problem lie in the fact that the importance of morality, as such, is the same, but the change of the basic moral standards is perceived as the moral insanity by bearers of different moral standards?

Moral systems of different cultures and different historical epochs are essentially distinguished, and at times involve quite opposite principles and ideas. However, they may have universal components: cooperativeness (mutual aid), loyalty, respect for the power, control of sexuality, etc. What does make possible the formation of these universals, and set the stage for the distinctions?

Tackling this question is complicated by the undeniable fact that the moral psychology, as well as psychology in general, has taken roots in Western culture. The works by J. Piaget, L. Kohlberg and G. Rest concerned with development of moral consciousness and behaviour of an individual in accordance with the moral standards are classics of the moral psychology². Such orientation towards the values of Western culture resulted in the narrowing of the field of such moral issues as «Care/harm» and «Fairness/cheating»³. Cross-cultural differences that were discovered later⁴ made the researchers to abandon the Universalist approach and turned their attention to the moral guidelines peculiar to different cultures.

Based on the review of anthropological publications, Jonathan Haidt supplemented two 'classical' aspects with three aspects that draw our attention to the ideas of Durkheim that morality is largely concerned with the unification of people in society. These three criteria of morality – «Loyalty/betrayal», «Authority/subversion», and «Sanctity/degradation» – are opposed to two individualizing principles or foundations («Care/harm» and «Fairness/cheating») which generate virtues and practices that protect people from each

¹ A.V. Yurevich, D.V. Ushakov, *Nravstvennost v sovremennoy Rossii*, «Psihologicheskie issledovaniya: elektron. nauch. zhurn», vol. 1, n. 3, 2009, <<http://psystudy.ru/index.php/num/2009n1-3/41-yurevich3.html>>, in Russian (last access: December 28th, 2013).

² L. Kohlberg, *Essays on moral development: Vol. II. The psychology of moral development*, San Francisco, Harper & Row, 1984; J. Piaget, *Le jugement moral chez l'enfant*, 1932 (English translation: *The Moral Judgment of the Child*, London, Kegan Paul, Trench, Trubner and Co.); J.R. Rest, D. Narvaez, S.J. Thoma, M.J. Bebeau, *A Neo-Kohlbergian approach to morality research*, «Journal of Moral Education», n. 29, 2000, pp. 381-395.

³ J. Haidt, J. Graham, *When morality opposes justice: conservatives have moral intuitions that liberals may not recognize*, «Social Justice Research», n. 20-1, 2007, pp. 98-116.

⁴ G. Fang, F. Fang, M. Keller, W. Edelstein, J. Kehlet, M.A. Bray, *Social moral reasoning in Chinese children: A developmental study*, «Psychology in the Schools», n. 40, 2003, pp. 125-138; J.G. Miller, D.M. Bersoff, *Culture and moral judgment: how are conflicts between justice and interpersonal responsibilities resolved?*, «Journal of Personality and Social Psychology», n. 62, 1992, pp. 541-554; J.G. Miller, D.M. Bersoff, *The role of liking in perceptions of the moral responsibility to help: a cultural perspective*, «Journal of Experimental Social Psychology», n. 34, 1998, pp. 443-469.

other and allow them to live in harmony and act autonomously taking care of their own purposes⁵.

These basic systems can be regarded as ‘training modules’ which are the evolving modular systems that generate a large number of more specific modules which help children to identify patterns of goodness or wickedness valued or condemned in peculiar cultural environment as they come into the culture. Thus, the society establishes the conception of goodness and reproduces it in the process of child rearing.

1. *Organization and methods of research*

The study which findings are presented in this article is aimed at the analysis of the moral guidelines that the Russian society takes as the behavioural ‘criteria’ and translates to the younger generations. We pose the following questions:

1) What kind of moral attitudes are translated to primary school children by textbooks, and what kind of indicators can serve as a good reason to place a particular moral judgment, prescription and appraisal into specific category of ‘moral guidelines’?

2) What changes in the nature of moral foundations to be translated occurred in the first post-Soviet decade, and how, in this connection, has changed the content of primary school textbooks on literary reading?

3) How has changed the relationship between the texts translating different moral foundations in the post-Soviet period (in terms of quality), and how have changed the key images used for such translation?

In searching for the answers, we have analysed teaching material and cultural messages that it contains and that are translated to primary school children by the course of literary reading, which has, perhaps, the most direct relationship to moral socialization. The thesis that primary school textbooks on reading are intended not only to form and develop technical skills of putting letters together to make words, requires no proof. Such textbook presents to a primary school student the canon of priority images which is the first of its kind recommended by the state and pedagogics, and represents a set of every-day value orientations, as well as techniques for interacting with social and natural worlds and for self-interacting.

As a part of our study we have analysed content of 15 textbooks on literary reading (*Rodnaya Rech'*: «mother tongue») for primary school.

1. Three *Rodnaya Rech'* textbooks (1-3 grades) published by Prosveshchenije Publishing House in 1982-1983. Our study covers the statistical universe

⁵ Haidt, Graham, *When morality opposes justice: conservatives have moral intuitions that liberals may not recognize*, cit., pp. 98-116.

of textbooks on this subject for Russian-speaking elementary school children published at this period.

2. Twelve Literaturnoye Chteniye (literary reading)⁶ (1-4 grades) textbooks published by Prosveshchenije, Dropha and Ventana-Graph Publishing Houses in 2001-2005⁷. According to the experts' data provided by the Ministry of Education of the Russian Federation, the above teaching aids comprise 80% of the total number of textbooks on these subjects.

First we read the textbooks in whole, without any selection of literary works or specific images. The result of quantitative analysis of the text is given in Table 1.

Table 1. *Total number of texts in Rodnaya Rech' and Literaturnoye Chteniye textbooks that was analysed*

	<i>Number of Texts</i>	<i>Portion of Universe, %</i>
Soviet period (<i>Rodnaya Rech'</i>)	518	28
Post-Soviet period (<i>Literaturnoye Chteniye</i>)	1352	72
Total	1870	100

Even a cursory examination gives the impression that the textbooks published over the same historical period conform to the unified canon. The post-Soviet textbooks are very similar in their content, and get materials from the same source. The selected literary works inevitably overlap and generally show consensus on what should be taught to children.

According to the calculations, 673 (36%) out of 1870 analysed texts may be assigned to those directly related to the morality.

Table 2 gives the results of calculation of the portion of texts fallen in the categories – or moral foundations as J. Haidt put it – to be analysed.

Table 2. *The Representativity of Moral Foundations in the Texts in Primary School Textbooks of the Soviet and post-Soviet periods (% of texts with 'moral' orientation)*

<i>Moral Foundation</i>	<i>Soviet Period (208 texts)</i>	<i>Post-Soviet Period (465 texts)</i>
Care/harm	24	30
Fairness/cheating	14	30
Loyalty/betrayal	42	22
Authority/subversion	6	5
Sanctity/degradation	17	10

⁶ It's a new name of *Rodnaya Rech'* course of study. Tasks and character of these two courses are identical.

⁷ In the spring of 2005, the Ministry of education of the Russian Federation approved a new list of textbooks, which analysis is a task for future research.

As evident from Table 2, in the post-Soviet textbooks «Care/harm» and «Fairness/cheating» categories became more ‘weighty’, while the portion of texts fallen in «Loyalty/betrayal» and «Sanctity/degradation» categories became smaller. «Authority/subversion» category suffered practically no quantitative changes.

Thus, formal (quantitative) changes are obvious. Let’s turn to analysis of the contest of the above categories and consider each of them successively.

2. «Authority/subversion»

Let’s begin with examples of «Authority», the category that is represented rather ‘poorly’. Who are to be honoured according to the Soviet and post-Soviet textbooks?

The Soviet textbooks define a model of social hierarchy [ladder] rather clearly. In the first section of the 1-grade textbook this model is translated by five texts out of twelve: «We are active kids – we are Octobrists!⁸ You, October, don’t forget – communism is there yet [...]»⁹.

The fragment emphasizes the idea of vertical cultural transmission – the succession of perception and development of a particular ideology, and the subjects and sources of this succession are not specific persons, but social groups, and even depersonalized entities – symbolic events important for the social community («You, October, don’t forget – communism is there yet»). So apart from «Authority» which is obvious, «Loyalty» and «Sanctity» which imply honouring of the objects sacred for the group of subjects are also pronounced in the system of moral foundations. The whole complex is reproduced in the literary works intended for the next age group – the third-grade students getting ready to become pioneers: «The Young Pioneers had not yet come to the world, when Lenin called fighters for the cause of the workers to be prepared, but the young pioneers determined to be faithful to Lenin’s precepts»¹⁰. We also classify this and similar works with those translating the ‘verticalness’ moral foundation as a measure underlying such virtues as leadership and followership, including deference to legitimate authority and respect for traditions.

⁸ The Young Octobrists was an organization for children aged seven to nine. After the age of nine, in the 3rd grade, Young Octobrists would typically join the Young Pioneer organization.

⁹ M.S. Vasileva, L.A. Gorbushina, E.I. Nikitina, M.I. Omorokova, *Rodnaya rech. Kniga dlya chteniya v 1-m klasse*, Moscow, Prosveschenie, 1980 (in Russian), p. 4.

¹⁰ N.K. Krupskaya, *Be Prepared!*, in M.S. Vasileva, L.A. Gorbushina, E.I. Nikitina, M.I. Omorokova, *Rodnaya rech. Kniga dlya chteniya v 3-m klasse*, Moscow, Prosveschenie, 1974 (in Russian), pp. 7-8.

A fairly complicated moral motivation of behaviour is translated in the story *The Word of Honor* by L. Panteleev. This is seemingly simple to classify the motive with the «Sanctity» foundation by J. Haidt typology:

– Why are you still standing here then?

– I gave my word...

I was about to laugh, but choked my laughter and thought that there was nothing to laugh at, and that the boy was absolutely right. If you give your word, keep it no matter what happens – at any circumstances. And no matter whether it's a game or not¹¹.

However, there is another motive involved – the desire to obey the vertical orientation or hierarchy:

When the boy saw the officer, he somehow straightened, stood upright and became a few centimeters higher.

– Comrade guardsman – the officer asked him, – what is your rank?

– I am a Sergeant, – said the boy.

– Comrade Sergeant, I order you to leave the guard post.

The boy kept silence, sniffed and said:

– And what is your rank? I don't see... How many stars do you have?

– I am a Major.

And then the boy put his hand to a broad peak of his gray cap and said:

– Aye, Comrade Major: you ordered to leave the guard post¹².

We can assume that in this case there is a discrepancy between the motives that determine the essence of the boy's action (to keep his word), and the way of its implementation (obedience to the superior). It is precisely this formal aspect of the behaviour of the Soviet child reflected in the story that is the immediate product of militaristic attitudes of education which are so typical for the Soviet pedagogy. In fact, the military game (both because this is a game and because it is military) suggests the ritualized nature of the action.

By introducing one or another of symbolic systems the ritual makes it possible to create / strengthen a certain group identity¹³ and consequently loyalty to the group or persons occupying the top positions in the social hierarchy. Therefore, there is no content which is absolutely indifferent to the format¹⁴ (in our case, to the ritual), and this principle gives us a good reason to consider that both moral foundations gave approximately the same importance for the behavioural motivation of the protagonist of the story.

¹¹ L. Panteleev, *The Word of Honor*, in M.S. Vasileva, L.A. Gorbushina, E.I. Nikitina, M.I. Omorokova, *Rodnaya rech. Kniga dlya chteniya vo 2-m klasse*, Moscow, Prosveschenie, 1974 (in Russian), pp. 68-73.

¹² *Ibid.*

¹³ M. Douglas, *Natural Symbols: Explorations in Cosmology*, London, Barrie and Rockliff, The Cresset Press, 1970, pp. 289.

¹⁴ L.G. Ionin, *Sotsiologiya kulturny*, Moscow, ID GU VShE, 2004 (in Russian).

Some sections of the 1-grade textbook published in 2004 (by Prosveshchenije Publishing House) end with a centerfold titled *From the Old Books* containing which are statements of unknown origin (no reference to the source, author or the occasion on which the statements were made) that express apparently some ‘universal’ moral guidelines. In the majority of cases these guidelines are classified with the «Authority» foundation – respect for elders and people with higher social status, and in this case – for the teachers («Respect your parents, teachers and elders, and follow instructions of these first and advices of these latter»; «When elders speak, listen to them attentively and never interrupt»)¹⁵. These statements represent moral values and guidelines of post-figurative cultures¹⁶. However, since the textbook is oriented to the children growing up in the culture that more likely can be described as the pre-figurative one, the statements are perceived as an artificial attempt to make the unstable socio-cultural situation stable.

In another centrefold the theme of respect for elders is in part continued – «“Father” and “mother” are sacred words» but there is an additional moral aspect – a requirement of moral purity, which is fulfilled primarily through quivering attitude to the objects that are sacred for the group, and the attitude is enhanced by another statement – «Live not as you want, but as God commands»¹⁷.

Since we mentioned the ‘moral purity’, let’s consider the examples that we have placed into the category that translates the moral foundation of «Sanctity».

3. «Sanctity/degradation»

In the Soviet textbooks this category includes texts of different content. The 1-grade textbook has section titled *What is Good and What is Bad* that begins with poem of the same name by Vladimir Mayakovsky¹⁸. Broadly speaking, the evaluations («good/bad») are applied to phenomena of two types: first type represents phenomena that do not depend on the human will and, consequently, are not related to morality (weather events: hail or wind is bad for walking, and sunshine is good), and second type evaluations of personality which implies adherence to moral prescriptions or their violation. What are the moral foundations that provide the basis for evaluative relations?

¹⁵ *Rodnaya rech: Uchebnik dlya 1 klassa nachalnoy shkolyi*. Pod red. L.F. Klimanovoy, Moscow, Prosveshenie, 2004 (in Russian), p. 23.

¹⁶ M. Mead, *Culture and Commitment. A Study of the Generation Gap*, New York, Natural History Press/Doubleday and Co., 1970.

¹⁷ *Rodnaya rech: Uchebnik dlya 1 klassa*, cit, p. 76.

¹⁸ Vasilyeva et al., *Rodnaya rech. Kniga dlya chteniya v 1-m klasse*, cit., pp. 85-87.

There are only two foundations: harm to/care of the weak and vulnerable, and violation of the rules of hygiene. For the most part the poem is concerned with cleanliness and neatness and actually comes to the conclusion: «if you're now a piggy, you'll become a downright pig when you grow up bigger». It may appear that these rules are applicable only in the field of hygiene and health care, and cannot be regarded as moral principles. However the fact that the subject who violates them is evaluated very negatively («bad, untidy boy!»)¹⁹, and that the evaluations, both negative and positive (in case when the subject observes the rules), allows us to treat such prescriptions as those related to the morality.

We have interpreted the poem as the one translating such value as «Sanctity (purity)», because it is precisely the foundation that, according to the authors of the theory of moral foundations, was formed as a reaction to repulsion caused by something dirty and disgusting. The repulsion arising in connection with certain facts or behavioural manifestations is interpreted by people as a sign of violation of this moral foundation. Such repulsion is so strong and unpleasant, and apparently affects the psyche so deeply that the person suffering from it wants to eliminate the source of repulsion as soon as possible, and does not even attempt to analyse the nature of this feeling, that is, to understand the behaviour of another person that causes the repulsion at least from the standpoint of whether it affects the behaviour of other people or is exclusively personal matter²⁰. It underlies the widespread idea that the body is a temple which can be desecrated by immoral activities and contaminants (an idea not unique to religious traditions).

The 4-grade textbook published in 2004 (by Prosveshchenije Publishing House) has two interesting examples 'working' to the benefit of «Sanctity». The fragment from the story *People of God – Home Chest* by B. Zaitzev – tells the story of a boy, woman cook's son, who lived at an estate and turned out to be mentally and physically retarded at the age of three, as well as of his relationship with other persons living at the estate – the masters and servants²¹.

This is the only text in the textbook in which healthy and handicapped – and primarily communicably handicapped people, since the boy's cannot speak clearly – interact. Nevertheless, people, especially children, understand and love him – he is a friend of the master's daughter, and every day is treated with tea and gingerbread or pie. How do the inhabitants of the estate perceive the boy? May we interpret their friendly attitude towards him as the one that corresponds to the moral foundation of loyalty to in-group (we-group) or care? Or should

¹⁹ *Ibid.*

²⁰ J. Haidt, *The emotional dog and its rational tail: A social intuitionist approach to moral judgment*, «Psychological Review», n. 108, 4, 2001, pp. 814-834.

²¹ *Rodnaya rech: Uchebnik po chteniyu dlya uchaschihsya nachalnoy shkolyi. V 3 knigab. Kniga 3. Dlya 4 klassa. Ch. 2.* Sost. M.V. Golovanova, V.G. Goretskiy, L.F. Klimanova, Moscow, Prosveschenie, 2004 (in Russian), pp. 14-17.

be take it for something else? His mother «by her Russian-woman's inclination loved him more than others, and felt sorry for him»²² – this is the classic 'female' foundation of attitude towards people based on the aspiration to take care of the vulnerable who need it most of all. As for strangers, their attitude towards the boy shows awe of «a holy fool» («blessed fool» or «fool for Christ») inherent in the Orthodox tradition rather than just care of a weak person. What was the perception of a holy fool in the Orthodoxy? People usually perceived him as a member of in-group (we-group), but specially gifted and behaved in a shocking and unconventional way that they could not understand and copy – he was both «group-fellow» and «alien» (or «stranger») at the same time. For instance, the story says that «[...] he seems not to do anything, but live being a part of community» («the group-fellow»); but «he can say you something in his own language, giggle and run away following his moods»²³ («the alien»). Such borderline position allowed the holy fool to act like a 'mirror' reflecting human vices that he showed in a caricature manner so that people could see themselves as viewed by others. It is possible that the estate inhabitants' attitude permeated by similar expectations was so tender because his friendliness and carelessness, when regarded as a mirror image of their life and relationships, told them of safe and happy life – as long as the mirror reflected the world in this manner, they could stay tranquil and try to appreciate what they had. Thus, the moral foundation of interaction with the boy described in the story is more likely the awe of the objects sacred for the group, although the motives of care and loyalty to the group-fellows also support and enhance the effectiveness of this moral foundation.

The second text is *The Tale of the Toad and the Rose* by V. Garshin²⁴. Since the images in this literary work are symbolic, and feelings that they provoke are rather strong, independent analysis of the text will most likely be challenging for school children: it requires consistent intellectual work and search of clues.

However, the depth and intensity of emotions, in particular, of disgust and indignation that the children may feel when reading the description of appearance, thoughts and behaviour of the toads, 'suggest' that there is a threat to moral precepts and principles²⁵, and hence, on the one hand, make the logic analysis of the text more difficult and on the other on the one hand make its intuitive perception easier²⁶. To be more precise, they not even suggest but associate with emotions that usually reveal violation of morality, and thus

²² *Ibid.*

²³ *Ibid.*

²⁴ *Rodnaya rech: Uchebnik po chteniyu. Dlya 4 klassa. Ch. 2, cit., pp. 226-234.*

²⁵ Haidt, *The emotional dog and its rational tail: A social intuitionist approach to moral judgment*, cit.

²⁶ J. Greene, J. Cohen, *The neural bases of cognitive conflict and control in moral judgment*, «Neuron», n. 44, 2004, p. 389.

facilitate the automatism – automatic interpretation of the events provoking such emotions as immoral.

Actually, if we analyse the toad's motivation²⁷ we cannot call it low or disgusting, since the toad was striving for perfect things²⁸. More likely that low and disgusting is the archaic form of adopting these perfect things – an attempt to assume and, in the literal sense, swallow up the fascinating things. Similar ambitions formed the basis of certain rituals of eating totem animals that are typical for many archaic cultures and connected with the belief that by eating a sacred animal people can get spiritually higher or acquire supernatural powers.

In fact, in this case people act the same way – they pluck the flower and dry it, but such death seems preferable for the Rose. The Rose managed to give several bright moments to a dying boy, and to keep a memory of him.

However, according to the results of the empirical studies made by J. Haidt, the above arguments can be supported only by individuals with pronounced liberal orientations who act predominantly in accordance with 'individualizing' moral foundations or concepts of justice and care of those in need, that is to say, with the moral prescriptions that allow an individual to defend his/her uniqueness and that manifest themselves in interpersonal interactions at the level of individuals. Conversely, conservatives who value cohesion, vitality and group success much more than individual success, behave in accordance with more moral foundations, including the aspiration for purity and innocence, which apparently forms the main idea of Garshin's tale.

4. «Loyalty/betrayal»

In addition to «Authority» and «Sanctity», the third moral foundation described by J. Haidt as more significant in non-Western cultures is «Loyalty (group cohesion)» which violation is interpreted as betrayal of the group.

The image of «group-fellow» in the Soviet and post-Soviet textbooks is formed mainly on the principle of exclusion, that is, contrast to the image of «alien» which is essential to enhance the moral imperative of assistance to «group-fellows» and to strengthen the group cohesion. In all probability, like at the early stages of history the perception of «they» is the starting point of the process of self-determination through the desire to separate «they» and «we» (to get isolated from «them»).

²⁷ The reasoning about the toad's 'motivation' sounds rather strangely, but I think the relativity of the categories used is clear.

²⁸ Apparently, the artist who illustrated this literary work had something similar in his mind – his toad is sad and quite graceful; however, both the toad and the surrounding branches and leaves are gray, while the hot pink flower on the gray background clearly symbolizes tenderness and beauty of the world.

The concept of «alien» inevitably comes about in situations when certain phenomena of different culture do not agree with those adopted by the we-group's culture. The term «alien» has several meanings used in the ordinary sense, rather than in scientific discourse:

- someone who comes from a different place or foreign land outside observer's own culture;
- someone odd, unusual, in contrast to ordinary and common environment;
- someone unacquainted, unknown and incomprehensible (impossible or very difficult to understand);
- someone supernatural, almighty, having power and control over human affairs;
- someone ominous and life-threatening.

Thus, the term «alien» does not initially imply hostility. The category of «alien» and the idea of positive attitude towards it – no matter how strange it may seem to the observer are at the centre of *The Legend* by V.V. Veresaev. Here is also reference to the moral norm of justice from the standpoint of deserved thing: terrible punishment upon sailors for impudent destruction of something that was unknown and alien to them – «Merry sailors were not killed. They returned to the ship, but since then they never smiled»²⁹. It is important that «the subject punished the sailors» is not identified: they ruined the wood sacred for natives and, at first glance, it seems logical that it was the wood that punished them. This would have happened, and, probably, the punishment would have suggested the death of the profaner of the holy place if he were a native. However the profaners were punished «by their own culture» and got an inescapable feeling of guilt that was very difficult to compensate even by high moral actions in the future. So, the main idea representing the author's attitude to «alien» is: «How all this is difficult, deep and mysterious!»³⁰.

As a whole, the «we» category is formed by mutual likening of people, that is, by mechanisms of imitation and contagion, while «they» is formed by elimination of these mechanisms. Perhaps that is the reason why the image of alien is always impersonal – if one keynote is to «Know Thy Heroes» so that to get an opportunity to repeat their deeds in details, the same is not needed in respect to alien. The «alien» is conceived and perceived in the light of his group membership [belonging] (as opposed to individualized «group-fellow») which is expressed by well-known principle of intergroup perception «for-me-they-all-are-alike».

By way of illustration we can mention poem *Rus* by I.S. Nikitin included in the post-Soviet textbooks published by all three publishing houses: «Tatar

²⁹ *Literaturnoe chtenie: Uchebnik dlya uchashchihsya 4 klassa obsheobrazovatelnyih uchrezhdeniy: v 2ch. Ch.2, Avt.-sost.: L.A. Efrosinina, M.I. Omorokova, Moscow, Ventana-Graf, 2005 (in Russian)*, p. 50.

³⁰ *Ibid.*

hordes» and «a dark storm-cloud (from the West)». In the Soviet textbooks we can read that, «out of the smoke and fire poured the bourgeois forces»³¹, and that «armies of many thousands of enemies tried to stifle the state of workers and peasants»³².

It is easier to fight against depersonalized evil, that is, the evil lacking in feelings, emotions and sufferings which gives rise to no sympathy, and therefore it is easier to transform the image of alien into the image of enemy³³.

The most common way to construct the image of enemy involves a combination of two planes: metaphorical, beyond the everyday life or abstract, that is, empirically unverifiable plane, on the one hand, and specific plane, on the other. The first plane which ordinary consciousness does not perceive completely, is not entirely clear, and apparently must provoke an uncertain sensation of participation in the great and mysterious mission of fight against the evil, as such, but emotional heat [intensity of emotions] caused by metaphorical images, but not backed by feelings and everyday experiences would abate sooner or later. Actualization of everyday empirical experience feeds it.

The manner in which ominous context «alien = hostile» is actualized in intergroup interaction is illustrated by *The Star* fairy-tale by V.V. Veresaev: a brave young man brought light to his people who had been dreaming of it for a long time living in darkness. However when they saw their homes, dearly loved persons and themselves in the light, they felt repugnance³⁴ (thus, «alien» adopted as the standard can cause re-evaluation of usual phenomena, and, therefore, bring the threat to identity because we are what we like and striving for). Fear of the alien capable to change the whole system of the world-concept and self-concept and hence having supernatural powers (if it may defy and transform everything that is considered stable and sacred) incites people to act. The enlightened people in Veresaev's story tried to destroy both the star and the boy who brought it because they believed them to be «the root of all evil». The typical course of events is as follows: invasion of «alien» leads to re-evaluation of the «own», and negative identity calls for compensation which can be achieved through humiliation and creation of even more negative image of the alien – and search for real object to fit this negative image – the image of enemy is personified and becomes the object of aggression.

We can say without exaggeration that the image of enemy in the Soviet textbooks is one of the central. It will suffice to mention that in the 1980 edition of the textbook there is a separate theme dedicated to the army (and no themes related to pedagogy or medicine, for example). It cannot be disputed that behind

³¹ Vasileva *et al.*, *Rodnaya rech. Kniga dlya chteniya v 3-m klasse*, cit., p. 99.

³² *Ibid.*, p. 107.

³³ S. Keen, *Faces of Enemy. Reflections of the Hostile Imagination*, San Francisco, Harper & Row, 1986.

³⁴ *Literaturnoe chtenie: Uchebnik dlya uchaschihsya 4 klassa obsheobrazovatelnykh uchrezhdeniy*, Ch. 2, cit., pp. 51-58.

this cult of ‘power’ structures [security forces] is both traumatic historical experience and the ‘cold war’, which was topical at that time and accompanied by numerous armed conflicts in which the Soviet Union was latently involved.

However, the post-Soviet textbooks cover the «Loyalty» moral foundation within the same ‘paramilitary’ theme – also combined with cruelty to «aliens»: «And Oleg hung his shield on the gates of Tzargrad [Constantinople]»:

Oleg came to the seaside and began to fight. And he killed a lot of people around the city, destroyed a lot of mansions and burnt a lot of churches. And many other evils were done by Russians to Greeks, as enemies usually do [...]. And Oleg ordered Greeks to give two thousand ships, and twelve hryvnias per person as tribute, and there were forty men on board of each ship; and then he ordered to give a tribute to the Russian cities: first of all, to Kiev and then to Chernigov, Pereiaslavl, Polotsk, Rostov, Lyubech and other cities, as these cities were ruled by the princes dependent on Oleg³⁵.

In the work titled *Kuzma Minin and Dmitry Pozharsky at the Head of Militia* the enemy is identified only in the last line – «To war with the Poles», while the whole song describes the preparation for the war for their homeland underlining the boldness and bravery of the Russian warriors, and their determination to defend the homeland «with all hands» [together]³⁶. It is indicative for solidarity on negative basis that the enemy remains unknown until the last moment; the only important thing to mobilize the group is to see the threat and to resist it.

The ‘enemies’ in the Soviet textbooks, as well as in ‘adult’ Soviet literature, are extremely diversified, including representatives of the former privileged classes – the Whites, officers, capitalists, and priests, the enemies at the time the Second World War – the Nazis and spies smuggled into the Soviet Union to conduct subversive activities, and a variety of ethnic and ‘national’ enemies of the Russian Empire – invaders³⁷. In the post-Soviet children’s literature only the last-mentioned type remained but it was used very actively.

One of the basic methods of constructing the image of enemy is the use of different criteria in assessing the actions of «us» and «them». As an example let us consider two literary works arranged one after another in the first section – *Heroic Song and Legend*. The section begins with *bylina* (Russian epos) about *Volkh Vseslavovich*³⁸. The enemy is represented by a certain Saltyk, King of

³⁵ *Rodnaya rech: Uchebnik po chteniyu dlya uchaschihsya nachalnoy shkoly. V 3 knigah. Kniga 3. Dlya 4 klassa Ch. 2*, Sost.: M.V. Golovanova, V.G. Goretskiy, L.F. Klimanova, Moscow, Prosveschenie, 2004 (in Russian), pp. 4-6.

³⁶ *Literaturnoe chtenie: Uchebnik dlya uchaschihsya 4 klassa obscheobrazovatelnykh uchrezhdeniy: v 2ch, Ch.1*, Avt.-sost.: L.A. Efrosinina, M.I. Omorokova, Moscow, Ventana-Graf, 2005 (in Russian), p. 8.

³⁷ L. Gudkov, *Ideologema «vruga»*. *Tehnika propagandy i mobilizatsii. Sostavlyayushchie ritoriki «vruga» v sovetskom totalitarnom iskusstve i literature*, <<http://psyfactor.org/lib/gudkov5.htm>>, in Russian (last access: December 28th, 2013).

³⁸ *Literaturnoe chtenie: Uchebnik dlya uchaschihsya 4 klassa obscheobrazovatelnykh uchrezhdeniy: v 2ch, Ch.1*, Avt.-sost.: L.A. Efrosinina, M.I. Omorokova, Moscow, Ventana-Graf,

the southern lands. He intends to conquer all the Russian cities and to do harm directly to the epic hero, the protagonist. His negative image is created through translation of aggressive thoughts and evil deeds (Saltyk is extremely rude to his wife), but in general, his image is rather comic – the illustration shows him as a ridiculous little man with thin legs, but in a magnificent garment. By the way, the garment clearly shows that he is a representative of Muslim culture – the king is drawn in a robe and with a dagger at his belt, and the queen – with the veiled face.

Exactly the same aggressive plans are made by Tsar Ivan IV in the next work of the same section – *The Legend of the Conquest of Siberia by Yermak*, and are fulfilled by Yermak by order of the Tsar. Here is what the Tsar tells Yermak: «There are rich soils behind the Ural Mountains. Go there, catch Kuchum Khan, and bring his people under the authority of Russia»³⁹. Although as a conqueror Yermak is portrayed in the same manner as Saltyk, but he is handsome and slender, and rides a graceful white (the colour of purity and lofty thoughts) horse. These ‘double standards’ are even re-doubled by the fact that as the aggressive actions are supposedly driven not only by mercantile motivation of the king, but also declared concern for the conquered peoples – «and Kuchum’s people will feel better with us».

Thus, though during the post-Soviet period the image of «alien and enemy» was employed far less actively compared to the Soviet era, but still actively enough for us to continue considering this phenomenon as one of the main tools of group consolidation. In totalitarian societies the image of ‘enemy’ is vitally important in maintenance of the closeness of social and cultural system, creation of reliable inner barriers against ‘pernicious’ foreign influence, on the one hand, and in formation of the set to destroy internal enemies, on the other. In democratic societies based on the civil freedom of self-expression and on informed consent to accept the ‘rules’ there is no need to use such mechanisms. However, a question as to whether present-day Russian is democratic state is out of the format of this article.

5. «Fairness/cheating»

According to Haidt, next moral foundation – «Fairness» – defines ‘individualizing’ cultural bases. However, it is not that simple – in primary school textbooks the theme of justice is found rather often, but not in the context of universalism (fairness as acceptance of and adherence to universal

2005, pp. 4-7.

³⁹ *Literaturnoe chtenie: Uchebnik dlya uchashihhsya 4 klassa obsheobrazovatelnykh uchrezhdeniy: v 2ch, Ch.1, cit., pp. 15-17.*

rules and regulations), which is basic to individual rights and freedoms of every member of the group.

It should be noted that the norm of fairness being by itself a cultural universal can be implemented in different forms, and the choice of form has both group/cultural and perhaps individual specificity.

«The beauty of the debt is payment» [One good turn deserves another] – this saying is given together with Leo Tolstoy's fable *The Ant and the Dove*⁴⁰ in the 1980 textbook to represent the main idea of the fable, in the authors' opinion. The case in point is obviously fairness in the form of mutuality – norm aimed at implementation of group's interests and maintenance of group cohesion through the adoption of system of mutual obligations. Hence, J. Rest revises Kohlberg's ideas of the role of fairness in the formation of individual's system of moral judgments apart from those that are assigned by Kohlberg to the level of conventional moral ideas of fairness as of respect for the rights of all participants in the interaction – respect for partner, unification of procedures and elimination of prejudices which Rest calls «procedural fairness», and studies «distributive fairness» – a set of rules of reward distribution – and attributes such ideas of fairness to the earlier stages of moral development of individual that are oriented to pattern of personal interest⁴¹.

The social significance of distributive fairness, however, gained acceptance in the works of cultural anthropologists: L. Tiger and R. Fox take a «network of gratitude» established as a result of actualization of the norms of distributive fairness as a unique human adaptive mechanism that makes possible division of labour, exchange of various types of goods and services (by providing conditions for training of specialists) and formation of a system of interdependencies that unite individuals in highly efficient organizational units⁴².

Accordingly, the norm of fairness in the form of mutuality translated in Tolstoy's fable is obviously positive for the maintenance of integrity, cohesion and vitality of the group. Essentially similar settings and behaviour patterns are translated by folk tales⁴³.

In the post-Soviet textbooks the norms of «procedural fairness» are represented much better. Fairness as moral foundation of individual behaviour is inherent mainly in the situations when fairness is first violated and then restored⁴⁴. In the last-mentioned work the reader's attention should be drawn

⁴⁰ Vasileva et al., *Rodnaya rech. Kniga dlya chteniya v 1-m klasse*, cit., p. 36.

⁴¹ L. Myrsky, K. Helkama, *Moral reasoning and the use of procedural justice rules in hypothetical and real-life dilemmas*, «Social Justice Research», n. 15, 2002, pp. 373-391; C.A. Wendorf, S. Alexander, I.J. Firestone, *Social justice and moral reasoning: an empirical integration of two paradigms in psychological research*, «Social Justice Research», n. 15-1, 2002, pp. 19-39.

⁴² L. Tiger, R. Fox, *The imperial animal*, New York, Holt, Rinehart & Winston, 1971.

⁴³ Vasileva et al., *Rodnaya rech. Kniga dlya chteniya v 1-m klasse*, cit., pp. 102-107.

⁴⁴ *Rodnaya rech: Uchebnik po chteniyu dlya uchaschihsya 2 klassa nachalnoy shkolyi. Ch. 2*, Sost.: L.F. Klimanova, V.G. Goretskiy, M.V. Golovanova, Mocsow, Prosveschenie, 2004 (in Russian), pp. 85-86, 159-165, 96-103.

to actualization of strong emotion, that is, remorse of the main character – the boy who did unseemly thing.

«Fear», «shame», «duty», «responsibility», «honour», «face saving», «conscience», «sense of guilt», «self-esteem», etc. are the motives and feelings that act as regulators of individual behaviour. The researchers place particular emphasis upon the significance of fear, shame and sense of guilt in specific cultures. In this case, let us focus our attention on the distinctions between shame and guilt.

In distinction to shame making people to look at themselves through the eyes of «important persons», the sense of guilt is inner and subjective, and implies self-trial⁴⁵. It covers not only actions, but also secret thoughts, and is more flexible in its content. Therefore, it is no coincidence that the norms of procedural fairness is much better represented in the post-Soviet textbooks published at the period characterized by wider variability of lifestyles and daily practices in comparison with the Soviet period. However, the theme of distributive fairness remains one of the most important: since this moral foundation creates the moral content of fairy tales included in arranged in folk sections⁴⁶.

6. «Care/harm»

Finally, one more ‘individualizing’ moral foundation is «Care», that is to say, assistance to the poor and needy. It should be noted straight away that proportion of texts and illustrations oriented to translation of the morality of care in the post-Soviet textbooks became bigger than in the Soviet ones.

It is partly due to our understanding of care and therefore requires some explanations. The researchers repeatedly paid attention to the significance of this category in the Soviet ideology and, moreover, considered it as the basic category to look at the relations between the state and citizens⁴⁷. Among other things, E. Bogdanova illustrates this thesis by reference to the fact that in the 1997 Soviet Constitution the «care» category occurs 12 times, and defines the nature and rules of relationships of the various objects and subjects: state

⁴⁵ R. Benedict, *The Chrysanthemum and the Sword: Patterns of Japanese culture*, Boston, Houghton Mifflin Co, 1946.

⁴⁶ *Rodnaya rech: Uchebnik po chteniyu dlya uchaschihsya 2 klassa nachalnoy shkolyi. Ch. 2*, cit., pp. 42-53.

⁴⁷ I. Mihaylovskaya, *Kontseptsiya prav cheloveka i ih znachenie dlya postkommunisticheskoy Rossii*, «Rossiyskiy byulleten po pravam cheloveka», n. 9, Moscow, Institut prav cheloveka, 1997, <<http://www.hrighs.ru/text/b9/Chapter5.htm>>, in Russian (last access: December 28th, 2013); E.A. Bogdanova, *Sovetskiy opyt regulirovaniya pravovyih otnosheniy, ili «v ozhidanii zaboty»*, «Zhurnal sotsiologii i sotsialnoy antropologii», vol. IX-1, n. 34, 2006, pp. 77-90 (in Russian).

concept of social relations is expressed as follows: «The Soviet society is a society in which the law of life is concern of all for the good of each and concern of each for the good of all»⁴⁸.

This category is represented in a wide diversity of senses and attitudes which certainly leads to weakening of its meaning. Conceptually, in this category all moral foundations collide with each other: the morality of care becomes indistinguishable from the «verticalness», «fairness» and «respect for authority». As a result, the «care» which the modern Western psychology presents as the moral norm that governs interpersonal relationships and interaction in the primary groups, turns into ideological mechanism of social regulation. However, some «flair» of the classical interpretation of its essence remains: this is the norm of family relations, first of all, and considering the fact that in the Soviet ideology the borders of family were so wide that covered all Soviet people, it is logical that the care was implemented as the principle of paternalism. The care becomes total ('pervasive' and 'continuous'), based on clear social hierarchy (the subject is always stronger and more powerful), focused on the reproduction of relations of subject (the one who cares) and object (the one who is cared)⁴⁹ which naturally leads to diffusion of responsibility of the 'object' who being released from the responsibility becomes 'released' from the rights as well.

In this article we orient ourselves to the psychological understanding of care, and analyse the character of its representation as the moral foundation.

As illustrated above, in the post-Soviet textbooks the theme of «group cohesion» is also pronounced, but the nature of separation into «ours» and «their» differs essentially from that at the Soviet period. The Soviet textbooks suggest that «ours» include, first of all, family members and friends which makes the line between «group cohesion» and care rather transparent: a child represented in texts and visual material of Russian textbooks, is oriented to the interests of their immediate environment – the family, and reproduces the family model in other context⁵⁰.

The care as moral foundation introduced into psychology by K. Gilligan, reflects, in her opinion, the specificity of women's moral development. Therefore, it is logical to look at the examples centralized on female images.

The image of women in the Soviet textbook is pictured within the Soviet gender contract – the «working mother» that emerged in the 1930s: a woman engaged in social production is a full-time worker, but she also brings up children, sharing this responsibility with the state institutions and relatives, and

⁴⁸ The Constitution of the USSR, 1977, cited by Bogdanova, *Sovetskiy opyt regulirovaniya pravovyih otnosheniy, ili «v ozhidanii zaboty»*.

⁴⁹ Bogdanova, *Sovetskiy opyt regulirovaniya pravovyih otnosheniy, ili «v ozhidanii zaboty»*, cit.

⁵⁰ *Rodnaya rech: Uchebnik po chteniyu dlya uchaschihsya nachalnoy shkoly. V 3 knigah. Kniga 3. Dlya 4 klassa. Ch. 2*, Sost.: M.V. Golovanova, V.G. Goretskiy, L.F. Klimanova, Moscow, Prosveschenie, 2004, (in Russian), pp. 137-143.

runs the home. A woman can be a weaver at the factory, a tractor driver in the field, an engineer on a construction site, or a doctor in a small northern settlement. «Why do people / From our factory / Say that – my mother / Has hands of gold? / I will not argue, / They know better – / Because they work / Together with my Mom!»⁵¹. In fact, it turns out that the woman is closer and ‘more familiar’ to her colleagues rather than to her own children.

The car orientation in the Soviet textbooks is by no means declared as ‘female’ orientation. To the contrary, women provide care nearly more rarely than men⁵². The central image of the Soviet textbook is image of Lenin, the leader of the world proletariat, rich in moral imperatives and contexts. The image of Lenin appears to be a basis of social hierarchy and, therefore, inspires the moral foundation of «verticalness/respect for authority». However, to maintain the vitality of constructed image it must find more specific, humane traits that would change the perspective of perception. Since we are dealing with the perception of primary school children – who are still very close to the family – these must be the traits that humanize the image, and help to take the child from the ‘big social circle’ into the ‘small circle’ of close and clear everyday life which is full of warmth of human interaction. These traits translate the norm of care that even if it holds a peripheral position and, perhaps, due to this position, escapes the attention, and its translation proves to be really effective.

For example, in his story *In the Mountains* N. Khodza narrates how Lenin «moulded his will power» when he and his friend got over dangerous place in the mountains risking their lives: «A revolutionary has no right to let fear prevail his will. We, my friend, must mould our will every day and every hour». The last lines of the story are: «He reached down and plucked few simple blue flowers. – For Nadezhda Konstantinovna [Krupskaya] – Lenin said softly. – She loves field flowers»⁵³. By the way, Krupskaya, even if she plays the leading part in a number of literary works included in primary school textbooks, appears only as a revolutionary and translator of ideological norms, but in no work as a caregiver which is the ‘typical’ female image.

Therefore, it is hardly surprising that a major proportion of the texts translating the norm of care can be found in the section *Lenin with Us*. Actually, the title of the section sets the readers to perceive Lenin as a man who is dear to everybody. Texts where the leader of the world proletariat is represented in daily communication with children, workers, Red Army med amount to more than 50% – five out of eight texts. Thus, we return to the «care» which is one of the strongholds of the Soviet ideology.

⁵¹ Vasileva et al., *Rodnaya rech. Kniga dlya chteniya v 1-m klasse*, cit., p. 79.

⁵² For the examples – see Vasilyeva et al., *Rodnaya Rech’, 2-grade book for reading*, cit., pp. 106, 105, 123-126, 131-135, 187-189.

⁵³ Vasileva et al., *Rodnaya rech. Kniga dlya chteniya v 3-m klasse*, cit., p. 315.

In the post-Soviet textbooks we can see restoration of traditional gender pattern. An occasion for reflection on the extent to which the 'traditional nature' is maintained is given by the task offered to the first-grade students: it presents a number of riddles. Each riddle lists the actions or definitions (social roles) and offers the children to pick the noun that is best matched to the definition⁵⁴. A boy in these riddles is defined as a «student», «schoolboy», «son» and «prankish child», and in this case, it is logical that his father is a «craftsman», «worker», «parent», «friend» and «husband»; a girl is a «Smiley Face», «fidget», «little lady», «granddaughter», «daughter» and «helper», and mother is a «housewife», «woman», «daughter», «wife», «cook», «seamstress» and «comforter». The children are offered the appropriate set of women's functions: to «wait», «meet», «ask», «feed», «read», «cook», «wash», «sew», «fry», «bustle about», «sing», «escort», «get tired», «laugh», «look after» and «protect». The illustration for the text shows a red cat (!) with three kittens sleeping with their muzzles buried in mother's belly, and mother cat is happy and touched when looking at them.

Apparently, the desire to consolidate the traditional pattern, including family relations, is responsible for the prevalence of folk texts and texts by pre-revolutionary authors in the post-Soviet books (Table 3).

Table 3. *The Relationship between Texts of Different Periods That Translate the Morality of Care in the Soviet and Post-Soviet Textbooks (% of total number of texts)*

Authors	Folk	Foreign	Pre-revolutionary	Soviet
Period				
Soviet	0	0	7	93
Post-Soviet	13	4	37	45

In the present-day textbook a woman is, first of all, mother, and the basic moral foundation of her behaviour is care of her child, affection and support. In this case, the woman in the texts included in the textbooks, is rarely the object of care. As a rule, the image of mother taking care of children is hardly personified by little, and her needs and interests of neither known to the readers nor taken into account by other characters, which gives grounds to assign this standard of care to the second stage of moral development, in accordance with the with the concept of K. Gilligan. In fact, a woman has no choice – moral dilemma – and her actions and even experience can be treated as prescribed ones, that is to say, the morality remains at the conventional level, and the woman is engaged in

⁵⁴ *Chtenie i literatura: Ucheb.dlya chetyirehlet.nach.shk, 1 kl., V 2 ch.. Ch. 1, Avt-sost. O.V. Dzhezheley, Moscow, Drofa, 2002, p. 67.*

the routine as a «caregiver» of young children, aging parents, hungry husbands and freezing kittens.

In general, the increased number of texts and illustrations intended to create / actualize the morality of care in the post-Soviet textbooks probably results from the current trend of individualization and narrowing of the represented category of «ours» to the level of the immediate environment – family and friends. As a result, the care in the form of custody / protection / support of loved ones becomes the basic moral foundation in the spectrum of foundations translated by schoolbooks.

Conclusion

Thus, the Soviet system of moral guidelines, as demonstrated by our analysis, was based on the categories that, first of all, involve strengthening of the social community, since the virtues, practices and institutions are oriented to binding people together in hierarchically organized interdependent social groups that are able to control everyday life and personal habits of their members. In contrast to them, other two foundations («Care» and «Fairness») are aimed at individualization, and reproduction of virtues and practices intended to protect people from each other and to allow them to live in harmony as autonomous agents that can focus on their own purposes.

Comparative analysis of content (texts and illustrations) of the Soviet and post-Soviet primary school textbooks has revealed both quantitative and qualitative changes in the moral standards, appraisements and judgments to be translated to children. Such moral foundations as care and assistance to the poor and needy, as well as fairness (in terms of «procedural fairness») in the post-Soviet textbooks are translated more consistently and extensively than in the Soviet times, and such categories as «group solidarity and loyalty to ‘we-group’», «righteousness – worship of the objects sacred for the group», and «distributive justice», on the contrary, relegate to the background. In other words, the representativity of individualizing moral foundations expands, while the representativity of those «working on the benefit of group» shrinks [gets narrow].

There are also changes in the objects to which certain moral norms and appraisements should be applied. Thus, «authoritative person/persons» respect for which is translated to the younger generation as a moral norm at the Soviet period are representatives of the older generation – purveyors of the Soviet ideology who proved their devotion. In fact, the ideological ‘maturity’ and political ‘literacy’ are the main features that determine the degree of ‘authority’. It is assumed that ‘authoritative person’ is generally older than the primary student, since the ‘person’ represents a certain social stratum of the Soviet social

hierarchy – a pioneer, member of the Komsomol, and communist, – and rarely gets any personalized features. In the post-Soviet textbooks, on the contrary, age is probably the main criterion to determine the degree of ‘authority’, and apparently associates with the scope and quality of life experience. However, in either case, the emphasis is put on the vertical cultural transmission which stability is the guarantor of the stability of socio-cultural community. Only during the Soviet period, the content of this transmission appears to be ‘correct’ ideological orientation, while in the post-Soviet time it gave way to much more abstract ‘folk wisdom’ which, reasoning from the text arrangement, is translated mainly by teachers and older relatives. Thus, if the image of ‘authoritative person’ in the Soviet textbooks is abstract, and requirements translated by requirements are specific, in the post-Soviet textbooks, on the contrary, it is suggested that the child should respect and obey very specific, dear persons (the circle of which is very limited), but the content of information that the child should adopt is rather poorly regulated.

This observation leads us to two topics: first, the problem of cultural regulation of the content of educational influence on the child, and second, the problem of public education and shared responsibility for its outcome. A significant reduction in the scale of educational influence, despite of not quite convincing attempts to make the educational material somewhat more ‘post-figurative’, in the terminology of M. Mid – a direct consequence of variability of life strategies and styles of life, that is, diversity of values which increased/derived from experience during the period of anomie of the Russian at the post-Soviet period.

Accordingly, the ‘big’ society which did not gain a clear understanding of «what is good and what is bad» distanced itself from the education of younger generations abruptly and unexpectedly. The Soviet model of ‘public education’, when every adult person believed himself/herself to be entitled to translate one or another of norms to children on behalf of the ‘Soviet society’, was replaced with the model of ‘parenting’ when only the closest adults are endowed with the responsibility for education of new members of society.

Generally, similar considerations may also be applied to other moral foundations translated by textbook. Thus, in the foundation of ‘loyalty to in-group’ in the Soviet textbooks the term group is used in reference to the Soviet state and the Soviet people. In the post-Soviet textbooks this line remains, but significantly ‘diluted’ with ideas of cohesion of small groups – mostly, family and friends.

However, there is something in common as to determination of groups and mechanisms of establishment and strengthening of group cohesion in the textbooks of different periods, and this is the exclusive principle of formation of group identity oriented to search for enemy and group consolidation in the process of confrontation to «external aggression». Therefore, projective character of this orientation that localizes all possible vague anxieties and

discontents of individuals, and consolidates the group which creates its own image as absolutely infallible one is quite obvious.

The distributive fairness («mutuality») oriented to strengthening of group cohesion which used to dominate in the Soviet textbooks, in the post-Soviet textbook remains, although as a 'neighbour' of the procedural fairness (fairness as adoption of and adherence to the universal rules and regulations).

Thus, the analysis of the content of school textbooks allows us to conclude that the moral sphere of the Russian society is getting more 'individualized'.

The Educational Conceptualisation of the «Ethnic Community (*Volksgemeinschaft*)» in National Socialist Primers by the Example of Presentations of Adolf Hitler – Methodical Prospects*

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ABSTRACT: This contribution is meant to pursue the question of which means of indoctrination and manipulation in the context of education in the primary level of elementary school were developed and employed by National Socialist educationalists in order of educating children towards becoming «fellow Germans (*Volksgenossen*)» who would actively support the German «ethnic community (*Volksgemeinschaft*)». In the focus of the observation there is an analysis of primers, in particular the reconstruction of didactic ways of knowledge communication as well as the topical structure of primers, especially the Presentations of Hitler in National Socialist primers. The way in which Hitler is presented in primers must be seen as belonging to the iconography of the «ethnic community». In this context, a simple description is insufficient, rather the objective of offering imaginations of the «Führer» must be grasped within the context of the legitimacy and affirmation of «charismatic rule».

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Political Propaganda; Germany; XX Century.

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1. «Charismatic rule» and «ethnic community»

In a variety of ways, historiography has interpreted the relationship between Hitler and the Germans as well as its staging and visualisation by the propaganda of the «Third Reich»¹. In this context it is mostly assumed that «Hitler's rule, including the thus connected destructive forces and its destructive dynamics [...] cannot be imagined and explained without the relationship between the 'Führer' and the 'people', between 'Führer' and 'followers'»². For describing this relationship one mostly reaches back to Max Weber's ideal-typically constructed kind of «charismatic rule»³.

Weber had defined rule as an «opportunity» to «make a definable group of people obey specific (or: all) orders», while at the same time pointing out that a certain «interest [...] in obedience» belongs to «any real power relation»⁴. There may be various «motivations for obedience», however they are not sufficient for explaining the constitutive conditions of rule⁵. In this context, in particular the belief in the «legitimacy» of rule and the thus connected «legitimacy claim» must be taken into consideration⁶. If a rule pursues its «legitimacy claim» on the basis of its «charismatic nature», Weber says, it is characterised by «extraordinary devotion to the holiness of heroism or the exemplary character of a person as well as by the orders he reveals or creates»⁷. A person's «charisma» is said to be due to the «extraordinary [...] valid quality of a person, due to which he is considered to [be gifted with] supernatural or super-human or at

¹ See a. o. E. Jäckel, *Hitler und die Deutschen*, in K.D. Bracher, M. Funke, H.-A. Jacobsen (edd.), *Nationalsozialistische Diktatur 1933-1945. Eine Bilanz*, Bonn, Bundeszentrale für Politische Bildung, 1986, pp. 706-720; R. Herz, *Hoffmann & Hitler. Fotografie als Medium des Führer-Mythos*, München, Klinkhardt & Biermann 1994; I. Kershaw, *Hitler 1898-1936*, Stuttgart, Deutsche Verlagsanstalt, 1994; I. Kershaw, *Hitler 1936-1945*, Stuttgart, Deutsche Verlagsanstalt, 2000; U. v. Hehl, *Nationalsozialistische Herrschaft*, 2nd ed., München, Oldenbourg, 2001, pp. 60-66; H.-U. Thamer, S. Erpel (edd.), *Hitler und die Deutschen. Volksgemeinschaft und Verbrechen*, Berlin, Stiftung Deutsches Historisches Museum, 2010.

² H.-U. Thamer, *Die Inszenierung von Macht. Hitlers Herrschaft und ihre Präsentation im Museum*, in Thamer, Erpel (edd.), *Hitler und die Deutschen. Volksgemeinschaft und Verbrechen*, cit., pp. 17-22, in partic. p. 19.

³ See I. Kershaw, *Hitlers Macht. Das Profil der NS-Herrschaft*, München, Dt. Taschenbuch-Verlag, 1992 (3rd ed. 2001); M.R. Lepsius, *Das Modell der charismatischen Herrschaft und seine Anwendbarkeit auf den «Führerstaat» Adolf Hitlers*, in the same, *Demokratie in Deutschland. Soziologisch-historische Konstellationsanalysen. Ausgewählte Aufsätze*, Göttingen, Vandenhoeck & Ruprecht, 1993, pp. 95-118; H.-U. Wehler, *Der Nationalsozialismus. Bewegung, Führerherrschaft, Verbrechen*, München, Beck, 2009, pp. 13-24; Thamer, *Die Inszenierung von Macht. Hitlers Herrschaft und ihre Präsentation im Museum*, cit., pp. 20-22; I. Kershaw, «Führerstaat»: *Charisma und Gewalt*, in Thamer, Erpel (edd.), *Hitler und die Deutschen. Volksgemeinschaft und Verbrechen*, cit., pp. 58-67.

⁴ M. Weber, *Wirtschaft und Gesellschaft. Grundriss der verstehenden Soziologie. Erster Halbband*, Köln, Berlin, Kiepenhauer & Witsch 1964, p. 157.

⁵ *Ibid.*

⁶ *Ibid.*

⁷ *Ibid.*, p. 159.

least specifically extraordinary powers or characteristics which are not open to anybody, or as being God-sent or exemplary, and thus a ‘leader’»⁸. Crucial in this context are not the actual powers, skills and characteristics of this person but their attribution by those being «charismatically ruled»⁹. Insofar, «charisma» must again and again prove its worth by way of a process of «recognition» by the latter.

Thus, a charismatic relationship may be described as a relational relationship, in the context of which the leader claims the right to demand absolute obedience and the subjects are willing to recognise their devotion to the «charismatic leader» as their duty. Mutual recognition constitutes both the «charismatic person» and the subjective and world relations of the subjects. Weber’s statement that interest in obeying is an important precondition for rule can be grasped more exactly from a recognition-theoretical point of view.

Connecting to Judith Butler and Michel Foucault, Norbert Ricken has shown that recognition must be interpreted as a «paradox subjectivation process» «in the context of which the self is both subjected and – precisely this way – only created as a self by the others and by way of others»¹⁰. The necessity of submission for the sake of recognition must be considered a precondition for the process of identity formation happening by the indispensable interplay of looking for affiliation and the attempt to develop one’s own uniqueness. The action context of the recognition relationship makes identity a fiction (Klaus Mollenhauer), as reflecting on the conditions under which recognition happens may at the same time put it in question.

Apart from Weber’s concept of «charismatic rule», the concept of the «ethnic community» may be employed for a description of the structural context of Hitler’s rule¹¹, for the construction and propagandist staging of an «ethnic community» served for keeping up the belief in the legitimacy of «charismatic rule», while at the same time being supposed to secure that it would prove its worth. However, the possibilities and limits of the research concept of the «ethnic community» are debated, in particular the question of in how far the NS regime had to use terror and violence to secure its power and to which

⁸ *Ibid.*, p. 179.

⁹ See *ibid.*

¹⁰ N. Ricken, *Zeigen und Anerkennen. Anmerkung zur Grundform pädagogischen Handelns*, in K. Berdelmann, T. Fuhr (edd.), *Operative Pädagogik. Grundlegung, Anschlüsse, Diskussion*, Paderborn *et al.*, Schöningh 2009, pp. 111-134, in partic. p. 126; See N. Ricken, *The Power of Power – Questions to Michel Foucault*, «Educational Philosophy and Theory», vol. 38, 2006, pp. 541-560, in partic. pp. 553-554.

¹¹ See Lepsius, *Das Modell der charismatischen Herrschaft und seine Anwendbarkeit auf den «Führerstaat» Adolf Hitlers*, cit.; M. Wildt, *Charisma und Volksgemeinschaft*, in «Zeithistorische Forschungen/Studies in Contemporary History», Online Edition, vol. 1, n. 1, 2004, <<http://www.zeithistorische-forschungen.de/site/40208159/default.aspx>> (last access: March 24th, 2014).

extent it could reach back to approval by the people as well as to their readiness to participate in the implementation of the objectives¹².

E. g. Ian Kershaw raises the question of how a «propaganda slogan» could be changed into an «analysis tool» and identifies «considerable problems» if one tries to understand the «ethnic community» as a «mobilising promise of a better future»¹³. Most of all giving evidence to emotional ties and recording a consensus in a dictatorship, he states, are problematic¹⁴. At the same time Kershaw makes the objection against the «ethnic community» that this way one assumes «the absolute rule of one single identity»¹⁵, thus leaving ways of turning away and criticism of the regime as well as approaches at overcoming it out of consideration¹⁶.

Other than Kershaw and connecting to Alf Lüdtke, Michael Wildt believes the concept of the «ethnic community» to be significant because it must be «analysed as a social practice» and most of all the processes and «practices of creating it» must be considered¹⁷.

It is precisely about the variety of ways of behaviour, of both joining in and turning away, readiness and refusal, readiness to adjust and enthusiasm, distancing oneself and

¹² See I. Kershaw, «Volksgemeinschaft». *Potenzial und Grenzen eines neuen Forschungskonzepts*, «Vierteljahrhefte für Zeitgeschichte», vol. 59, 2011, pp. 1-17; M. Wildt, «Volksgemeinschaft». *Eine Antwort auf Ian Kershaw*, «Zeithistorische Forschungen/Studies in Contemporary History», Online Edition, vol. 8, n. 1, 2011, <<http://www.zeithistorische-forschungen.de/16126041-Wildt-1-2011>> (last access: March 24th, 2013); D. Schmiechen-Ackermann, «Volksgemeinschaft». *Mythos der NS-Propaganda, wirkungsmächtige soziale Verheißung oder soziale Realität im «Dritten Reich»? Einführung*, in D. Schmiechen-Ackermann (ed.), «Volksgemeinschaft». *Mythos, wirkungsmächtige soziale Verheißung oder soziale Realität im «Dritten Reich»? Zwischenbilanz einer kontroversen Debatte*, Paderborn et al., Schöningh, 2012, pp. 13-54, in partic. pp. 17-34.

On the current state of research see the overviews by Schmiechen-Ackermann, «Volksgemeinschaft». *Mythos, wirkungsmächtige soziale Verheißung oder soziale Realität im «Dritten Reich»? Zwischenbilanz einer kontroversen Debatte*, cit. and by D. v. Reeken, M. Thießen, «Volksgemeinschaft» als soziale Praxis? *Perspektiven und Potenziale neuer Forschungen vor Ort*, in D. v. Reeken, M. Thießen (edd.), «Volksgemeinschaft» als soziale Praxis. *Neue Forschungen zur NS-Gesellschaft vor Ort*, Paderborn et al., Schöningh, 2013, pp. 11-33.

¹³ Kershaw, «Volksgemeinschaft». *Potenzial und Grenzen eines neuen Forschungskonzepts*, cit., p. 9; see H. Mommsen, *Forschungskontroversen zum Nationalsozialismus*, «Aus Politik und Zeitgeschichte», vol. 57, n. 14-15, 2007, pp. 14-21, in partic. 19-20.

¹⁴ Kershaw, «Volksgemeinschaft». *Potenzial und Grenzen eines neuen Forschungskonzepts*, cit., pp., 9-10.

¹⁵ *Ibid.*, p. 12.

¹⁶ See *ibid.*, p. 10. On dealing with criticism of the concept of the «ethnic community» see Schmiechen-Ackermann, «Volksgemeinschaft». *Mythos, wirkungsmächtige soziale Verheißung oder soziale Realität im «Dritten Reich»? Zwischenbilanz einer kontroversen Debatte*, cit., p. 32; Wildt, «Volksgemeinschaft». *Eine Antwort auf Ian Kershaw*, cit., Sect. 1; M. Wildt, «Volksgemeinschaft». *Eine Zwischenbilanz*, in Reeken, Thießen (edd.), «Volksgemeinschaft» als soziale Praxis. *Neue Forschungen zur NS-Gesellschaft vor Ort*, cit., pp. 355-369.

¹⁷ Wildt, «Volksgemeinschaft». *Eine Antwort auf Ian Kershaw*, cit., Sect. 4.

‘counteracting the Führer’ when ethnic community’ is analysed as a social practice. It is precisely about breaking up the suggestion of the homogeneity of the ‘ethnic community’¹⁸.

2. Education towards the «ethnic community» and the aestheticisation of violence

At the same time the focus on the concept of the «ethnic community» as a social practice requires that also the realm of National Socialist education must be considered, to then ask how, by way of educational practice within the tension area of disciplining, formation, event orientation and fascination, one tried to constitute «ethnic community» among the generations and by help of which means the limits between inclusion and exclusion were determined within the educational realm. Describing NS education as a kind of violent behaviour which is not educational would be insufficient. Rather, the educational practice must be considered by its ambivalence, by the «parallelity of coercion and freedom», to this way be able to also grasp the «variance of effects [...] between being overwhelmed, approval and distance»¹⁹. At the same time, National Socialist education must always be considered within the context of preparing for potential violence – it must be considered an education towards violence.

Crucial for a description of National Socialist education as an education towards violence is an extension of the historical perspective, to be able to describe the manifestations of violent behaviour beyond the recording of brutal physical violence, thus taking processes of covering as well as establishing culturally determined approval in the sense of overcoming oneself or alienating oneself from oneself. In this context, following Tenorth we must assume that violence «[is...] systematically inherent with the analysed phenomena and processes, both physically and psychically, personally and organisationally»²⁰.

In contrast to Tenorth, however, who distinguishes latent and manifest violent behaviour²¹, it must be objected that violent behaviour always becomes manifest in a certain way, both concerning the process of educational practice and its effect on those being educated. Violence is in principle of an instrumental nature²². Also defining the concept of violent behaviour as «coercion» and «threatening physical integrity», which evade both any «historical legitimation and the approval of the addressee»²³ is dubious when it comes to analysing

¹⁸ *Ibid.*, Sect. 5; see Wildt, «Volksgemeinschaft». *Eine Zwischenbilanz*, cit.

¹⁹ H.-E. Tenorth, *Pädagogik der Gewalt. Zur Logik der Erziehung im Nationalsozialismus*, «Jahrbuch für Historische Bildungsforschung», vol. 9, 2003, pp. 7-36, in partic. p. 20.

²⁰ *Ibid.*, p. 12.

²¹ See *ibid.*

²² See H. Arendt, *Macht und Gewalt*, 3rd ed., München, Piper 1975, pp. 56, 79.

²³ See Tenorth, *Pädagogik der Gewalt. Zur Logik der Erziehung im Nationalsozialismus*, cit.,

violence against children, in particular regarding the constitutive function of «refusing approval»²⁴. As educational practice is at first based on the tension between heteronomy and autonomy and requires an interpretation of the world by the older generation, the capability to approve of those being educated is only developed. In this context, educational practice is legitimated by way of the child's moral status and is based on assuming its particular vulnerability and need for protection²⁵. Accordingly, the question of how violence in the context of educational practice must be described can only be answered if it is clear in how far the older generation functionalises the child's vulnerability for enforcing its own interests and abuses the aspect of care and protection for the creation of dependencies and heteronomous approval²⁶. Thus it must be analysed how violence in the inter-generational relationship becomes manifest in the sense of an «avoidable attack on human basic needs»²⁷ and how violent behaviour is educationally transformed and aestheticized.

The aestheticisation of violence becomes obvious most of all by the fact that «the educational release towards autonomy [...] is replaced on the one hand by the aestheticisation of the 'total' formation and on the other by educationally legitimated 'utilisation ethics'»²⁸. In this context, giving up on freedom in favour of the «ethnic community» was presented as something beautiful and worthwhile, and the identity formation of the individual child – by way of functionalising and aestheticizing the «will to grow up» – was oriented at the collective identity of the community ideology. Thus, the children believed the «ethnic community» to be a matter-of-course order of affiliation to which they were «made used» step by step and where they found recognition²⁹.

Accordingly, education towards the «ethnic community» was shaped within the frame of «educational moratoriums», i.e. starting out from a discursively

p. 11.

²⁴ Apart from this, the concept of «physical integrity» must be located in the context of the debate on the social construction of corporeality and physicalness, on the relation of body and mind within the tension area of attributing the nature of being a subject or an object (see e. g. T. Alkemeyer, *Körperwissen*, in A. Engelhardt, L. Kajetzke (edd.), *Handbuch Wissensgesellschaft. Theorien, Themen und Probleme*, Bielefeld, transcript 2010, pp. 293-308).

²⁵ See J. Giesinger, *Autonomie und Verletzlichkeit. Der moralische Status von Kindern und die Rechtfertigung von Erziehung*, Bielefeld, transcript 2007, pp. 24-25.

²⁶ See J. Giesinger, «Wie kultiviere ich die Freiheit bei dem Zwange?» *Zu Kants Pädagogik*, «Pädagogische Rundschau», vol. 65, 2011, pp. 259-270, in partic. p. 264.

²⁷ J. Galtung, *Gewalt*, in Ch. Wulf (ed.), *Vom Menschen. Handbuch historische Anthropologie*, Weinheim, Basel, Beltz, 1997, pp. 913-919, in partic. p. 913.

²⁸ C. Heinze, K.-P. Horn, *Zwischen Primat der Politik und rassentheoretischer Fundierung – Erziehungswissenschaft im Nationalsozialismus*, in K.-P. Horn, J. W. Link (edd.), *Erziehungsverhältnisse im Nationalsozialismus – Totaler Anspruch und Erziehungswirklichkeit*, Bad Heilbrunn, Klinkhardt 2011, pp. 319-339, in partic. p. 327.

²⁹ See C. Heinze, *The discursive construction and (ab)uses of a «German childhood» in primers during the time of national socialism 1933-1945*, «Paedagogica Historica», vol. 48, 2012, pp. 169-183, in partic. pp. 177-182; see P. Reichel, *Der schöne Schein des Dritten Reiches. Faszination und Gewalt des Faschismus*, Frankfurt am Main, Fischer 1993.

constructed image of the «German child» the older generation defined the child's need in accordance with the realisation of the idea of an «ethnic community», on the basis of which the development of ways of institutionally «processing» these needs was supposed to happen. Based on such an «inter-generational order»³⁰, at the same time the moratorium concept was connected to giving reason to postponing (violent) participation in the «ethnic community» as well as to conceptualising the educational implementation of the formation process. Assuming that «Hitler's legitimacy and its charismatic core» must be considered a system of rule which was capable of manipulating the criteria «according to which charisma had to prove its worth»³¹ also raises the question about the educational-didactic transformation of «charismatic rule». In this context it is of interest how already children could be made to believe in Hitler's legitimacy, in which way Hitler was staged as a «charismatic leader» and by help of which methodical concepts the recognition of this «charisma» was initiated.

Both for presenting the National Socialist ideology and for securing and legitimating their rule, the National Socialists tried to open up access to the imagination of the «fellow Germans (*Volksgenossen*)», by way of images which were supposed to present the ideological concepts. As part of the staging process, the images of «charismatic rule» combine «the extraordinary qualities of the saviour and redeemer with the person of Adolf Hitler»³². In this context, the way in which the image of the «Führer» – here in the sense of an imaginary idea – is communicated depends on the moratorium concept of each «German child». The goal was to step by step integrate the children into the «ethnic



Pic. 1. Adolf Hitler in the primer «Wir Kinder», cit., p. 14.

³⁰ See L. Alanen, *Generational Order*, in J. Overtrup, A. Corsaro, M.-S. Honig (edd.), *The Palgrave Handbook of Childhood Studies*, Houndmills et al., Palgrave 2009, pp. 159-174; D. Bühler-Niederberger, *Lebensphase Kindheit. Theoretische Ansätze, Akteure und Handlungsräume*, Weinheim, München, Juventa 2011, pp. 214-223.

³¹ Lepsius, *Das Modell der charismatischen Herrschaft und seine Anwendbarkeit auf den «Führerstaat» Adolf Hitlers*, cit., p. 118.

³² Thamer, *Die Inszenierung von Macht. Hitlers Herrschaft und ihre Präsentation im Museum*, cit., p. 20.

community» and to prepare them for their active participation in the future. This required the construction of a child-appropriate «Führer» image and relationship which enabled for transformation into the «fellow Germans'» future loyalty relationship to the «Führer». Crucial in this context was that, during the process of educational-didactic elementarisation, the concept of «charismatic rule» was not explicitly put into question or that the National Socialist was indeed not made a laugh.

3. *Presentations of Hitler in National Socialist primers – state of research and methodical approaches*

Previous research on the way in which Hitler is presented in primers deals with the «Führer cult» only in passing³³. Still, studies based on extensive bodies of primers are an exception³⁴.

Gisela Teistler's analysis of the «Führer cult» in the «Third Reich» is based on 127 primers, 82 of which include images of Hitler (about 70%)³⁵. Based on a text-immanent analysis, the various motifs are roughly topically analysed according to the following categories: «Der Führer zum Anfassen (The Führer

³³ These studies deal with Hitler images by way of rather small bodies of primers, together with other presentations of the NS ideology (see u. M. Nitsch, «*Fein marschieren und singen...*». *Neue Identifikations-, Handlungs- und Bindungsangebote in deutschen Fibeln aus den Jahren 1933 bis 1943*, in G. Teistler (ed.), *Lesen lernen in Diktaturen der 1930er und 1940er Jahre. Fibeln in Deutschland, Italien und Spanien*, Hannover, Hahn, 2006, pp. 107-130), in partic. pp. 118-120; W. Kissling, *Österreichs Langzeitfibel «Wir lernen lesen» als Gegenstand der Revision im Nationalsozialismus. Ein Textvergleich der Ausgaben 1926 und 1940*, in Teistler (ed.), *Lesen lernen in Diktaturen der 1930er und 1940er Jahre. Fibeln in Deutschland, Italien und Spanien*, cit., pp. 155-174; P. Malina, «*Land der Berge, Land der Döme?*» *Österreichische Erstlesefibeln in Zeiten politischer Systemveränderung*, in Teistler (ed.), *Lesen lernen in Diktaturen der 1930er und 1940er Jahre. Fibeln in Deutschland, Italien und Spanien*, cit., pp. 175-190. Studies on the «Führer cults» of other countries exist a. o. for Italy (see L. Cajani, «*I bimbi d'Italia son tutti Balilla*». *Die Kinder Italiens sind alle Balilla. Politische Erziehung in den Fibeln des faschistischen Italiens*, in Teistler (ed.), *Lesen lernen in Diktaturen der 1930er und 1940er Jahre. Fibeln in Deutschland, Italien und Spanien*, cit., pp. 191-215) as well as for Spain (see R. V. Montés, *Gott, Vaterland, Reich und Miliz. Die politische Sozialisation in den Fibeln der ersten Jahre der Franco-Diktatur (1936-1951)*, in G. Teistler (ed.), *Lesen lernen in Diktaturen der 1930er und 1940er Jahre. Fibeln in Deutschland, Italien und Spanien*, cit., pp. 217-226). On dealing with the state of research on primers in National Socialism see Heinze, *The discursive construction and (ab)uses of a «German childhood» in primers during the time of national socialism 1933-1945*, cit.

³⁴ See G. Teistler, *Von der Kaiserverehrung zum Führerkult. Personenkult in Fibeln der Kaiserzeit und im Dritten Reich*, «*Internationale Schulbuchforschung*», vol. 19, n. 3, 1997, pp. 285-304; J. Thiele, *Der Beitrag der Fibeln des Dritten Reiches zur Vermittlung der nationalsozialistischen Ideologie. Eine kritische Analyse ihrer Inhalte*, Diss. Univ. Oldenburg, <urn:nbn:de:gbv:715-oops-1831>, <<http://oops.uni-oldenburg.de/volltexte/2005/183/>> (last access: March 24th, 2014).

³⁵ See Teistler, *Von der Kaiserverehrung zum Führerkult. Personenkult in Fibeln der Kaiserzeit und im Dritten Reich*, cit., p. 293. 62 texts, 40 pictures and 24 poems.

– touch and feel)»³⁶, «Gott schütze den Führer (God save the Führer)»³⁷ and «Hör, der Führer spricht (Listen, the Führer speaks)»³⁸. An overview is given according to these categories, in the context of which, however, it becomes obvious that the suggested categories must be further differentiated.

Teistler interprets each image in the context of «adjustment and submission»³⁹ and while referring to exercising «serving devotion to and absolute identification with the figure of the ruler»⁴⁰. However, this way the differences between the «images of the Führer» in the various primers as well as their relation to the iconography of the ethnic community are not reflected on⁴¹.

Jan Thiele in his study on the «contribution of primers in the Third Reich to the communication of National Socialist ideology» (2005) analysed the image of the «Führer», among others. Based on a category-guided qualitative content analysis of 124 primers, the frequency of the respective qualitative image and text appearances is determined by way of a frequency analysis⁴². The analysis is based on the reconstruction of «basic motifs» by way of which Hitler is presented in speeches by Joseph Goebbels on the occasion of the *Führergeburtstag* (the Führer's birthday)⁴³. On the whole, in the body analysed by Thiele Hitler is presented by 86 primers, which makes a share of 69.35%⁴⁴.

The analysis offers quite an incoherent image of the «Führer», although presenting Hitler «as the children's friend» makes the biggest share, with 29.83% of primers⁴⁵. Further ways of presenting Hitler as distinguished by Thiele are the «serious, strict Führer» (11.29%), «the one who made Germany strong and powerful again» (10.48%), «Hitler – sent by God» (6.45%), «the courageous war hero» (4.03%) as well as «the animal lover» (2.24%). At a different topical level there is a category for which a way in which Hitler wished to be characterised was decisive: He «wants nobody to be hungry and cold» (8.06%). Furthermore, two other categories are formed, focusing on his relation to children: «the children's duty to help with the *Winterhilfswerk* (Winter Relief) in the name of the Führer» (9.68%) as well as other «things Hitler demanded from the children» (4.03%).

³⁶ *Ibid.*, p. 293.

³⁷ *Ibid.*, p. 295.

³⁸ *Ibid.*

³⁹ *Ibid.*, p. 294.

⁴⁰ *Ibid.*, p. 295.

⁴¹ On such a location see exemplarily Kissling, *Österreichs Langzeitfibel «Wir lernen lesen» als Gegenstand der Revision im Nationalsozialismus. Ein Textvergleich der Ausgaben 1926 und 1940*, cit., p. 165.

⁴² Thiele, *Der Beitrag der Fibel des Dritten Reiches zur Vermittlung der nationalsozialistischen Ideologie. Eine kritische Analyse ihrer Inhalte*, cit., p. 117.

⁴³ *Ibid.*, p. 139; see E.K. Bramsted, *Goebbels und die nationalsozialistische Propaganda. 1925-1945*, Frankfurt am Main, Fischer 1971.

⁴⁴ Thiele, *Der Beitrag der Fibel des Dritten Reiches zur Vermittlung der nationalsozialistischen Ideologie. Eine kritische Analyse ihrer Inhalte*, cit., p. 166.

⁴⁵ On the following figures see *ibid.*, pp. 166-168.

By his study Thiele is the first to quantify the different degrees to which the Hitler image is presented by primers. Concerning the topical structure, however, he mostly stays at the level of the respective depicted or presented content, thus running the danger of interpreting the pages of textbooks as reflections or representations of the National Socialist ideology. Precisely in the realm of educational practice it is necessary to consider the educational-didactic transformation of socio-cultural knowledge into specifically elementarised subjects and, furthermore, to consider them in the context of the social-political development.

Now, what are the methodical consequences resulting from the analysis of the «Hitler image» in National Socialist primers?

1. Presenting Hitler in the primers must be understood as part of the iconography of the «ethnic community»⁴⁶. The images in the primers do not at all work as a «depiction» or «mirror» of National Socialist society but serve for ideologically staging an interpretation of the world which was communicated to the children in the context of the reading course, and they were supposed to be appropriated by them⁴⁷. Here, simply describing the images can only be a starting point. Furthermore, however, it is necessary to grasp the programme of imagining the «Führer» in the context of legitimacy and of «charismatic rule» proving its worth, as it could not be about «telling the myths of NS propaganda a second time» but about, by way of appropriate contextualisation, presenting them by their «manipulating function and production»⁴⁸. This demand can be transferred to the analysis of the multi-modal design of image-text units in National Socialist primers where, by way of the mutual attribution of meaning to text and image elements, there happens the construction of meaning contexts⁴⁹.

2. In this context, one essential precondition for «charismatic rule» proving its worth was the successful reconstruction – according to the intentions of the

⁴⁶ See a. o. C. Fuhrmeister, *Ikongrafie der «Volksgemeinschaft»*, in Thamer, Erpel (edd.), *Hitler und die Deutschen. Volksgemeinschaft und Verbrechen*, cit., pp. 94-103; C. Schmölders, *Hitlers Gesicht*, in Thamer, Erpel (edd.), *Hitler und die Deutschen. Volksgemeinschaft und Verbrechen*, cit., pp. 36-42; H.-U. Thamer, *Macht und Wirkung nationalsozialistischer Bilder. In Bilder im Kopf. Ikonen der Zeitgeschichte*, Köln, DuMont Literatur- u. Kunstverlag, 2009, pp. 18-29; M. Loiperdinger, R. Herz, U. Pohlmann (edd.), *Führerbilder. Hitler, Mussolini, Roosevelt, Stalin in Fotografie und Film*, München, Piper, 1995; Herz, *Hoffmann & Hitler. Fotografie als Medium des Führer-Mythos*, cit.

⁴⁷ On the criticism of an approach of historical textbook research which considers the textbook a «mirror» of societal developments see C. Heinze, *Historical Textbook Research: Textbooks in the Context of the «Grammar of Schooling»*, «Journal of Educational Media, Memory, and Society», vol. 2, 2010, pp. 122-131.

⁴⁸ Thamer, *Die Inszenierung von Macht. Hitlers Herrschaft und ihre Präsentation im Museum*, cit., p. 18; see the same, *Macht und Wirkung nationalsozialistischer Bilder. In Bilder im Kopf. Ikonen der Zeitgeschichte*, cit.

⁴⁹ See C. Kühberger, *Multimodale Narration. Bild-Text-Graphik-Kommunikation in Schulgeschichtsbüchern*, in C. Heinze, E. Matthes (edd.), *Das Bild im Schulbuch*, Bad Heilbrunn, Klinkhardt, 2010, pp. 43-55.

rulers – of these offers of interpretation and their recognition by the pupils. For the analysis this means that the child-appropriate elementarisation of subjects as happening by the educational-didactic transformation process must again be located within the appropriate knowledge order, so that the objectives and conditions of the didactic processing of knowledge as well as the legitimation of the choice of contents become obvious. Thus, for the analysis the meaning context of each text-image element must be considered and it must be presented regarding the historically-culturally influenced «culture of looking»⁵⁰.

At the same time, the focus of interest is on the reconstruction of the possibilities to interpret as they result from the way in which «familiar symbolic-aesthetic» elements⁵¹ are presented as well as from how each context is adjusted at the same time. For this purpose it is necessary to consider the primers in the context of their production and use and to grasp the conditions and influences which were important for designing primers in National Socialism. By the «grammar for schooling» model discourse-theoretically oriented textbook research is provided with a set of methodical tools, as teaching is analysed within the context of the «grammar of schooling»⁵² and the textbook is considered an element of this comparably stable structural context⁵³.

3. In the primers, presenting the «ethnic community» is connected to the educational-didactic claim that in the future the children will recognize this staged interpretation of the world as their action orientation. Initially, constituting affiliation was in the focus of interest, which must, however, be understood as a preparation for and initiation of violent behaviour⁵⁴. Accordingly, for

⁵⁰ See K. Mollenhauer, *Konjekturen und Konstruktionen. Welche ‚Wirklichkeit‘ der Bildung referieren Dokumente der Kunstgeschichte? – Eine bildungstheoretische Reflexion im Anschluss an Svetlana Alpers*, in D. Kunzen (ed.), *Pädagogik und Geschichte. Pädagogische Historiographie zwischen Wirklichkeit, Fiktion und Konstruktion*, Weinheim, Deutscher Studienverlag, 1993, pp. 25-42, in partic. pp. 25-27.

⁵¹ Thamer, *Macht und Wirkung nationalsozialistischer Bilder. In Bilder im Kopf. Ikonen der Zeitgeschichte*, cit., p. 2.

⁵² D. Tyack, W. Tobin, *The «Grammar» of Schooling: Why Has it Been so Hard to Change?*, «American Educational Research Journal», vol. 31, 1994, pp. 453-479; L. Cuban, *How Teachers Thought: Constancy and Change in American Classrooms, 1880-1990*, 2nd ed., New York, London, Teachers College Press, 1993.

⁵³ A detailed description of this approach would go beyond the scope of this contribution. On the state of research and the concept see Heinze, *Historical Textbook Research: Textbooks in the Context of the «Grammar of Schooling»*, cit.

⁵⁴ See M. Schwerendt, «Trau keinem Fuchs auf grüner Heid, und keinem Jud bei seinem Eid». *Antisemitismus in nationalsozialistischen Schulbüchern und Unterrichtsmaterialien*, Berlin, Metropol-Verlag, 2009, p. 333; Tenorth, *Pädagogik der Gewalt. Zur Logik der Erziehung im Nationalsozialismus*, cit., p. 29; C. Heinze, «Wir wollen deutsche Kinder sein». *Die Fibel im Nationalsozialismus zwischen Kindorientierung, Erziehung zur Volksgemeinschaft und Lesenlernen*, in the same, *Das Schulbuch im Innovationsprozess. Bildungspolitische Steuerung – Pädagogischer Anspruch – Unterrichtspraktische Wirkungserwartungen*, Bad Heilbrunn, Klinkhardt, 2011, pp. 129-184; F. Pfalzgraf, *Ausländer, Fremde(s) und Minderheiten in deutschen Fibern 1933-1945, «Muttersprache»*, vol. 121, 2011, pp. 161-192.

the analysis it must be taken into consideration that behind the mask of an «iconography of the ethnic community» the National Socialist dictatorship hid violence which could be unleashed towards anybody at any given time⁵⁵. This practice of manipulative stylization and disguise requires that always also the exclusion of knowledge coming along with the selection and legitimation of certain contents must be taken into consideration.

4. The ways in which Hitler is presented in the primers may be understood as specific interpretations of the inter-generational relationship within the «ethnic community». Accordingly, both the construction of the relationship between Hitler and the children in the primers and its communication to the pupils must be interpreted as a process of «generational ordering»⁵⁶. One precondition for this was referring to a moratorium concept for the «German child» by way of which the «serious side of life» in the sense of participating in the «ethnic community» was still postponed for the children. Apart from this, however, they were increasingly told to go beyond the limits of the moratorium, and they were playfully introduced to the «normality» of the «ethnic community»⁵⁷. This goal essentially influenced the educational-didactic design of primer contents.

5. To be able to appropriately reconstruct the various ways in which Hitler appeared in the primers, there must be a combination of qualitative and quantitative approaches. On the one hand, the essential interpretation patterns of the primers must be grasped by way of a category-guided method and depicted by their quantitative nature, based on an analysis of their statements⁵⁸. On the other hand it is necessary to contextualise these interpretation patterns and to sketch the epistemological transformation process by way of case studies.

For the qualitative reconstruction it must be noted that those images of the «Führer» as previously being worked out by research cannot simply be transferred to the primers in the sense of a hypothesis assessing method. Rather,

⁵⁵ See R. Bessel, *Eine «Volksgemeinschaft» der Gewalt*, in Schmiechen-Ackermann (ed.), «Volksgemeinschaft». *Mythos, wirkungsmächtige soziale Verheißung oder soziale Realität im «Dritten Reich»?*, cit., pp. 357-360; Thamer, *Die Inszenierung von Macht. Hitlers Herrschaft und ihre Präsentation im Museum*, cit., p. 17; E. Hennig, *Hitler-Porträts abseits des Regierungsalltags. Einer von uns und für uns?*, in Loiperdinger, Herz, Pohlmann (edd.), *Führerbilder. Hitler, Mussolini, Roosevelt, Stalin in Fotografie und Film*, cit., pp. 27-50, in partic. p. 44; Reichel, *Der schöne Schein des Dritten Reiches. Faszination und Gewalt des Faschismus*, cit.

⁵⁶ See D. Bühler-Niederberger, *Einleitung. Der Blick auf das Kind gilt der Gesellschaft*, in the same (ed.), *Macht der Unschuld. Das Kind als Chiffre*, Wiesbaden, VS Verlag für Sozialwissenschaften, 2005, pp. 9-22, in partic. p. 10; the same, *Lebensphase Kindheit. Theoretische Ansätze, Akteure und Handlungsräume*, cit., pp. 214-223; C. Heinze, *Nützlich Wissen. Untertanengeist und Gottesfurcht. Zur Konstruktion von Kindheit in preußischen Volksschullesebüchern*, in M. Winzen (ed.), *Kindheit. Eine Erfindung des 19. Jahrhunderts*, Oberhausen, Athena, 2013, pp. 173-194, in partic. pp. 173-174.

⁵⁷ See Heinze, «Wir wollen deutsche Kinder sein». *Die Fibel im Nationalsozialismus zwischen Kindorientierung, Erziehung zur Volksgemeinschaft und Lesenlernen*, cit., pp. 157-160.

⁵⁸ See R. Keller, *Diskursforschung. Eine Einführung für SozialwissenschaftlerInnen*, 4th ed., Wiesbaden, VS Verlag für Sozialwissenschaften 2011, pp. 108-110.

at first the reference contexts of the individual image-text elements must be reconstructed and the process of elementarisation must be considered within the context of the knowledge order. Furthermore, the staging of the «Führer» in the primers must be considered an interpretation of the construct of the «ethnic community» by the authors.

The following analysis-guiding questions can be derived from these methodical preliminary considerations:

Which interpretation offers are made to the children in the context of staging the «ethnic community»? On which moratorium concept is the presentation based? Which image of Hitler is staged in the primers, and in how far do the authors reach back to those images of Hitler as being used by the official propaganda? What kind of relationship between Hitler and the children is supposed to be constituted? In which way are those criteria according to which charismatic rule is supposed to prove its worth inter-generationally communicated and reproduced? How is the educational-didactic stimulation for a reproduction of the discourse methodically shaped? For making the children used to the order of affiliation, do the authors reach back to certain ways of aestheticizing violence? How significant is the way in which Hitler is presented within the overall context of the respective primer?

4. Case example: Presenting Hitler in the primer «*Wir Kinder (We Children)*» (1935)

In the following, the programme of presenting Hitler shall be demonstrated by the example of a selected image-text unit⁵⁹. Doing so, we will focus on the educational-didactic transformation of the inter-generational relationship between Hitler and the children within the context of the ethnic community. Regarding further contextualisation, we point out to the study by C. Heinze (2011) on the ideologisation of learning how to read⁶⁰. Whereas with the iconography of the ethnic community the staging of «submission rituals»⁶¹ is predominant, here Hitler is presented as a loving and caring man, and a situation of closeness between Hitler and children is arranged. He encounters them as a friendly, smiling man. The two girls and one boy are looking up trustingly to Hitler, he is leaning towards them while stroking one girl's head. When dealing with the depicted event of the «primer heroes», the school children perceive

⁵⁹ See *Wir Kinder. Erstes Lesebüchlein für die althayrischen und schwäbischen Volkshauptschulen*, 2nd ed., arranged by Ch. Keller, B. Reinlein, H. Stanglmaier, pictures by M. Wolfinger. München, Max Kellner [1935], p. 14. See picture n. 1.

⁶⁰ See Heinze, «*Wir wollen deutsche Kinder sein*». *Die Fibel im Nationalsozialismus zwischen Kindorientierung, Erziehung zur Volksgemeinschaft und Lesenlernen*, cit.

⁶¹ Herz, *Hoffmann & Hitler. Fotografie als Medium des Führer-Mythos*, cit., p. 214.



Pic. 2. Adolf Hitler together with children at the Obersalzberg (Hoffmann, *Jugend um Hitler. 120 Bilddokumente aus der Umgebung des Führers*, cit., page not numbered).

children of their age who are constituted as «German children» experiencing something extraordinary: they are meeting the Führer. They honour him by donating a bunch of flowers and receive recognition in return.

This presentation gives up on all insignia of power and symbols of the Third Reich. Hitler wears a suit and not a uniform, and he is presented to the children in a familiar environment⁶². As this primer was designed for Bavarian and Swabian primary schools, in the background we see a traditional wooden house behind which snow covered mountains are towering. According to this regional context, Hitler wears an edelweiss on his lapel. The children wear traditional clothing and are not depicted as members of any NS youth organisation.

Previous research filed this image under the category of «Hitler as the friend of the children», which is problematic in

two respects. On the one hand, the manipulative staging of such an image of Hitler is not taken into consideration, on the other the intended transformation process of the inter-generational relationship into a loyalty relationship cannot be grasped. Thus, for a more detailed description it is necessary to consider the staging of the «Führer» within the context of the child's innocence, and

⁶² In the period of National Socialism there was an intensive debate about the question if, concerning the design of primers, they should rather be oriented at the respective region or if there should be one, binding primer for all children. Basically, one kept the regional nature of the primers. Accordingly, there was quite a variety of primers. Of the 424 primers published in the period of National Socialism (incl. revised editions and reprints), 80 alone are based on editions which had been published for the first time before 1933. Furthermore, there were 110 reprints of these 80 editions (N. Alpert, G. Teistler, *Zwischen Kaiserreich und NS-Regime: Langlebige Fibelwerke in Perioden politischer Umbrüche*, in Teistler (ed.), *Lesen lernen in Diktaturen der 1930er und 1940er Jahre. Fibeln in Deutschland, Italien und Spanien*, cit., pp. 279-285). Philipp Bouhler's attempt to implement his concept of a «Reichseinheitsfibel (one standard primer for the entire Reich)» in late 1944, in the context of the «Reichsstelle für das Schul- und Unterrichtsschrifttum (Reich Authority for School and Teaching Literature)» established by Hitler, could not be implemented anymore (on the education-political context see Heinze, «*Wir wollen deutsche Kinder sein*». *Die Fibel im Nationalsozialismus zwischen Kindorientierung, Erziehung zur Volksgemeinschaft und Lesenlernen*, cit., pp. 137-145).

furthermore it must be taken into consideration that the children are told to state their loyalty to Hitler in a way which is appropriate to their age.

If we look at the text accompanying the image, now at the latest the violent nature of the inter-generational relationship becomes obvious, which aims at lasting dependence. The nature of the relationship between Hitler and the children is expressed by a kind of proposition: «Adolf Hitler loves children. We love him, too. We give him flowers and shout Heil Hitler! We wish him a long life.» By testifying their childish love to Hitler, by their greeting and by putting the wish into their mouths that Hitler shall have a long life it becomes obvious that from this unreserved trust in Hitler there shall result unconditioned loyalty. Loving the «Führer» must be understood as love until death.

However, in the context of the moratorium the inclusion of the «German child» into the loyalty relationship to the Führer is postponed. Hitler's relationship to children is arranged as being «intimate», in the context of which the otherwise, in the context of the «submission rituals»⁶³, established distance between the exposed «Führer» and the people, who are formed to marching masses, is dissolved. Thus, the here worked out motif cannot be understood without Hitler's «adamant» and «decided» attitude when it comes to implementing his inhuman ideology.

The here depicted «Führer» motif is often used in the context of the iconography of the ethnic community. It can be attributed to a group of motifs where Hitler is presented in the above described way together with children in regional contexts, while staging in most cases the «bonds of trust» between the Führer and the children, together with attributes of «love» and «trust»⁶⁴. A selection of such images is found in the picture book edited by Heinrich Hoffmann in 1934, «Jugend um Hitler (Young People around Hitler)». The image of Hitler from the primer «Wir Kinder» is probably a variation of that photo which shows Hitler with two girls and a boy against a mountain background at the Obersalzberg⁶⁵.

By a comparison to the common visualisation practice, those photographs showing Hitler together with children make quite a different perspective visible: The focus of the programme of these images is the perfidious staging of a ruler whose alleged decency and peacefulness is supposed to be documented most of

⁶³ Herz, *Hoffmann & Hitler. Fotografie als Medium des Führer-Mythos*, cit., pp. 214-241.

⁶⁴ See *ibid.*, pp. 244-252; Hennig, *Hitler-Porträts abseits des Regierungsalltags. Einer von uns und für uns?*, cit. See also the practice of «emotional indoctrination» under the Franco regime by K. Mahamad Angulo, *Emotion and sentiment in the pedagogical discourse on primary education during the Franco regime: a strategic counterattack to the legacy of the past*, «History of Education & Children's Literature», vol. VIII, n. 2, 2013, pp. 333-355.

⁶⁵ See H. Hoffmann, *Jugend um Hitler. 120 Bilddokumente aus der Umgebung des Führers. Aufgenommen, zusammengestellt und hrsg. v. Heinrich Hoffmann Reichsbildberichterstatter der NSDAP. Mit einem Geleitwort von Baldur von Schirach Jugendführer des Deutschen Reiches* (1.-30. Tsd.). München, «Zeitgeschichte» 1934, no page no. See picture n. 2.

all by showing his affection to children and animals⁶⁶. In particular the depiction of the children's innocence is instrumentalised to stylise Hitler as being human and close to the people.

In his book «Mein Kampf» Hitler had unmistakably expressed his demands for the way in which the inter-generational relationship should be organised, by demanding that «the entire educational work of the völkische state must be crowned by [...] [branding] the sense of the race and the feeling of the race [into] the brains and hearts of the youth which is entrusted to it»⁶⁷. By Hitler's metaphor of «branding in» there focuses the violent educational claim of the Third Reich which, however, is for the start veiled by the aestheticizing staging of the «ethnic community». The first step into this direction was the event-oriented development of a positive emotional basic mood and of a feeling of being protected. Accordingly, the essential goal of the here analysed image may be described as staging «trust» and creating community, to then, based on this relationship, step by step transform it into a loyalty relationship to the «Führer». At the same time, the criteria for the recognition of «charismatic rule» are transformed, and Hitler is elevated from being the «friendly Führer» to being the «saviour», «redeemer» and «charismatic Führer» of the German people⁶⁸.

⁶⁶ See Herz, *Hoffmann & Hitler. Fotografie als Medium des Führer-Mythos*, cit., p. 242.

⁶⁷ A. Hitler, *Mein Kampf. Zwei Bände in einem Band. Ungekürzte Ausgabe. Erster Band: Eine Abrechnung. Zweiter Band: Die nationalsozialistische Bewegung*, 141st-142nd ed., München, Eher, 1935 (1st ed. vol. 1: 1925, vol. 2: 1927), pp. 475-476.

⁶⁸ See Heinze, «Wir wollen deutsche Kinder sein». *Die Fibel im Nationalsozialismus zwischen Kindorientierung, Erziehung zur Volksgemeinschaft und Lesenlernen*, cit, p. 158.

From an «ABC book with prayers» to the primer of a new type: Tatar primers of the late 19th-early 20th century*

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ABSTRACT: From the second half of 19th to early 20th century, due to the distribution of the renovationist ideology of Jadidism, the life of Russian Muslims underwent profound changes. In the case of Tatars, these changes, among other things, came through the discovery of the childhood culture, reforming Tatar schools and textbooks. The new primers (alphabet books) based on a more advanced phonetic method of teaching, taught Tatar instead of Arabic or Turki, included secular texts and were often illustrated. They substituted the former religious primers which utilized the letter-by-letter reading principle. This article follows the process of creation and adoption of new Tatar primers in the educational space of the Kazan governorate and other regions of Russia at the turn of the 20th century. In this paper, we aim to reveal the background, main features and the outcomes of this process.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Religious Education; Islam; Primary Education; Kazan governorate (Imperial Russia); XIX-XX Centuries.

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Introduction

The *Alifba* Tatar primer (named after the first letter of the Arabic alphabet – «alif», and the second letter – «ba») is a textbook with a centuries-old history, which was widely used in the educational space of one of the largest multi-ethnic regions of Imperial, Soviet and Post-Soviet Russia – the Kazan governorate / Tatar ASSR / Post-Soviet Tatarstan and far beyond its borders, due to the broad geographic range of Tatar diaspora's resettlement. According to a number of sources, Tatar primers date as far back as the period of Volga Bulgaria – a Turkic-language medieval state created by the ancestors of Tatars in the 10th century. Tatar primers have been developing alongside with the rise of the Tatar ethnicity itself.

At the same time, by functioning in the situation of the long-time coexistence of two main ethnic, religious and cultural groups of the region in question – the Tatars and the Russians, the Muslims and the Orthodox Christians – the Tatar primers have come to represent the whole long and complex history of their coexistence and interrelation with 'the Other', with the notion of the 'other' and 'otherness' changing many times over the centuries. Researching the *Alifba* can not only help us trace the transformation of the image of the 'other' reflected in it, but also explore the mechanisms of its presentation, displacement and substitution, as well as the seminal role of 'otherness' and the politics of memory in the process of discovering and preserving national identity.

The Tatar system of primary and secondary school education is firmly embedded in history. In the 10th-13th centuries Volga Bulgaria, as well as after its dissolution and becoming a part of the Golden Horde, and the following creation of the Kazan Khanate in 1438, according to Muslim traditions, there existed primary religious schools in mosques called *maktabs*, and secondary (higher) educational institutions known as *madrasahs*, designed to train the clergy and provide theological education to Muslims. Literacy based on the Arabic alphabet was widespread. Teaching in the native language was viewed as one of the basic necessities for the moral education of younger generations.

After the annexation of the Kazan Khanate by the Russian state in 1552, the existing education system was destroyed, but the mullahs continued teaching children individually. It was only in the second half of the 17th century that the revival of Muslim religious education in the region began, continuing into the 18th and the first half of the 19th century. By the mid-19th century every congregational mosque had a *maktab*, and larger ones had a *madrasah*.

K.D. Uschinsky Academic pedagogical library (Moscow). The original text has been translated and adapted for the journal "History of Education & Children's Literature". Special thanks for the translation to Vladimir Makarov and Dinar Khayrutdinov, Kazan (Volga Region) Federal University, Institute of International Relations, History, and Orient Studies). The article is supported by the grant of the Russian Foundation for Humanities.

The second half of the 19th and early 20th century saw the rising influence of the renovationist ideology of Jadidism¹, which was becoming increasingly popular with Muslims and required, among other things, the substitution of religious education by the secular one and the use of a phonetic method of teaching reading and writing (the so-called *usul-i-jadid* – the new method) instead of the out-dated letter-by-letter principle (*ijiki*). Under these circumstances every aspect of life of the Tatar people underwent a considerable change. Tatar society radically altered its attitude to childhood and children. Tatar intellectuals started to clearly realize that the first steps for the ‘revival’ of the nation must start with a change in school education. This ‘child-centric’ turn led to the emergence of both Tatar children literature for adults and books to be read by children themselves². The latter are arguably the most numerous group of publications among all early 20th century Tatar books. Many children’s books were used as textbooks³. The number of textbooks proper, including primers, kept steadily growing. Their appearance clearly demonstrated the importance of the ‘children problem’ for Tatar intellectuals and the big role these textbooks played in educating Tatar children in accordance with their ethnic traditions and their exposure to various cultural achievements of the world.

The Tatar primers as a political and cultural phenomenon and as a medium containing information on the nation’s past have never been a subject of dedicated historical research, in Russia or elsewhere. For a long time, they were addressed only as a subject of a didactic or bibliographical analysis. In this article, we propose a possible research model for constructing a ‘cultural biography’ of the Tatar primers in the context of a multicultural environment.

The primary sources for this article are the collections of Tatar primers stored in the N.I. Lobachevsky Academic library of Kazan (Volga Region) Federal University (including the Manuscripts and rare books section), the National Library of the Republic of Tatarstan, as well as in the exclusive – the only one of its kind in Russia – primer museum, the *Museum of the Alifba*, founded in

¹ Jadidism (Arab. *jadid* – new) was a reformist educational and socio-political movement of Muslims of Russia of the second half of the 19th-early 20th century (M.Kh. Khasanov (ed.), *Tatarskaya Entsiklopediya* (hereafter abbreviated TE) [Tatar Encyclopaedia], Kazan, Institut Tatarskoy Entsiklopedii, 2010, vol. II, pp. 269-270.

² On establishment and development of Tatar literature for children see: L.I. Mingazova, *Svoeobrazie i tendentsii razvitiya tatarskoy detskoy literatury XX v.* [Originality and Tendencies of the Tatar Children’s Literature Development in the 20th Century], Thesis for a Doctor’s degree in Philology, Kazan, 2011. The author demonstrates that by the beginning of the 20th century the necessary pre-conditions for the establishment of children’s literature as an independent artistic system had been already formed in the Tatar literature, which was to a large extent facilitated by the wide popularity of educational ideas, the increasing number of schools and the creation of national textbooks.

³ E.g., R. Fakhretdinov’s book «Terbijale bala» («Educated Child») of the «Gyjme ekhlak» («Studies on Morality») series. First published in 1898, before 1914 it was reissued 13 times with large circulation, because it was widely used in lower grades of maktabs and madrasahs as a textbook.

1998 at Arsk Pedagogical College (Republic of Tatarstan). It was there that the authors of one of the most popular Tatar primers of the Soviet period – S.G. Vagizov and R.G. Valitova – have worked for many years. A lot of these primers are introduced into the academic discourse for the first time.

1. *First Tatar primers for Muslims*⁴

The first printed books for Tatar Muslim maktab only appeared at the beginning of the 19th century. In the second half of the 18th century the only known hand-written primers were those by Murtaza Qutlugush (Qotlygysh) and Ishniyaz bin Shirniyaz, which were very common among the Tatars⁵.

The first of the surviving printed primers for maktab is considered to be a Tatar ABC book named *Attagoji* («ABC book, reading and spelling») which also included prayer texts and was printed in Kazan in an edition of 11,000 copies in 1802. In this book, the fundamental principles of Islamic faith were introduced in the form of a conversation between two Muslims consisting of short questions and answers.

The book was very popular and was reprinted almost annually, with large circulation, which could be only explained by continuous high demand for it. Teaching reading and writing for both boys and girls (boys were usually educated by a mullah and girls – by his wife, *ostabika*) necessarily included using a primer «with spelling rules». This education continued for about two years: «A Tatar child would begin his lesson with this book, with its help he would read the *Alifba*, learn the language of the Quran, religion and acquire a certain background in *fiqh* (Muslim law)»⁶. Later the book was reissued under

⁴ In the late 18th-19th centuries the first Tatar primers for students of Russian grammar schools of the region were also compiled (*Azbuka tatarskogo yazyka s obshchym opisaniem bukv i skladov, sochinnyennaya kazanskikh gimnaziy uchitelem i admiralteyskoy kontory perevodchikom Sagitom Khalfinym, i tatarskikh v Kazani slobod mullami v onykh gimnaziyakh rassmotrennaya i odobrennaya* [Tatar Language ABC-book with the detailed description of letters and syllables, written by Sagit Khalfin, teacher of Kazan grammar schools and interpreter at Admiralteyskaya Sloboda, examined and approved by Kazan mullahs at the aforementioned grammar schools], Moscow, printed in Moscow Imperial University, 1778; I. Khalfin, *Azbuka i grammatika tatarskogo yazyka s pravilami arabskogo chteniya, prepodavaemye v imperatorskoy Kazanskoy gimnazii* [ABC-book and Grammar of Tatar Language with Arabic Reading Rules taught in Imperial Kazan Grammar School], Kazan, Kazan Imperial University Printing-house, 1809), as well as for baptized Tatars – a special ethnic and religious group of Tatars of Volga and Urals region, who practice Orthodox Christianity (Bukvar (dlya kreshchennykh tatar) [Primer (for the baptized Tatars)], Kazan, 1862).

⁵ *Bukvar* [Primer], in TE, vol. I, p. 478.

⁶ G. Rakhim, G. Gaziz, *Tatar edebiyaty tarikby* [History of Tatar Literature]. XVII, XVIII khem XIX gasyrlarda iske edebiyat, 1-nche zheld. Boryngy dever. Ochenche bulek. Kazan, Tatgosizdat, 1922, v. 1, part 3, pp. 73-74.

such titles as *Alifba iman sharty belen* («ABC book with prayers»), *Sharait al-iman* or *Iman sharty* («Conditions of faith»). The Tatars simply called it the *Alifba* (or *Elebbi*, *Elpi*). For the next 125 years – the last edition of the book came out in 1928 – the book did not change, except for the addition of the prayers that were previously not included in it. The language of the book was commonly described as ‘bookish’, as it was the official language of the religion, which for a long time was also the formal literary language⁷.

The Muslim clergy considered *Iman sharty* to be a ‘holy’ book. This primer also received some positive responses from Russian missionaries. In 1894 an Orthodox missionary and turkologist Yevfimiy Malov (1835-1918) translated it into Russian⁸. In his book *Mohammedan primer* (1894) he compared *Iman sharty* to the Russian scholastic ABC book «Introductory learning for those willing to understand the Holy Scripture» (1634). Y. Malov believed that the strong point of *Iman sharty* is its brevity (the book included only prayers), and its main drawback was, in his opinion, the low quality of print «with numerous proofreading errors, printed on bad, yellowish, thin paper, with a hackneyed, inconvenient lettering»⁹. Y. Malov was sceptical about the many reissues of the book, which in his opinion were excessive. Nevertheless, he called for borrowing the example of Tatar education, since all Tatars used a single primer, while Russian ones changed every 2-3 years. He believed the fear that the book would be banned to be the main reason for multiple reissues of the same primer. In fact, as Y. Malov argued, «the Mohammedan primer does not contain anything that would give the Russian government a serious excuse for banning the printing of this children’s book»¹⁰. In the meantime, this primer, like any other Tatar book, was automatically categorized by the Russian Empire as ‘non-Russian’, which to a certain degree explains the fear of its ban.

However, the criticism of *Iman sharty* was more often caused by its contents rather than appearance. At the end of the 19th century a religious primer did not satisfy the ambitions and demands of the leading Tatar intellectuals, who sought to reform the system of ethnic education. At the same time, it is impossible to ignore the fact that the Qadimist¹¹ system was a necessary and legitimate stage

⁷ R.R. Safullina, *Istoriya knigopechataniya na arabskom yazyke v Rossii u musulman Povolzhya* [History of the Book Printing in Arabic Graphics in Russia among the Volga Region Muslims], Kazan, Kazan University Publishing House, 2003, p. 37.

⁸ *Usloviya very* [Terms of Belief], Kazan, Imperial University Printing-house and Litography, 1894.

⁹ E. Malov, *Mukhameddanskyy bukvar (missionersko-kritichesky ocherk)* [Mokhammed’s Primer], Kazan, Imperial University Printing-house and Litography, 1894, p. 111.

¹⁰ *Ibid.*

¹¹ Qadimism (Arab. *qadim* – old) was the Tatar variant of traditionalism directed to consecration and intact preservation of religious and moral values, social relations and institutions established in the Tatar society in the course of its development. Qadimism appeared as a reaction to changes in social, economic, spiritual and ideological life of the Tatars in the second half of the

of development of the Tatar primary and secondary education, as well as its pedagogical thought. It provided a high literacy rate among the Tatars, which was in many ways caused by a certain cult of knowledge typical for the classic Muslim culture. As early as in 1840s, the famous Kazan professor, doctor of medicine, ethnographer and local history expert Karl Fuks (1776-1846) wrote: «Every visitor will undoubtedly find it strange to discover Kazan Tatars [...] to be a more educated nation compared to some other, even European, nations. A Tatar who cannot read and write is despised by his fellow countrymen and is not respected as a citizen»¹². As of 1884, 60% of Tatars and only 10% of Russians were literate (in the native language)¹³.

Jadidist education stemmed from the Qadimist educational system. It was in the Qadimist educational institutions where the leading Tatar intellectuals received their learning, and in their turn successfully carried out reforms in the spirit of the Jadidist ideology.

2. *Emergence of Tatar schools of the new method. Emergence and distribution of the Tatar Jadidist primers*

At the turn of the 20th century the Tatar ethnicity ('millet') gradually transformed itself into a nation, and the new – national – type of ethnic identity was formed. This process was accompanied by the gradual substitution of the old method (Qadimist) religious and theological educational institutions with the new method (Jadidist) maktabs and madrasahs. At first the new method schools were few, but after 1905 their number increased: first in large cities of the Volga and Urals regions, then in the rural areas as well.

In the new method schools teaching Tatar was supposed to use the most advanced approach for its time – the phonetic (syllabic) method (*usul sawtiya*). The new method also implied studying secular subjects and Russian language, by means of the class-and-lesson system and with certain equipment (desks, blackboards, etc.). One of the most important, albeit difficult, tasks was to introduce new textbooks into teaching.

The first new method primer, based on the phonetic approach, was the *Khoja-i-sibyan* («Teacher of children»), compiled by the well-known public figure, politician, teacher and publisher Ismail Gasprinsky (1851-1914)¹⁴. This primer was used to teach reading and writing at Gasprinsky's school, which

19th century. (*TE*, vol. III, p. 10).

¹² K. Fuks, *Kazanskie tatary v statisticheskom i etnograficheskom otnosheniyakh* [Kazan Tatars in Statistic and Ethnographic Meanings], Reprint, Kazan, DOMO «Globus», 1991, p. 126.

¹³ «Volzhskiy vestnik» [«Volga Bulletin»], n. 67, 1884.

¹⁴ I. Gasprinsky, *Khodzha-i-sibyan* [A Teacher for Children], Bakhchisar, Tardzheman Printing-house, 1890.

was opened in Bakhchysaray, Crimea, in 1884. The primer made use of Turki – a specific linguistic style based on a simplified version of Turkish, freed from Arabic and Persian loan words¹⁵.

Gasprinsky's primer inspired a lot of 'new' Jadidist primers. Most of them partially reproduced the structure of this book as a teaching aid for two languages – the native tongue and Arabic, as well as mathematics, history and geography. However, the structure of Gasprinsky's primer was not borrowed completely¹⁶. The sections on history and geography were not adopted, as they seemed too difficult to Gasprinsky's followers¹⁷.

Gasprinsky's primer only used prayers (and not secular texts) for teaching Arabic. In spite of his progressive views and reformist ideas, he was still a committed Muslim. We cannot ignore the fact that the clergy occupied the dominant position in Muslim society, which continued living in accordance with the Sharia. Most importantly, despite having introduced certain secular elements into its educational programs, the Tatar school itself had not been secularized yet, which explains the choice of contents for the textbooks.

Researchers believe that one of the first primers to use the phonetic method in the language of Kazan Tatars was the one by Shakirjan Tagirov, titled *Bad'e al-taghlīm nam mokammal alifba* («The complete ABC book»), 1893¹⁸. By 1917, this primer had been reissued 15 times¹⁹. Other first Tatar primers for Jadidist schools were also often reissued with large circulation, as there were still very few of them.

The explosive growth of the Tatar publishing business which occurred at the turn of the 20th century was bound to have an impact on educational literature: from early 1890s till 1917 in Kazan alone 20 to 60 (according to various

¹⁵ At the turn of the 20th century Tatar language did not have a generally accepted linguistic style or unified spelling rules. Most textbooks of that period substituted the term «Tatar language» by «torki tel» («Turkic language», «Turki»). The linguistic norms of Turki were mostly defined by the «Tarjeman» («Translator») newspaper (1885-1918), whose first editor and publisher was Ismail Gasprinsky. The linguistic style developed by him was supposed to acquire a universal character for all Turkic peoples of Russia. The experiment failed, however: as soon as the newspaper ceased to be issued, the language 'invented' by Gasprinsky disappeared as well, as it was in fact far removed from the local vernacular.

¹⁶ See, for instance: Kh. Maksudi, *Mogallim euvel* [The First Teacher], Kazan, I.N. Kharitonov's Litography and Printing-house, 1903; *Ibid.*, 1914.

¹⁷ Gasprinsky, *Khodzha-i-sibyan*, cit., pp. 45-47, 51-55, 67-68.

¹⁸ F. Ibragimov, *Belem alifbadan bashlana* (Knowledge begins with the primer), Kazan, Tatar Book Publishing House, 1973, p. 316; A. Khabutdinov, D. Mukhetdinov, *Opyt i perspektivy podgotovki konkurentnosposobnoy musulmanskoj elity v Rossii* [Experience and Perspectives in Training of the Competitive Muslim Elite in Russia] in *Reforma obrazovaniya: Tatory Nizhegorodchiny i musulmansky mir* [Reform of Education: Nizhny Novgorod Region Tatars and the Muslim World], <<http://www.idmedina.ru/books/school-book/?1306>> (last access: January 27th, 2014).

¹⁹ F. Ibragimov, *Razvitie metodiki obucheniya tatarskoj gramote i bukvari* [Development of the Tatar Literacy Education Methods and primers], Thesis for a Candidate's degree in Pedagogics, Kazan, 1969, pp. 33-35.

sources) Tatar primers were published²⁰. The special role in issuing these books was played by the Karimov brothers publishing house – the first private Tatar publishing business, opened in Kazan in 1899. In the beginning of the 20th century this publishing house issued half of all the books printed in Kazan in Tatar language, and a considerable part of them consisted of ABC books for new method Tatar schools²¹.

The government tried to get publishing of educational literature in Tatar language under its control. In December 1907 a special Translation committee was launched under the auspices of the Kazan educational district administration. The Committee's duty was both to publish and 'examine' educational books 'in languages of Oriental non-Russians', i.e. censorship of such books²².

Books of religious or ethnic content were dominant among the textbooks published in Kazan. As the records of the Kazan Interim Press Committee report for 1909 show, out of the 70 books for religious Muslim schools which came out that year, textbooks with a religious or ethical content amounted to 66,4%, while the ones devoted to general education only comprised 33,6%. According to the Committee, this proved that the new method schools could not yet replace the old method schools²³.

Mass publication of the new method primers began after 1905, alongside with the full-scale reform of madrasahs. Their authors were still the old method religious school graduates who lacked secular education. Nevertheless, they were all part of the intellectual elite of the Tatar society, and they had a vast teaching experience.

The compilers of new primers paid special attention to uniqueness and importance of Tatar language, as well as the need to learn it. Thus, linguist Gibad Alparov (1888-1936) included the following lines in his primer: «We are Tatars. We all speak Tatar language. Our native language is Tatar»²⁴. Jadidist primers included many examples of Tatar folklore, as well as literary pieces by such popular Tatar authors as Gabdulla Tukay (1886-1913), Dardmend (1859-1921), Uqmasi (1884-1948), Dumawi (1883-1933).

The wide popularity of Tatar primers and the importance of their further development was proved by the emergence of a number of critical essays on this topic. The most focused criticism came in the analytical review *Alifba kitaplaryna tenkyyt* («The Critique of Primers»), written by the famous Tatar historian

²⁰ Unfortunately, very few of these primers survived.

²¹ G.G. Gabelganeeva, *Knizhnaya torgovlya v Kazanskoj gubernii. Vtoraya polovina XVIII veka – 1917 god* [Book Trade in Kazan Province. The Second Half of the XVIII Century-1917 year], Kazan, Kazan University Press, 2006, p. 85.

²² See I.E. Krapotkina, *Kazansky uchebnyy okrug v kontse XIX – nachale XX veka* [Kazan Educational District at the end of the XIX-beginning of the XX Centuries], Moscow, Flinta, Nauka, 2011, pp. 122-123.

²³ National Archive of the Republic of Tatarstan, f. 420, op. 1, d. 150.

²⁴ G. Alparov, *Tatar alifbasy* [Tatar Primer], Kazan, I.N. Kharitonov's Litography and Printing House, 1913, p. 51.

and educationalist Gaynetdin Akhmarov (1864-1911)²⁵. He analysed ten of the most widely known primers of that time. Of these primers, G. Akhmarov could only recommend three or four, since the rest were, in his opinion, marred by incomprehensible choice of words and phrases, grammar mistakes, stylistically wrong expressions and the absence of any texts accessible to children²⁶.

It is strange, wrote G. Akhmarov, that good textbooks are often published only once, while the 'bad' ones get wide circulation. Wealthy citizens buy these books and grant them to madrasahs to fulfil their zakat²⁷. G. Akhmarov referred to rumors circulating in Kazan about these books being often written by poor shakirds²⁸, and then published under other – more famous – names.

G. Akhmarov's critical essay was quite well timed. By late 1910s Tatar primers became a necessary attribute of ethnic educational practices. Their wide and effective usage facilitated further promotion of literacy among the Tatars. According to observations made at that time by professor of Kazan Ecclesiastical Academy P.V. Znamensky, thanks to their many schools and printed press, the Tatar population at the present moment is almost entirely literate, and they look down on Russian peasants who cannot read or write... There is a firm belief among Tatars that there is no end to Muslim books, while there is an end to Russian books, and when Russians read them down to this end, then they will have to read Muslim books and become Muslims themselves. Having made a habit of reading, Tatars easily learn reading in Russian too²⁹.

3. *The contents of the new method Tatar primers*

Tatar primers of the late 19th-early 20th centuries were an important part of the cultural and historic legacy of the Tatar people. They represented a complex process of establishment and development of Tatar national pedagogy, traditions of primary education both at school and in the family. They also contained some truly unique information about the everyday life of children and adults, and Tatar society in general at a critical stage of its development. This is why these primers are an extremely valuable historical source.

Before the revolution the world of Tatar society was presented in the primers as an autonomous, enclosed space with no 'strangers' in it. Only their front

²⁵ G. Akhmerov, *Alifba kitaplaryna tenkyyt* [The Critique of Primers], Kazan: Electric Printing-house «Urnek», 1909, pp. 7-8.

²⁶ *Ibid.*, pp. 7-8, 28.

²⁷ Zakat (Arab.) is an obligatory tax specified by sharia and collected for the needs of the Muslim community.

²⁸ Shakird is a student of a madrasah.

²⁹ P. Znamensky, *Kazanskie tatary* [Kazan Tatars], Kazan, 1910, <<http://qazantatarlary.narod.ru/Znamensky.html>> (last access: January 12nd, 2014).

pages with publisher's imprint allowed us to find out the location of this 'enclosed' world. It is hard to determine when the interests of Russia started to be understood by the Tatars as 'our' interests as opposed to 'their'. Tatars and Russians lived next to each other but not 'together'. The ethnic and religious policy of the government only helped to further deepen this separation. Characters depicted in Tatar primers were extremely far removed from politics and all the social-political processes happening in Russia at that moment.

At the first glance it might appear that primers pay insufficient attention to the issues of educating the younger generation in accordance with ethnic traditions. The Tatar household elements were usually represented in the 'Clothes', 'Food', 'Everyday items' sections, which listed the vocabulary of Tatar jewellery and embellishments for women (earrings, rings, *chulpy*³⁰, *khasite*³¹), attributes of ethnic clothes (*bishmet*, *kazaki*³², *tubetey*³³, *takiya*, *kalfak*³⁴) and dishware (*kumgan*, *kazan*)³⁵. In fact, Tatar national traditions were always present in primers, but they were passed on to younger generations mostly through Islam. The authors of the textbooks relied on the belief that the culture of a nationality is preserved as long as its religion exists. According to one of the most distinguished Russian experts on Islam, member of the Academy of Sciences V.V. Bartold, the notions of 'ethnic' and 'religious' were absolutely 'identical' for the Turkic population of Russia³⁶, which is why particular attention was paid to educating children in accordance with sharia.

The Tatars were motivated by the quotation ascribed to prophet Muhammad that «the best inheritance from a father to his child is good upbringing», with high-quality education as its integral part. The latter was considered to be a formula for a happy and comfortable life of a Muslim. I. Gasprinsky's primer stated: «Knowledge is a Muslim's wealth»³⁷. These words were echoed by the primer compiled by the famous Tatar religious and social figure, one of the main ideologists of Jadidism Galimjan Barudi (1857-1921):

A good child reads books. He is well mannered. He helps his parents. He does not speak rude words. He greets everyone politely. If he has some money, he never spends them in vain. He buys a book instead. A good child sympathizes with the poor. He pities them and never runs away from them. He helps them. He respects scholars and educated people.

³⁰ Chulpy is a piece of jewelry worn on the braid.

³¹ Khasite is a piece of pectoral jewelry commonly worn by women.

³² Bishmet, kazaki are types of upper garments.

³³ Tubetey is a head-dress commonly worn by men.

³⁴ Takiya, kalfak are head-dresses commonly worn by women.

³⁵ See, M. Kurbangaliev, *Tatar alifbasy* [Tatar Primer], Kazan, I.N. Kharitonov's Litography and Printing House, 1912, p. 38.

³⁶ V.V. Bartold, *Raboty po istorii islama i Arabskogo khalifata* [Papers on the Islam History and Arab Caliphate], in Id., *Sochineniya* [Writings], Moscow, Science, 1966, vol. VI, p. 365.

³⁷ Gasprinsky, *Khodzha-i-sibyan*, cit., p. 34.

My son, try to be good too. Let your parents feel rich because of that. Receive their blessing. And you will be happy in this world and the afterlife (*akhiret*)³⁸.

Tatar primers usually contained clearly outlined basic rules and norms of children's behaviour. Worship of the Lord was placed above all other things in these rules. The basis for most new method primers was still formed by religious texts and prayers. For instance, G. Barudi's primer presented basic norms of Islam, pointed out Muslims' duties to their Lord and society and made the following conclusion: «Any person who follows these rules will go to heaven, while anyone who does not will be unhappy»³⁹. Sh. Tagirov's *Mokemel alifba* («The Improved Primer») had prayers virtually for every occasion: along with prayers to be recited at school there was a prayer, for instance, that was supposed to be read after the funeral rite (*jenaza namazy*)⁴⁰. The Friday prayer was considered to be of a particular importance, as Friday was respected as a holiday according to Islamic canon⁴¹. Most primers opened with the phrase sacred for every Muslim – the words that accompany any undertaking – *Aguuzu billaahi minash-shaytaanir-rajeem bismillaahir-rahmaanir-raheem* («I seek refuge in Allah from the accursed shaytan. In the name of Allah, the Most Gracious, the Most Merciful»), or, in short, *Bismillaahir-rahmaanir-raheem*.

A child was supposed to respect his parents and teachers – moreover, he had to respect the teachers even more than the parents: «One's duty to his mentor is higher than his duty to his parents, because it is the teacher who helps the child to achieve a mature personality»⁴². Usually in primers edificatory conversations happened between a mother and her son, because, according to sharia, it was the woman who was supposed to raise children in a Muslim family:

As soon as Salim was left alone with his mother, he asked her:

- Mother, where did you and father find me?
- My child, me and your father asked our Lord to give you to us, and He did.
- Mother, and what are you going to do with me?
- We shall send you to a school to khalfa (teacher). You shall study there.
- Why should I study?
- You, my child, shall become a servant of God after finishing your studies. And you shall be a helper to us⁴³.

³⁸ G. Barudi, *Savad khan* (Educated Man), Kazan, M. Chirkova and Sons' Printing-house and Lithography, 1897, p. 12.

³⁹ *Ibid.*, 15.

⁴⁰ Sh. Takhiri, *Mekemel alifba* [The Improved Primer], Kazan, I.N. Kharitonov's Litography and Printing House, 1910, pp. 61-64.

⁴¹ Maksudi, *Mogallim euvel*, cit., Kazan, Imperial University Printing-house and Lithography, 1898, pp. 30-31; Kh. Zabiri, *Mektep balalaryna yuldash yahud resemble alifba* [«A Friend for the Schoolchildren, or A Primer with Pictures»], Kazan, Imperial University Printing-house and Lithography, 1907, p. 42.

⁴² Takhiri, *Mekemel alifba*, cit., pp. 59-60.

⁴³ G. Gafurov, *Zhinel alifba yaki alifbai sutiya* [Easy, or Sound ABC Book], Kazan, Kharitonov's Litography and Printing House, 1904, pp. 21-22.

The authors of the primers tried to create a model of behaviour of a ‘good’ boy – *shakird*. It was an obedient, diligent, modest child. He only plays inside the backyard of his home or in the garden and only with other *shakirds* (students). He never plays in the street or at school, he keeps away from illiterate ‘street urchins’. He does not like noisy, lively games. In Kh. Masudi’s primer the little *shakird* describes his leisure activities in the following way: «After school we work at home. We do not play much. Not as much as illiterate children do. None of us is interested in games. We only think of studying and respectable behaviour (*edep*). At home we always sit I front of books and write»⁴⁴. Before school the *shakird* performs an obligatory morning prayer. He abides by the rules of hygiene both at school and at home⁴⁵. He is a role model for all the other children.

If a child departed from the regulations, he would sometimes be punished. In the text called *Shakird’s words* from Kh. Masudi’s 1903 primer there is a mention of a dark room used to lock away disobedient students who missed their classes⁴⁶. Other primers also mention various punishments, including physical penance⁴⁷.

In the beginning of the 20th century many pages of primers were devoted to describing the new method education both in the city and in rural areas. Kh. Maksudi’s primer contained a text called *Our village*, in which a young student speaks about the advantages of the new system of acquiring knowledge:

It has been a year since they began to teach according to the new method in our village. We began studying a month and a half ago. Before that we did not know a single letter. Now, praise Allah, we know all Turkic letters. We can read and write. Before that, nobody in our village could write properly, except for one or two rich kids who graduated from a madrasah in the city⁴⁸.

It is clear from the primers’ texts that at the age of 7 or 8 children were already studying at new method schools. The students were divided into groups who studied in different classrooms. At the lessons children used to sit on benches, and the teacher (*khelfe*) sat behind a desk. He wrote on a blackboard with a piece of chalk. All the lessons were scheduled, and there used to be a break every hour. The core curriculum consisted of Reading, Writing, Mathematics and Drawing⁴⁹.

⁴⁴ Maksudi, *Mogallim euvel*, cit., 1903, p. 46.

⁴⁵ *Ibid.*, p. 44; G. Muslimov, *Sabyylarga yul bashy* [The Road Start for Children], Kazan, Ufa, Matbuga Karimiya, 1908, pp. 22-23.

⁴⁶ Maksudi, *Mogallim euvel*, cit., 1903, p. 45.

⁴⁷ Barudi, *Savad khan* (Educated Man), Kazan, 1892, p. 17; Muslimov, *Sabyylarga yul bashy*, cit., p. 26.

⁴⁸ Maksudi, *Mogallim euvel*, cit., 1898, pp. 47-48.

⁴⁹ *Ibid.*, pp. 44, 47; Kurbangaliev, *Tatar alifbasy*, cit., p. 31.

Most of the Tatar new method primers consisted of several parts, often of two – the Tatar part and the Arabic part, because knowing Arabic writing was necessary to read the Quran. The notable feature was the presence of similar or even identical texts in Tatar primers compiled by different authors, including some texts taken directly from Russian primers. This goes to prove the point made by A.A. Senkina about two Russian primers of the period in question: they had two types of contents – a ‘flexible’ part, written by contemporary authors and describing new realities of life, and the second part consisted of a stable, ‘canonical’ set of texts⁵⁰.

4. *Visual imagery of Tatar primers at the beginning of the 20th century*

One of the most effective ways of modernizing ‘old’ Tatar primers was including visual imagery.

The art style of traditional Tatar primers abided by Islamic canon: since the depiction of living beings was forbidden, there were no pictures there. Their main decoration instead was a floral ornament, which has always been integral for Oriental art⁵¹.

The first Tatar illustrated primers appeared in the beginning of the 20th century – these were the primers by G. Alparov, Kh. Zabiri, M. Kurbangaliyev, Kh. Maksudi, A. Mustafa, Sh. Tagirov, I.N. Kharitonov⁵². Illustrations in these books were very limited though: pictures amounted to less than 5-10% of the book as opposed to printed text. Nevertheless, it was a true revolution in publishing Tatar books for children.

The most widely used images were depictions of household objects and animals, specifically domestic animals. Almost all of the pictures were black and white, many of them were small and illegible. Complex drawings rarely appeared. The names of the artists who made the illustrations were usually not mentioned. Nevertheless, these pictures formed a certain set of imagery, albeit the one imperfect in drawing and limited in content. But this imagery still performed a certain function in the educational process.

⁵⁰ A.A. Senkina, *Kniga dlya chteniya v 1920 godakh: staroe vs novoe* [Reading Book in the 1920s: Old vs New], in S.G. Leontyeva, K.A. Maslinsky (edd.), *Uchebnyy teksk v sovetskoy shkole* [Training text in Soviet School], Saint-Petersburg, Moscow, Institute of Logic, Cognitology, and Development of Personality, 2008, pp. 28-29.

⁵¹ P. Dulsky, *Oformlenie tatarskoy knigi za revolyutsionnyy period* [Tatar Book Design during the Revolutionary Period], Kazan, Tatpoligraf, 1930, pp. 4, 6.

⁵² It is hard to say who was the author of the very first Tatar primer with illustrations. F.I. Ibragimov believes it was Kh. Zabiri, the author of the *Mektep balalaryna yuldash yakhud resemble alifba* [“A Friend for the Schoolchildren, or A Primer with Pictures”], 1907 (Ibragimov, *Razvitie metodiki*, cit., p. 27).

I.N. Kharitonov's primer *Bulek* («Gift») deserves a special mention among all other illustrated primers. It was printed in I.N. Kharitonov's own publishing house Slovolitnya in 1912. Its cover featured the following title: *Khariton babay. Balalar ochen berenche alifba* («Grandpa Khariton. ABC book for children»). Kharitonov's publishing house created new samples of Arabic and Tatar fonts, which soon became known as the 'Kharitonov fonts', and they were used to print the *Bulek* primer as well⁵³.

The *Bulek* can be distinguished from all other Tatar primers for the relatively bigger number of illustrations. Its bright cover attracted attention at the very first sight – it had an image of a boy and a girl sitting at a table and curiously browsing through an illustrated book which looked very much like *Grandpa Khariton's* primer itself. The children were dressed in European clothes, and only a *tubetey* on the boy's head and a *kalfak* on the girl's head with a cropped haircut gave away their ethnic identity. Children's toys were depicted lying on the floor. The image was, undoubtedly, that of children from a wealthy Tatar family with progressive views on organizing their everyday private space. The world of things around them was very different from the world in which most Tatar children lived in the beginning of the 20th century.

The primer did not feature lengthy coherent texts. It only included words written with Arabic, Latin and Cyrillic letters, pictures and words which explained what the pictures meant – these were often in Russian, but written with Arabic letters (i.e., *rak* – «cancer», *zhuk* – «beetle», *oryol* – «eagle»).

Contrary to the cover of the book, most of the illustrations inside depicted things and objects widely used by various social groups of the Tatar people both in the cities and the villages (a hatchet, a saw, a pot, a *kumgan*, etc.), but sometimes these were objects that children, especially villagers, could be unfamiliar with (an umbrella, a pair of compasses, a bicycle⁵⁴). Pictures of exotic fruit such as lemons or dates on a palm tree looked slightly more familiar, although foreign⁵⁵. Dates (*khorme*) were considered to be a paradise fruit (*jennet jimeshe*) by the Tatars: their pits were often used to make prayer beads⁵⁶.

Narrative illustrations also held an important place in Kharitonov's primer – these often represented Tatar national themes and symbols. For instance, Kharitonov was one of the first to show the role of religion and religious traditions in the life of Kazan Tatars through illustrated texts. One of such pictures showed a traditional Muslim meal for men in a wealthy house. The men are depicted sitting on the floor with their legs crossed, the meal being a

⁵³ I.N. Kharitonov, *Bulek* [Present], Kazan, I.N. Kharitonov's Litography and Printing House, 1912, p. 2.

⁵⁴ Kharitonov, *Bulek*, cit., pp. 5, 7, 9.

⁵⁵ *Ibid.*, pp. 5, 8.

⁵⁶ D. Galiullina's grandmother Gilmibayan Nasretidinova (born 1919) told her of this tradition.

part of a religious ceremony⁵⁷. The caption under the picture reads *ziyafet* – an Arabic word meaning «inviting guests» or «hospitality». Another image was that of a man in a *tubetey* and short ornamented *ichigi* performing his prayer⁵⁸. The interior of the room reminds of a prayer hall in a mosque. The drawing of a *kumgan* («jar») is also symbolic, as it is impossible to imagine the everyday life of Kazan Tatars without this object⁵⁹, which was often viewed as a symbol of purity, tidiness and religious piety of the Tatar population⁶⁰.

The illustrator also did not forget the symbol of Tatar religious architecture – a mosque⁶¹. There is a picture that shows one of the most beautiful mosques of Kazan – the Azimov mosque, built in 1887-1890.

The primer of Grandpa Khariton with its colourful cover and numerous pictures was noticed by the classic Tatar poet and writer G. Tukay, who featured it in his poem *Sabitnyng ukyrğa oyrenue* («Sabit learns to read»)⁶². The hero of the poem is a curious boy who receives Grandpa Khariton's primer as a gift from his father *Bu alifba bulege Kharitonov babanyng* («This gift of an ABC book is from Grandpa Khariton»)⁶³:

Sabit is six now. He's wise beyond his years,
He is the only child, and loved by everyone. [...]
A question he addresses to his father once:
«Why, dear father, haven't you brought a book to me?» [...]
Although the father was puzzled by this request,
He still immediately bought him an ABC book called «Gift» [...]
Sabit has now forgotten games, he is busy with his studies.
He can already read his «Gift» by spelling out the words. [...]
Once he began to read aloud at a family dinner,
And left his father and mother astonished and amazed.
«G-I-F-T», he spells, somewhat awkwardly and slowly,
«From un-cle Kha-ri-ton», he goes on reading.
The father beams with smiles of happiness,
He sips his tea and listens. And the mother glows with joy. [...]

I.N. Kharitonov's book was also the first Tatar primer which could be used to teach children with disabilities. There was a coloured sign language alphabet at the end of the book. Drawings of fingers and hands symbolizing letters were accompanied by Tatar letters based on Arabic writing.

⁵⁷ Kharitonov, *Bulek*, cit., p. 7.

⁵⁸ *Ibid.*, p. 5.

⁵⁹ *Ibid.*, p. 9.

⁶⁰ The *kumgan* is used to perform the obligatory ritual of ablution before the prayer.

⁶¹ *Ibid.*, p. 8.

⁶² The poem was first published in 1912 as a supplement to the *Bulek* primer and was illustrated (G. Tukay, *Eserler [Writings]*, Shigurler, poemalar), Kazan, Tatar Book Publishing House, 1976, v.2, p. 371).

⁶³ *Ibid.*, p. 221.

Among all Tatar primers printed before the revolution, Sh. Takhiri's «alifba with pictures» (1914) stood apart because of both its rich visual imagery and its general quality⁶⁴. Sh. Takhiri was the first Tatar artist who received a license to teach drawing from the Imperial Academy of Arts. In his primer he included images of urban and rural landscapes, narrative drawings depicting people and small details of everyday life. For example, in his picture of an interior of a wealthy citizen's home one can find thoroughly detailed elements of decorations, carpets or shamails⁶⁵.

Relatively few images of people can be found in Kh. Maksudi's primer, but every image has a deep meaning, represents Tatar traditions and subtly enjoins following them. One of them, for instance, shows a woman taking water from a well. She is cloaked in a shawl, or kerchief, which conceals the contours of her body almost entirely⁶⁶, which is in exact accordance with the behaviour regulated by the religion. In this primer one can also find an image of a woman representing wealthy social groups of Tatar urban population, depicted against the background of a stone fence with bars⁶⁷. The woman's face is uncovered. Although it is very difficult to discern the details of clothing in the picture, it is still clearly visible that the woman is wearing a dress of such a fashion that was popular with middle-class Tatar city women in the late 19th-early 20th centuries. On the next two-page opening of the primer there is a teenage girl reading a book amidst some tall grass. She is not wearing a kerchief but a small *kalfak* instead, and her clothes resemble a grammar school uniform⁶⁸. This was the type of clothes worn by female students of Tatar new method schools at the beginning of the 20th century⁶⁹.

Thus, this primer managed to capture the correlation of traditions and innovation in the everyday gender-based activities of Tatar women of that time.

Illustrations to Kh. Maksudi's 1914 primer also demonstrate serious changes in the life of Tatar women⁷⁰. A young Tatar lady is shown sitting in an elegant armchair with a little girl in her arms. On a table next to them is a table lamp with an expensive-looking lampshade. Both the room furniture and the clothes worn by the mother and her child are completely European. The woman's hairstyle is in the fashion of that time. The girl's hair is closely cut, and

⁶⁴ Sh. Takhiri, *Fonetizm ysuly belen tertip itelmesh resemler alifba* (Phonetic Illustrated Tatar ABC Book (in Kazan Dialect)), Kazan, I.N. Kharitonov's Litography and Printing House, 1914, pp. 6, 10, 32, 33, 37.

⁶⁵ Shamail is a religious image based on the art of Arabic calligraphy. Shamails are popular in the culture of Central Volga and Urals Tatars and are usually presented as easel paintings.

⁶⁶ Kh. Maksudi, *Resemle megallim ewel* [A First Teacher, with Pictures], Kazan, «Umud» Company Printing House and Litography, no date, p. 3.

⁶⁷ *Ibid.*, p. 18.

⁶⁸ *Ibid.*, p. 5.

⁶⁹ This is proved by some surviving photographs of that time stored in both public archives and private collections.

⁷⁰ Maksudi, *Mogallim ewel*, cit., 1914, p. 2.

her head is not covered. And only a *kalfak* on her mother's head – a sort of a national stereotype – shows that this woman is a Tatar from Kazan.

According to contemporary sources, even at the turn of the 20th century it took a great deal of courage for a woman to put on 'European' clothes, and it showed that she was educated and had progressive views. Remembering his childhood at the end of the 19th century, Abdul-Kadyr Gubaydullin wrote the following about his mother Ummugulsum: «She was an intelligent and educated woman for that time; she never was conservative [...], which on the surface was expressed in the way she dressed us in European clothes forbidden by our customs»⁷¹.

Visual texts of the early 20th century *Alifba* also demonstrate how education was organized at ethnic schools. Images of such objects of everyday school life as a student's desk and a blackboard begin to appear in the primers. They can be seen in the illustrations to Kh. Zabiri's primers of 1907 and 1908⁷². Since these primers were mostly designed for village schools, there were many images of agricultural instruments shown in their evolution: for example, beside the picture of an ordinary plough (*saban*) an image of its newer modification was featured as well⁷³.

Some Tatar primers of the pre-revolutionary period included new images that were not typical for primers before that. For instance, the illustration for the letter «M» in G. Alparov's primer is an image of a rifle (*myltyk*)⁷⁴, and the illustrations for letters «C» (“S”) and «Ж» (“J”) in Sh. Takhiri's primer of 1914 are pictures of a soldier and a gendarme respectively⁷⁵. Russian symbols of state started to appear in some primers as well – these included depictions of the Russian flag, sometimes decorated with the monogram of Nicholas II⁷⁶, which served as an illustration to the letter «Г» (“G”) (*galem*) or to the Russian word «флаг» (“flag”)⁷⁷.

The emergence of such images, on the one hand, showed the authors' willingness to make their textbooks more 'modern'. On the other, it reflected the changes that happened within the mind-set of Tatar intellectuals. Further development of the Tatar national culture and language required reconsideration and re-evaluation of a number of former ideas, attitudes and spiritual values and erased the borders between the 'our' world and the world of 'others', facilitating their mutual interaction and enrichment. Modernity entered the pages of

⁷¹ *Avtobiografiya Abdul-Kadyra Gubaydullina* [Abdul-Kadyr Gubaydullin's Autobiography], «Ekho vekov», n. 3-4, 1998, p. 187.

⁷² Kh. Zabiri, *Mektep balalaryna yuldash yahud resemler alifba*, Kazan, Imperial University Printing-house and Litography, 1907; *Ibid.*, Kazan, Imperial University Printing-house and Litography, 1908.

⁷³ *Ibid.*, pp. 29, 33.

⁷⁴ Alparov, *Tatar alifbasy*, cit., p. 7.

⁷⁵ Takhiri, *Fonetizm ysuly*, cit., pp. 7, 26.

⁷⁶ *Ibid.*, p. 33. Arabic word «galem» transformed into «elem» (“flag”, “banner”) in Tatar.

⁷⁷ *Ibid.*, p. 31; Kharitonov, *Bulek*, cit., p. 7.

Tatar primers commandingly, and there was no way to resist that anymore. Gradually, often consciously but sometimes involuntarily, illustrated texts were becoming important guides to the new way of life and new thinking. They reflected new political trends which no one could isolate herself from, as well as the renewed world of objects of the new century, which was gradually adopted and appropriated by the Tatar society. They also reflected the achievements of Jadids in the Tatar pedagogy. However, children and childhood itself were only represented in a limited form in the visual imagery of Tatar primers, because the 'discovery' of childhood in the Tatar society was only at its beginning.

Conclusion

The Tatar primer underwent a revolutionary transformation at the turn of the 20th century. In fact, it was created anew in accordance with the demands of the period and in response to the new challenges. While first Jadidist primers were mostly directed to creating the new, phonetic method of teaching, after 1905 their tasks and functions expanded a lot: from then on they became focused on recreating the Turkic-Tatar nation by the European example, autonomous in terms of religion and education.

By fulfilling their main task – the task of teaching children their native language, Tatar primers helped to solve another problem of equal importance – the problem of preserving and developing the Tatar national culture, as well as raising a new, all-round educated, generation of bearers, translators and keepers of this culture. A special credit should be given to Jadidist schools for introducing teaching in Tatar language instead of the so-called Turki language or Arabic. And in this respect it is hard to underestimate the role of Tatar primers.

A very important step in the development of Tatar primers at that period was the transition from an exclusively text-oriented approach to visualization, which allowed to enrich the content of primers and make them more comprehensible and accessible.

At the same time, the Tatar *Alifba*, like most other 'non-Russian' primers of a native (i.e., non-missionary) origin, although it did not straightforwardly reproduce educational attitudes of the imperial authorities towards non-Russian population, still reproduced them implicitly, as only the absence of 'inappropriate' ideas could grant unrestricted access to the Tatar primer for its users. Religious texts and subtexts, the image of a 'perfect' (i.e., 'good', 'obedient') child which was supposed to grow into an equally 'perfect' citizen of the Russian Empire, who followed both the Islamic religious canon and the Imperial political canon, – all of these factors made the Tatar *alifba* acceptable

and non-threatening for the supreme power and helped its wide circulation and popularity.

The authors of the new method Tatar primers were among the first Russian Muslim teachers who advocated for increasing the secular component of education, who stood for compiling textbooks based on local materials and teaching children the language that they actually understood. However, both the textbooks and their creators came out of a Muslim environment and were related to Muslim culture, and therefore could not function outside the Islamic discourse. The religious idea clearly expressed in virtually every Tatar alifba (with rare exceptions) was successfully combined with an educational idea; the religious discourse was combined with the national or ethnic discourse. The ‘new’ primers emerged as some kind of a synthesis between the spiritual and the secular, the Eastern and the Western, the traditional and the innovative, which allows us to categorize them as a special type of ‘proto-secular’ Muslim educational literature⁷⁸, which laid the foundation for the progressive Tatar ‘primer-making’ tradition.

But as soon as the discussions about the best possible content and the principles of formation of an alifba ended, and as soon as Tatar children and teachers of the leading Jadidist schools adopted the primers of the new kind, the giant wave of the revolution swept through and destroyed all the achievements of the ‘regressive’, ‘conservative’, ‘feudal and bourgeois’ national culture. Decisive actions taken by the Bolsheviks to create a new ethnic school were productive and effective at first, as they opened the door to knowledge for the masses. But often they were accompanied by questionable educational experiments which ruthlessly destroyed the achievements of the pre-revolutionary Tatar pedagogy and culture and led to irreparable losses and unjustified sacrifices.

⁷⁸ This term was, for instance, used by D.M. Usmanova to characterize the writings of a number of representatives of Tatar historical thought of that time. (D. Usmanova, *Sozdaavaya natsionalnuyu istoriyu tatar: istoriograficheskie i intellektualnye debaty na rubezhe vekov* [Creating of the Tatar National History: Historiographic and Intellectual Debates on the Centuries’ Frontier], in I.V. Gerasimov, S.V. Glebov, S.V. Kaplunovsky, M.B. Mogilner, A.M. Semyenov (edd.), *Novaya imperskaya istoriya postsovetskogo prostranstva* [New Imperial History of the Post-Soviet Space], Kazan, Center for Nationalism and Imperial Studies, 2004, p. 112.

Research on the history of reading primers: a call for enhanced cross-border cooperation

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ABSTRACT: Throughout Europe, studies on the history of reading primers are as a rule characterised by three features. First, they are conceptualized as national research, and they are rooted in discourses of national history; second, they tend to tackle research questions and use methodologies of a single academic discipline; third, they have a clear focus on primers which implies that they abstract away from other educational media produced and used to support literacy acquisition. In this paper I argue that, the power and the merits of such approaches notwithstanding, research on educational media for literacy instruction can profit enormously from research, which is truly international and interdisciplinary. This paper discusses potentials of such cross-border research. It does so by drawing from observations made in the context of activities of the Reading Primers Special Interest Group (RP-SIG), a network established five years ago and aimed at the international collaboration of scholars and organizations with an interest in the history of educational media for literacy instruction.

EET/TEE KEYWORDS: Primers; Spelling; Language Teaching; Textbook; Multilingualism; History of Education; Europe; XVI-XX Centuries.

Introduction

Be it the *aapinen* in Finland, the *abece* in Latvia, the *bukvar'* in Russia, the *elementarz* in Poland, the *Fibel* in Germany or the *slabikář* in the Czech Republic: In a great number of European countries the reading primer, i.e. the book created for use in beginning reading instruction, is seen as a unique type of textbook. Considerable attention is paid to its past, especially in educational history and

book history. At the same time this attention is not limited to the academic realms of historiography. Rather, primers are also seen as important documents of cultural and national history. Proofs of this are, among others, reprints of old editions and exhibitions of primers, often accompanied by the publication of research work and exhibition catalogues.

In many instances, the early history of primers is closely connected with the beginnings of book printing, and sometimes even with the first printed book in a given language. For example, the *Abckiria*, compiled by Mikael Agricola and published in 1543, is the first book in the Finnish language; similarly, the first Slovenian book which went to press in 1550 is Primož Trubar's *Abecedarium vnd der klein Catechismus In der Windischen Sprach* [Abecedarium and the small catechism in the Windish (in this case: Slovenian) language]. And among the first German primers we find the *Handtbüchlein wie man die Kinder zu der geschriff und lere halten sol* [Manual how to teach children literacy and religion], first published in 1524 in Wittenberg – a translation from Latin of *Elementa puerilia*, a textbook for beginning readers originally written by Philipp Melanchthon, one of the most prominent figures of Lutheran reformation.

While reading primers are included in the cultural memory of a great number of European nations, the attention devoted to these books is as a rule also limited to national discourses. This is regrettable for various reasons. One is that the immediate context of the development of primers at least up to the 19th century is often trans-national: with methods of reading instruction and/or content of textbooks repeatedly borrowed from abroad. Moreover, historical textbook studies can per se profit enormously from cross-national comparative research. Therefore members of the International Society for Historical and Systematic Research on Textbooks and Educational Media have in 2009 started an international network: the Reading Primers Special Interest Group (RP-SIG). From its beginning, the RP-SIG has provided a forum for cross-border exchange of information about the history of primers and other instructional materials for beginning readers, about related research and about other relevant activities¹. English, today the lingua franca in many research areas, has been chosen as the main working language of the network.

The following is a presentation of some considerations and ideas which have emerged in the context of activities of the network. The focus is on potentials of cross-border research, with the term 'cross-border' used in two respects: across national borders, in the sense of international research and across the borders of academic disciplines, in the sense of interdisciplinary research.

¹ In summer 2014 RP-SIG had members in Belgium, Brazil, Croatia, the Czech Republic, Estonia, Finland, Germany, Italy, Latvia, Mexico, Poland, Russia, Spain and the United Kingdom. More information about the network in English and German is available through the website of its parent organisation: <<http://www.schulbuch-gesellschaft.de>> (last access: March 14th, 2014).

To demonstrate potentials of such cross-border research I will start with some general considerations on the subject matter in question, i.e. the reading primer (part 2). Next, some features of research on the history of primers will be highlighted, with a view on limitations of national accounts (part 3). Finally, I will use characteristics of an ongoing RP-SIG project devoted to plurilingual primers with German and Slavic languages to demonstrate both the need and the potentials of international and interdisciplinary research (part 4).

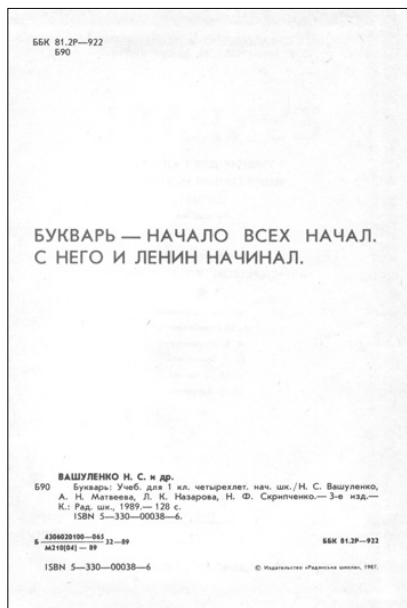
1. *Reading primers in an international perspective: an effort to determine the subject matter*

How can we gain a common understanding of the subject matter at international level when we refer to reading primers? Undoubtedly primers have their specific history in different countries, and connotations of the terms applied for this particular educational medium do vary to a certain degree within countries, and even more so across countries. These variations in part reflect specific practises and traditions of reading instruction, but also perspectives of those dealing with the subject matter. However, regardless of such variations it is necessary for the purposes of this article to have a working definition which is suitable for international use. The definition suggested here is that the reading primer is a book – or a series of booklets – produced for use by instructors and learners in the process of teaching and learning the rudiments of reading. This definition has a number of implications.

First, it is important to be aware of the pragmatic nature of this definition. Basically, a major reason to argue in favour of a definition is that its elaboration forces those involved in this process to tackle the question of inclusion and exclusion of items. While such definitions and delimitations are often provided in bibliographies of primers², this is less the case in research literature. For example, an edited volume published 2003 in Germany entitled *Geschichte der Fibel* [History of the primer]³ contains a number of articles worth reading, but it does not even try to explain what the book as a whole is about – for example, in terms of the types of texts, languages or countries covered. Instead the preface states that “the primer undoubtedly is the most interesting school textbook”

² See, for example, the bibliographies of Polish and of German primers: F. Pilarczyk, *Opisy bibliograficzne w układzie alfabetycznym*, in *Elementarze polskie od ich XVI-wiecznych początków do II wojny światowej: próba monografii księgoznawczej* [Polish primers from their beginnings in the 16th century until the Second World War: An attempt of a monography on book-studies], Zielona Góra, Oficyna Wydawnicza Uniwersytetu Zielonogórskiego 2003, pp. 295-411; G. Teistler, *Fibel-Findbuch. Deutschsprachige Fibel von den Anfängen bis 1944. – Eine Bibliographie* [Primers in the German language from the beginnings until 1944. A bibliography], Osnabrück, Wenner, 2003.

³ A. Grömminger (ed.), *Geschichte der Fibel*, Frankfurt am Main-Berlin-Bern, Peter Lang, 2003.



Pic. 1. Hagiography of the primer in a Russian bukvar' for Russian schools published in the late 1980s in the Soviet Ukraine. From: N.S. Vashulenko, A.N. Matveeva, L.K. Nasarova, N.S. Skripčenko, *Bukvar'. Učebnik dlja 1 klasse četyrehletnej načal'noj školy*, Kiev, Radjans'ka Škola, 3-e izdanie 1989, pp. 2-3. The text to the left reads: «The primer is the beginning of all beginnings. Also Lenin started (to learn) with it». The picture to the right depicts young Lenin, holding a primer.

(*ibid.*, p. 7). It is unfortunate that such hagiography of the primer, found as a practise of cultural memory in various countries (see Picture 1) more often than not replaces efforts to define the subject matter even in academic texts.

Second, the reading primer can be described as a specific type of reader (reading book), and in a number of languages it is also called 'first reader'. In the Slovenian case, for example, various terms were used in the past to denominate the primer, including *ABC bukvice*, *abecednik*, *abecedar* and *začetnica*. However, in the 1960s the term *prvo berilo* took hold⁴. And the history of German primers includes textbooks termed *Erstes Lesebuch* since the 19th century. In addition we encounter book titles in various languages connecting both terms in the sense of "primer and first reader", for example in Estonian [*aabits ja esimene lugemik*] or in German [*Fibel und erstes Lesebuch*]. In those cases, the term primer is used exclusively to designate the first part of the book, containing a course for beginning reading instruction, with the text restricted to individual letters, syllables, words and at most short sentences. In

⁴ See M. Marinšek, *Prvo berilo od Trubarja do danes* [The first reader from Trubarj to today], in *Moje prvo berilo* [My first reader], Velenje, Pozoj, 2000, pp. 35-126.

contrast, the content of the ‘first reader’, in those cases forming the second part of the book, is typically made up of stories, poems and other more elaborated reading matter. Textbooks arranged in that way are included in the definition of primers presented above.

Third, while in many countries the reading primer is basically associated to be a textbook for use in grade 1 of elementary school and approved by state authorities, the body of primers covered by the definition is not limited to state approved school textbooks. Rather, it also includes basic literacy materials for education outside the institutions of compulsory schooling. Thus it covers materials for family instruction produced and disseminated to support literacy acquisition in heritage languages, especially in those of autochthonous or allochthonous linguistic minorities, and textbooks specifically designed for teaching the rudiments of reading to illiterate adults.

Forth, in most cases the primer is not limited to the purpose of imparting basic skills in reading. The early history of beginning reading instruction in Europe is closely linked with religious instruction, especially with catechization. In pre-modern times, primers were as a rule also religious books, and from the perspective of textbook history, the relationship between catechism and primer over time is a topic well worth to be studied. Another point is literacy. In that respect the primer is in fact quite often a reading and writing primer. In addition, the primer may be a pure textbook or it may have illustrations – and may even be designed as a comic. Other ‘identities’ the primer can take over include those of a language book, a biology book, a history book or a social-studies book.

On the one hand the primer is produced as a simple consumer item, intended to support the process of teaching and learning in an early stage. On the other hand this item, looked at over time and even more so across countries and languages, is characterised by an impressively multifaceted nature, and thus it deserves to be studied as a complex document of educational and social history.

2. Studies on the history of reading primers: some observations and conclusions

One of the first project ideas of the RP-SIG, agreed in 2010 by a group of members from Germany, Poland, Russia and Spain, was to compile an international bibliography of studies on primers and related textbooks, with titles of these studies in various languages also translated into English. A first edition of the bibliography (International Bibliography of Studies on Reading Primers and Basal Readers = IBSP) was published online in 2011⁵, and work

⁵ V. Bezrogov, K. Mahamud Angulo, W. Sroka, J. Wojdon (edd.), *International Bibliography*

is in progress to edit a second, considerably enlarged edition. No doubt the limits of such an endeavour have to be taken into account, e.g. in terms of various degrees of coverage of relevant literature in individual languages. However, the bibliography reveals some characteristics of this research area. These characteristics include the attention paid in particular countries to single textbooks or to groups of primers published in specific historical periods and/or regions, and also the variety of interests which lead to scholarly work on primers – with historical interests ranging from methods of reading instruction through childhood, education and social values to literacy and standards of written language. One general feature, however, is that literature on the history of these textbooks is usually not only authored by individual persons, but also written by nationals about the history of primers in their country and in the respective national language.

Consequently, research is usually framed by specific national and disciplinary discourses, and it is only rarely perceived in other language communities. There is no doubt that, depending on the questions raised, both national and mono-disciplinary accounts can be regarded as works in their own right. At the same time such limitations, especially in case they are characteristics of a whole research area, are regrettable for a number of reasons.

First, the history of educational movements in the past few centuries is not limited by the borders of national history, and consequently there is a set of research issues deserving international approaches. These issues include, for example, the relationship between catechesis and reading instruction and – in textbook history – the relationship between catechisms and primers, be it in the Protestant, the Catholic or the Orthodox tradition⁶. Another issue is the development of rooster primers (German: *Hahnenfibeln*) in European countries both in pre-modern and in modern times. In this case, items printed up to the beginning of the 20th century would well be worth a comparative analysis across countries, with a focus on a) the design of one and the same motive, i.e. the rooster as teacher, b) of the rooster's message to the children, often presented as text attached to the picture and c) of overall textbook content. Similarly, a vast number of primers have been published in the 20th century in various countries, including Finland, Estonia and Latvia, providing the opportunity to study the divulgence and design of the rooster on the front covers.

of Studies on Reading Primers and Basal Readers (IBSP), Edited on behalf of the Reading Primers Special Interest Group and in conjunction with MANES, Bonn, Reading Primers Special Interest Group, 2011, <http://www.philso.uni-augsburg.de/de/lehrstuehle/paedagogik/igschub/downloads/International_Bibliography.pdf> (last access: March 14th, 2014).

⁶ One of very few studies published in this area more recently is the chapter *Bukvarnye katechizisy: pol'skie, ukrainsko-beloruskie i moskovskie, XVI-XVIII v.* [Polish, Ukrainian-Belorussian and Moscovite primer catechisms from the 16th to the 18th century], included in M. Korzo, *Ukraininskaja i beloruskaja katechetičeskaja tradicija konca XVI-XVIII vv.: stanovlenie, voljutija i problema zaimstvovanij*, Moskva, s.n., 2007, pp. 477-555.

Pics. 2-5. Rooster primers in German, Finnish/Norwegian, Estonian and Veps languages, 18th to 20th century (from left to right)



Pic. 2. ABC, n.p. (Germany), around 1750, p. 16.

Pic. 3. ABC. *Suomalainen ja Norjalainen Aapis Kirja* [ABC. Finnish and Norwegian primer], Christiania (Oslo), 1864, p. 32.

Pic. 4. *ABD ehk lugemisse ramat* [ABD or reader], Jurjew (Tartu), H. Laakmann 1908, front cover.

Pic. 5. N. Zaiceva, M. Mullonen, *Abekirj* [AB book], Petroskoj (Petrosavodsk), Karjala 1991, front cover.

Second, the body of primers published and used in a particular country is normally not limited to primers in the official or state language. Rather, they often include primers in languages of autochthonous minorities and in languages of migrants. The latter case is basically an issue which should deserve the attention of textbook research at least in the country of origin and in the host country. European immigration to North America, for example, has resulted in the publication and use of primers in the ‘new world’ in a great number of European languages, including – in addition to English, French and Spanish – Belorussian, Czech, Finnish, German, Greek, Latvian, Macedonian, Norwegian, Polish, Rusin, Russian, Slovak, Swedish, Ukrainian. According to IBSP data so far only the Finnish case has found the attention of scholars with an interest in the history of primers⁷.

⁷ Data on languages of primers published in North America are based on the inventory of a private collection of primers. For studies on Finnish primers published in North America see G. London, *Finnish American primers: the abc's of conservative and socialist ideologies*. Oulun Yliopisto Historian Laitos, «Erikoispainossarja», n. 111, 1984, pp. 169-205; L. Kotkaheimo, *Suomalaisaapisia kansainvälisessä taustassaan ja kansainvälisissä yhteyksissään 1600-luvulta 1950-luvulle* [Finnish primers from the 17th century to the 1950s in their international background and international connection], Joensuu, University of Joensuu 1994 (Research Reports of the Faculty of Education, n. 55).

Third, the history of schooling and of literacy instruction is an international phenomenon per se, and therefore comparative studies and, more generally, analytical approaches using a cross-national perspective on primers are a worthwhile endeavour. The search for communalities and differences across countries can not only deliver insights into international developments and into the history of cultural influences across national borders. It can also support a deepened understanding of developments in national or sub-national contexts. This can be exemplified by presenting and commenting on characteristics of an ongoing RP-SIG project on plurilingual primers⁸.

3. The study of plurilingual primers: needs and potentials of international and interdisciplinary research

The plurilingual primer, i.e. the textbook designed as a tool for teaching and acquiring literacy in more than one language, is a special case, hardly considered so far in Europe by historical research on educational media⁹. The project “Plurilingual Primers German-Slavic”, a long-term activity of the RP-SIG focuses on primers with German and at least one Slavic language. Such textbooks have been produced for use in initial literacy instruction in considerable numbers in contact areas of German and Slavic languages in several political systems, primarily in Prussia and in the composite state of the Habsburg Monarchy resp. Austria, and across historical epochs, i.e. from the 17th up to the 20th century.

The project has two general aims: to create and publish a precise bibliography with criteria-led annotations and to produce analyses of different reach in various sub-projects. Whereas the publication of the bibliography is a long-term goal, analyses are prepared and presented in an ongoing process. In particular, the focus on Slavic-German primers allows for

⁸ The term «plurilingual» is used in RPS-communication to designate persons or items with ‘several’ languages (from Latin *plures* = “several”), in the sense of ‘more than one’, but not ‘many’. This is in contrast to «multilingual» = “with many languages”. Consequently, a distinction is made between individual plurilingualism and societal multilingualism. Hence, primers with usually two and in some cases more than two languages are termed as «plurilingual».

⁹ W. Sroka, *Lesen lernen... mehrsprachig! Fibeln und Lesebücher für den mehrsprachigen Schriffterwerb* [Learning to read... in more than one language. Primers and basal readers for plurilingual literacy acquisition], in G. Geißler, W. Sroka, J. Wojdon (edd.), *Lesen lernen... mehrsprachig! Fibeln und Lesebücher aus Europa und Amerika. Katalog zur Ausstellung der Arbeitsgruppe Fibeln (Reading Primers Special Interest Group) der Internationalen Gesellschaft für historische und systematische Schulbuchforschung im Rahmen der Tagung “Mehrsprachigkeit und Schulbuch” vom 22. bis 24.9.2011 an der Freien Universität Bozen in Brixen/Bressanone*, Bonn/Essen, Selbstverlag 2011, pp. 9-14.

- the comparative analysis of a precisely defined set of primers produced in a considerable, yet limited number of language combinations and within a long time frame and in various territories in Central and South Eastern Europe;
- the contextualization of primers, by taking into account the complexity of social, linguistic, political and denominational conditions of literacy instruction and their changes over time;
- a contribution to historical studies in the rise and decline of plurilingual policies in elementary education.

Admittedly, the project excludes primers in other language combinations produced and used in the territories in question, e.g. Lithuanian-German in the case of Prussia and Hungarian-German and Rumanian-German in the case of the Habsburg Monarchy. Nevertheless we trust that the selection of language combinations can shed new light on the history of primers produced and used under conditions of societal multilingualism.

As of June 30, 2014, the project data pool includes 108 titles and 305 editions of primers with German and at least one Slavic language, involving German and eight Slavic contact languages of German: Croatian, Czech, Polish, Russian, Slovak, Slovene, Sorbian and Ukrainian. The language combinations and the respective number of titles are shown in table 1.

Table 1. *Primers with German and at least one Slavic language – language combinations and number of titles*

Language combination	titles (n)
Croatian-German	5
Croatian-German-Latin	6
Czech-German	5
Czech-German-Latin	1
Polish-German	42
Polish-German-French	17
Polish-German-Latin	1
Polish-German-Russian	2
Russian-German	2
Slovak-German	2
Slovak-German-Latin	3
Slovak-German-Hungarian-Latin	1
Slovenian-German	17
Slovenian-German-French	1
Sorbian-German	2
Ukrainian-German-Polish	1
<i>Total</i>	108



Pic. 6. *Imen knisicza za haszen ladanyzkih skol. Namenbüchlein, zum Gebrauche der Landschulen in dem Königreiche Kroazien* [Primer (lit.: booklet of names), for use in rural schools in the Kingdom of Croatia], Ofen (Buda), gedruckt mit königl. Universitätschriften M.DCC.XCVI (1796), title page.



Pict. 7. A.R. Onderka, *Elementarz Polsko-niemiecki oder Polnisch-Deutsches Lesebuch für die utraquistischen Elementarschulen* [Polish-German primer or Polish-German reader for Utraquist elementary schools], Breslau (Wrocław), 11th edition 1867, title page.

In the framework of the project, a basic distinction is made between five types of analyses:

- studies on individual titles;
- comparative studies on several titles with an identical language combination, published within a defined period of time in one territory or country;
- comparative studies on several titles with an identical language combination, published within a defined period of time in several territories or countries;
- comparative studies on several titles with various language combinations, published within a defined period of time in one territory or country;
- comparative studies on several titles with various language combinations, published within a defined period of time in several territories or countries.

Furthermore, a preliminary analytical framework has been elaborated, focusing on four broad issues:

- textbooks: design and content of titles, structure (disposition, arrangement of languages, arrangement of alphabets), teaching objectives, teaching methods, content (text and illustrations), editions and print runs, position in the textbook market;
- context of textbook development: authors/editors/publishers, text history, pupils, teachers, schools and school system;
- context of textbook use: teachers, pupils, schools, supervising authorities (church and state), local and regional elites, contemporary reception of primers, position in the textbook market;
- consideration/interpretation of textbooks in bibliographical and scholarly works.

To cope with all these challenges, the project has from the beginning been designed as an international and interdisciplinary endeavour. While internationality is necessary vis-à-vis the variety of languages and of the historical contexts of textbook production and use, interdisciplinarity is needed to do justice to the specific features of plurilingual primers and of plurilingual elementary education. In particular, these disciplines and sub-disciplines include general history, history of education in relevant regions or countries, policy studies and linguistics (sociolinguistics, historical linguistics, Slavonic studies and German studies). So far, a small group of RP-SIG members from Croatia, Germany, Poland and Russia participate in the project.

Up until 2014 articles of types A and B have been published by members of the project group, all of them related to Polish-German primers and most of them the product of a collaborative effort by scholars from Poland and Germany¹⁰. Collaboration of small teams of authors, sought to assure a certain degree of internationality and interdisciplinarity, is a specific feature of studies made in the context of the project. Additional expertise will be needed to cover language combinations beyond Polish-German, Croatian-German and Russian-German, and also to prepare work on primers published in various territories of the Habsburg Empire.

The conclusion is that the study of the history of reading primers in European and transcontinental areas of education deserves enhanced efforts in international and interdisciplinary cooperation. Readers who are interested in this subject matter should feel invited to express their views and to bring in their expertise.

¹⁰ K.B. Kochan, W. Sroka, *Anton R. Onderka – 19th century advocate of bilingual schooling in Upper Silesia and author of a Polish-German primer*, «Reading Primers International», n. 7, 2012, pp. 13-18; G. Geißler, W. Sroka, *Drei deutsch-polnische Fibeln aus drei Jahrhunderten [Three German-Polish primers from three centuries]*, in A. Augschöll Blasbichler, G. Videsott, W. Wiater (edd.), *Mehrsprachigkeit und Schulbuch. Reihe „Beiträge zur historischen und systematischen Schulbuchforschung*, Bad Heilbrunn, Klinkhardt, pp. 199-232; K.B. Kochan, W. Sroka, *Polish-German primers as tools of bilingual literacy instruction in Upper Silesia, 1840s to 1870s*, in L. Neubauerová, K.B. Kochan, E. M. Skorek (edd.), *Special educational needs in the perspective of speech therapy. Selected issues*, Zielona Góra, Oficyna Wydawnicza Uniwersytetu Zielonogórskiego 2014, pp. 61-80.

*Essays and
Researches*



Saggi e
Ricerche

The 'scientification' of Pedagogy and its consequences. Retrospectives and prospects

Address presented on 12 May 2014 in Milan on the occasion of receiving a *Laurea honoris causa* (Honorary Doctorate) in Pedagogical Sciences awarded by the Faculty of Educational Sciences of the Catholic University of Sacred Heart of Milan*

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ABSTRACT: On 12 May 2014 on the occasion of receiving a *Laurea honoris causa* (Honorary Doctorate) in Pedagogical Sciences awarded by the Faculty of Educational Sciences of the Università Cattolica del Sacro Cuore Milano, Wolfgang Brezinka read the German address (*Lectio*) that is printed here in the English translation. In his *Lectio* Brezinka, on the basis of his deep knowledge of 200 years history of the Austro-German academic pedagogy, debates the process of the 'Scientification' of Pedagogy. He makes a distinction between the on-going improvement in the scientific quality of the pedagogy, and the shifting of teacher training to an academic level, a turn which in few decades has caused an enormous expansion of chairs, which did not correspond to an adequate level of deep knowledge. The A. presents positive and negative aspects of this process, which is linked to secularization and to the loss of religious and moral aims. The A. criticizes the often existing gap between the academic level, more and more pressed towards pure research, and the practical pedagogy, necessary to educational practitioners.

EET/TEE KEYWORDS: Pedagogical Theory; Theory of Science; Principles of Education; History of Education; XVIII-XX Centuries.

* Translated from the German by James Stuart Brice, St. Paul, Minnesota.

I thank the Catholic University and its Faculty of Educational Science for the honor they have bestowed on me with their *Laurea honoris causa* (Honorary Doctorate). They have thereby given me great satisfaction at the end of a long, busy life in the service of pedagogy¹.

I will combine my thanks with a few comments on the special position of pedagogy as an academic subject and on the problems that have arisen through its 'scientification'. I will do this on the basis of my experiences since 1946 as a student and teacher of pedagogy, an educational practitioner and an educational theorist. Since then, in my later years, over the past twenty years, I have devoted critical historical research to the contents and quality of pedagogy at German-speaking universities from the late 18th century up to the present.

In my studies of pedagogy in the Italian provinces of the Habsburg Monarchy, I discovered the excellent research contributions to historical pedagogy made at your university². Initially, I knew the Catholic University of Milan only due to its achievements in psychology and philosophy. Beginning with my first semester of study in Salzburg, we students regarded the founder and for many years Rector Agostino Gemelli (1878-1959) as an internationally significant pioneer of experimental psychology³. I came in contact with pedagogy only much later through Professor Norberto Galli, who won me as a contributor to his excellent journal *pedagogia e vita*. I am happy that my life work is being honored by this university, which has such a high standing scientifically, philosophically and pedagogically.

But now to my topic: *The 'scientification' of pedagogy and its consequences* I will answer four questions on this and in conclusion offer recommendations.

¹ W. Brezinka, *Rückblick auf fünfzig Jahre erlebte Pädagogik*, edited by S. Uhl, Munich, Reinhardt, 1997 (It. ed.: *Ripercorrendo 50 anni di pedagogia vissuta*, «Rinascita della Scuola», vol. XX, n. 1, 1996, pp. 19-23); Id., *Mein Weg zur Pädagogik und meine Beiträge zu ihr*, in Id., Ch. Ritzi (edd.), *Überlieferung und Kritik der Pädagogik. Beiträge von Wolfgang Brezinka aus Österreich und Deutschland in zehn Sprachen. Katalog der Ausstellung*, Berlin, Bibliothek für Bildungsgeschichtliche Forschung, 2003, pp. 7-38 (It. ed.: *Il mio percorso di studi e il mio contributo alla pedagogia*, «Pedagogia e Vita», n. 2, 2002, pp. 10-38).

² Cf. S. Polenghi, *La politica universitaria italiana nell'età della destra storica 1848-1876*, Brescia, Editrice La Scuola, 1993; Ead., *Fanciulli Soldati. La militarizzazione dell'infanzia abbandonata nell'Europa moderna*, Roma, Carocci, 2003; Ead. (ed.), *La scuola degli Asburgo. Pedagogia e formazione degli insegnanti tra il Danubio e il Po (1773-1918)*, Torino, Società Editrice Internazionale, 2012; V. Chierichetti, *I ginnasi e i licei di Milano nell'età della Restaurazione. Professori, studenti, discipline (1814-1851)*, Lecce-Brescia, Pensa MultiMedia, 2013.

³ A. Gemelli, *Selbstdarstellung*, in R. Schmidt (ed.), *Die Philosophie der Gegenwart in Selbstdarstellungen*, Leipzig, Meiner, 1929, Vol. 7, pp. 43-109.

1. What did 'pedagogy' mean in the past?

'Pedagogy' is the theory and practice of education. It has existed as a subject of instruction and study since the Age of Enlightenment in the second half of the 18th century. For a long time, many held pedagogy to be not as much a science as a *teaching of an art*, the art of education⁴. Pedagogy had a practical purpose: the instruction or preparation of teachers, pastoral workers and parents to take the right *educational action*. Its content focused primarily on educational practice, as it was to be useful for pedagogues and contribute to their educational skills.

A 'pedagogue' is a teacher or educator. In German, educators were *Pädagogen* (Italian: *pedagóghi*). Similarly, the teachers of educational skills were *Pädagogiker*⁵ (Italian: *pedagogisti*). Their task was to reflect on, teach about and write on education – today we speak of doing 'educational research'. In English, educational theoreticians are pedagogists or pedagogical theorists, also 'educational theorists', 'educationalists' or 'educationists'. Originally, the two professions of educational *practitioner* and educational *theorist* were closely linked. At universities and teacher-training institutes or seminaries no one could as a rule become a docent (college instructor) in pedagogy without having first proved himself through years of educational practice as a schoolteacher or catechist⁶.

It is self-evident that educational *ability* presupposes educational *knowledge* in the teaching profession, in pastoral care and in the family. In the instructional and study subject of pedagogy, scholars were to assemble and teach that share of the total stock of knowledge that appeared necessary for the fulfillment of educational tasks – not less, but also not more.

⁴ W. Brezinka, *Metatheorie der Erziehung. Eine Einführung in die Grundlagen der Erziehungswissenschaft, der Philosophie der Erziehung und der Praktischen Pädagogik*, 4th ed., Munich, Reinhardt, 1978, pp. 11 ff. (It. ed.: *Metateoria dell'Educazione*, Roma, Armando, 1980, pp. 19 ff.; Engl. ed.: *Philosophy of Educational Knowledge. An Introduction to the Science of Education, Philosophy of Education, and Practical Pedagogics*, Dordrecht-Boston-London, Kluwer, 1992).

⁵ A.H. Niemeyer, *Grundsätze der Erziehung und des Unterrichts für Eltern, Hauslehrer und Schulmänner*, 5th ed., Halle, Waisenhaus, 1805/06, Vol. I, p. 18; E. Richter, *Pädagoge*, in J. Spieler (ed.), *Lexikon der Pädagogik der Gegenwart*, Freiburg, Herder, 1932, Vol. II, p. 530; F. Schneider, *Unterrichten und Erziehen als Beruf*, Einsiedeln, Benziger & Co., 1940, pp. 33 ff.; J. Göttler, *System der Pädagogik*, 8th ed., Munich, Kösel, 1948, p. 13.

⁶ A. Hügli, *Pädagogik*, in *Historisches Wörterbuch der Philosophie*, Basel, Schwabe, 1989, Vol. 7, pp. 1-35; H.-El. Tenorth, *Erziehungswissenschaft*, in D. Benner, J. Oelkers (edd.), *Historisches Wörterbuch der Pädagogik*, Weinheim, Beltz, 2004, pp. 341-382. For Austria cf. W. Brezinka, *Pädagogik in Österreich. Die Geschichte des Faches an den Universitäten vom 18. bis zum 21. Jahrhundert*, 4 vols., Vienna, Verlag der Österreichischen Akademie der Wissenschaften, 2000-2014 (Vol. 1: 2000; Vol. 2: 2003; Vol. 3: 2008; Vol. 4: 2014); Id., *Motive und vorläufige Resultate meiner Studien zur Geschichte des Faches Pädagogik an den österreichischen Universitäten*, «Pädagogische Rundschau», n. 58, 2004, pp. 259-268.

2. *What knowledge is indispensable for pedagogues?*

This depends chiefly on the meaning of the *concept of education*. It means social actions through which the attempt is made to in some regard lastingly improve the personalities of other persons – especially younger people – to maintain components regarded as valuable or to prevent the development of dispositions judged to be bad⁷. Put simply: Education is an attempt at influencing with the intention to help educands acquire and strengthen valuable characteristics.

This requires at least *three types of knowledge*:

First, empirical-diagnostic knowledge of the individual particularities or *is-states* of the *objects of education* (educands) and their life situations. Second, normative knowledge of *educational aims*, i.e., the cultural- and group-specific personality characteristics, attitudes, etc., that should be transmitted to the persons we want to educate. Third, empirical-methodical knowledge of the *means* that could be suitable for this under the given circumstances.

This is an abstract, ideal conception of the content of the pedagogical knowledge needed by educators. But while it is logical and reasonable, it is still just a formal orientation scheme, an abstraction on the highest level that can help in seeking and organizing educational knowledge. Education as a task as well as a fact is only understandable as a means to ends. Educational theories are in principle *ends-means theories*⁸. Therefore, ideals, norms, ought-demands and their world-view foundations play a much greater role in them than in other domains of knowledge – not only as describable facts, but also in an evaluative regard, because of their claims to validity and acceptance.

Already this general reference to the types of knowledge needed for pedagogy raises doubts as to whether it even has the possibility to become a science. At universities, there are still voices that maintain: «Pedagogy is not a science and will never be one». Such doubts are based on the following insight. The mere collection and teaching of various sorts of knowledge of educational objects, educational aims and possible educational means has little value for either educational theories or educational practice, insofar as the *causal relationships* are not known that exist in the real world between the concrete representatives of these three subject groups and many other factors.

⁷ W. Brezinka, *Grundbegriffe der Erziehungswissenschaft*, 5th ed., Munich, Reinhardt, 1990, pp. 70 ff. (It. ed.: *La scienza dell'educazione*, Roma, Armando, 1976, pp. 39-126; English: *Basic Concepts of Educational Science: Analysis, Critique, Proposals*, Lanham-London-New York, University Press of America, 1994).

⁸ W. Brezinka, *Erziehungsziele, Erziehungsmittel, Erziehungserfolg. Beiträge zu einem System der Erziehungswissenschaft*, 3rd ed., Munich, Reinhardt, 1995, pp. 218-258 (It. ed.: *Obiettivi e limiti dell'educazione*, Roma, Armando, 2002, pp. 193-228; Engl. ed.: *Educational Aims, Educational Means, Educational Success: Contributions to a System of Science of Education*, Aldershot, Avebury, 1997).

The two most important questions for teachers and other educators are: 1. *What* should I, and what can I achieve in my concrete students in terms of knowledge and ability here and now, as well as in the future? Or what do I want to accomplish with students? 2. *How* should and can I proceed in order that the intended effects will actually be achieved, and my educational actions will have no lasting negative effects? Sought-for and needed are thus *causal knowledge of the conditions for the success or failure* of education and instruction in concrete situations. These situations are immensely complex, individually different, largely unknown and unknowable.

Anyone who works out the ways how the end-means and causal knowledge would have to be obtained that is necessary for educational success will understand why even today there is still justified doubt about whether pedagogy is even possible as a relatively independent science in the strict sense which would be useful in educational practice. Almost all earlier pedagogical theorists concluded that this was not possible. I merely offer as an example what Friedrich Herbart (1776-1841) wrote on this in 1841. «Pedagogy [...] depends on practical philosophy and psychology. The one shows the aim of education, the other the way, the means, and the impediments»⁹.

In its content, pedagogy thus subsisted largely on borrowings from other subjects and had a *dual character*: It was simultaneously normative and descriptive, philosophical-speculative and empirical. This resulted of necessity from its object, education, and its practical purpose, to acquire educational knowledge for the training of teachers and other educators.

Due to this dual character, it had a *special position* among university subjects. Consequently, it took until the second half of the twentieth century for it to rise from a practical theory of the educational art for future pastors and secondary-school teachers to recognition as a 'science'. From a minor, neglected secondary subject, it quickly became a widely studied main subject at contemporary universities.

What made possible this rapid rise from a pre-scientific practical discipline to an educational *science*? The usual answer is a trendy, fashionable slogan: 'scientification'.

⁹ J.F. Herbart, *Pädagogische Schriften*, edited by O. Willmann and Th. Fritzsche, 3rd ed., Osterwieck, Zickfeld, 1913-1919, Vol. II (1914), p. 10.

3. *What does 'scientification' mean?*

Scientification is an ambiguous word. This is due to the vagueness of the root word 'science' and the various different views of 'scientificity' and its attributes¹⁰.

Starting in the mid-1800s, for about a century pedagogy was taught in a piecemeal fashion as a minor university subject: usually by professors of philosophy, the field to which psychology also belonged. Its contents were a mishmash of everyday knowledge and borrowings from ethics, psychology, intellectual and school history. In comparison with the progress of the empirical sciences and epistemological philosophy, it was considered underdeveloped. Consequently, an effort was made to transform pedagogy into a 'real' science that would be widely recognized as such. It was to become 'scientific'.

'Scientification' in a general sense means: «to raise something to a scientific niveau»¹¹. While this sounds simple, it is not a clearly demarcated program and can mean various different things. I will limit myself to two often-confused meanings of 'scientification'. The first is theory-related, the second professional-political.

For both meanings, we must remember that the words 'science' and 'scientific' are not purely descriptive terms today, but usually value-laden concepts that stand for a higher good. Many people today consider 'science' to be the highest cultural good and may even generalize this quite uncritically. In naive thinking and speaking on the level of the *Zeitgeist* or the spirit of the times, there is an all-encompassing positive evaluation of scientific work and its results, scientific teaching and research institutions, along with their personnel.

In the *theory-related sense*, the 'scientification of pedagogy' means the *improvement of the scientific quality of pedagogical knowledge*. Through critical examination of existing educational theories and systematic research, the attempt should be made to reduce ignorance, correct mistakes and acquire new, better-confirmed knowledge. In this sense, 'scientification' is an ideal program. In practice, it can only succeed more or less unsystematically and provisionally, depending on the object of research. As a task this was and has long been recognized.

In the *professional-political sense*, 'scientification' was, and has meant, nothing more than an *administrative action* with all its consequences: the

¹⁰ S. Körner, *Wissenschaft*, in J. Speck (ed.), *Handbuch wissenschaftstheoretischer Begriffe*, Göttingen, Vandenhoeck, 1980, pp. 726-737; A. Diemer, H. Seiffert, *Wissenschaft*, in H. Seiffert, G. Radnitzky (edd.), *Handlexikon zur Wissenschaftstheorie*, Munich, Ehrenwirth, 1989, pp. 391-399; G. Radnitzky, *Wissenschaftlichkeit*, in *ibid.*, pp. 399-405; S. Meier-Oeser, H. Hühm, H. Pulte, *Wissenschaft*, in *Historisches Wörterbuch der Philosophie*, Basel, Schwabe, 2004, Vol. 12, pp. 902-948.

¹¹ *Duden: Das große Wörterbuch der deutschen Sprache*, Mannheim, Bibliographisches Institut, 1981, Vol. 6, p. 2790.

shifting of professional training programs from technical schools to scientific institutes or universities, thus from the secondary sector of the educational system to the tertiary. Tied to it are higher theoretical demands, lengthened periods of training and increased costs. Aimed at and generally achieved by the concerned professional groups are increases in income and social standing. This improvement was also necessary in the lesser pedagogical professions in times of teacher shortages¹², to make them more attractive for the graduates of the higher schools.

The rise and expansion of the subject of pedagogy at universities is largely due to this 'scientification' in the professional-political sense. Teacher training was for political reasons 'scientificated' on the foundation of pedagogy, even before a solid educational science existed. This did not result from a sudden tidal-wave of outstanding educational scientific achievements after 1960, but rather there were professional-political causes which academicized the training of compulsory-school teachers in most European states. This suddenly created an enormous instructional need at universities and new teachers colleges for a pedagogy that was supposed to have, or at least seem to have, a scientific niveau. As a science, the subject was not sufficiently mature for this, and educational-scientifically highly qualified personnel were for the most part lacking. That was the situation in which, for example, the number of professorships in the subject of pedagogy rapidly increased at West German higher educational institutions: from 23 in 1960 to 1,054 in 1983¹³.

Politically, the academization of compulsory-school teacher training was justified by the following argument¹⁴: 1. In recent years pedagogy has achieved the quality and rank of a recognized science; 2. teachers at all types of schools are so important for the education and instruction of the younger generation that they deserve the best pedagogical training; 3. the most useful means for this is the academic study of educational science.

The academization of compulsory-school teacher training was thus professional-politically useful and school-politically successful, because it eliminated the teacher shortage and improved the school system. Its justification contains, however, two mistaken conclusions. First, pedagogy was and still is far from being an established science. Second, it was an illusion that intensive educational-*scientific* studies are an effective way to produce good teachers. Already the first German Professor for Pedagogy, Ernst Christian Trapp, realistically concluded in 1780: «The usual scholarliness can do so little with

¹² P. Posch, *Der Lehrermangel. Ausmaß und Möglichkeiten der Behebung*, Weinheim, Beltz, 1967.

¹³ Brezinka, *Pädagogik in Österreich*, cit., Vol. 4 (2014), p. 888.

¹⁴ W. Brezinka, *Erziehung und Pädagogik im Kulturwandel*, Munich, Reinhardt, 2003, pp. 170 ff. (It. ed.: *Educazione e pedagogia in tempi di cambiamento culturale*, Milano, Vita e Pensiero, 2011, pp. 155 ff.).

education that it is rather more harmful, and is the more harmful, the greater it is»¹⁵.

These two illusions about the state of educational science and its usefulness for teachers served about 50 years ago as an educational-theoretical justification for shifting all teacher-training to scientific institutes and universities. The academization of the training of compulsory-school teachers has accelerated the 'scientification' of pedagogy – in good and bad senses. In a good sense, this means having advantages for pedagogues, research, and the differentiation, specialization and expansion of their discipline. 'Scientification' in the bad sense includes among other things disadvantages for pedagogues due to overburdening with far too much useless knowledge at the expense of training in educationally practical skills¹⁶.

How did this come about? In order to prove the 'scientificity' of the new academic teacher training programs, institutes and universities changed the makeup of their teaching personnel. Earlier teacher trainers came from the ranks of teachers. Before they could become teacher trainers, they first had to prove themselves in school practice and complete additional programs in pedagogy and psychology. In the ideal case, the following criteria applied to this: long years of pedagogical mastery; broad scientific competence, but with a concentration on core knowledge that would be useful in professional practice; good understandability and a stimulating manner of teaching; social competence and leadership quality.

It was essential that future teacher trainers had chosen instruction and education as a professional career and were familiar with the profession from within through personal experience with many different school problems. This type of teacher trainer has in the meantime nearly died out. Today professors dominate who are unfamiliar with schools or have fled from the schools, who have chosen educational-scientific work as their professional career. Thereby suitability as a scholar has become the first selection criterion for pedagogues¹⁷. The old professional field has been replaced by a modern one: the practically seasoned teaching-master of the educational art has been superseded by the educational-science researcher.

This change has the following disadvantage for teacher training: Optimal scientific-theoretical competence is seldom coupled with optimal pedagogical-

¹⁵ E.C. Trapp, *Versuch einer Pädagogik. Unaltered reprint of the first edition, Berlin 1780*, made available by Ulrich Herrmann, Paderborn, Schöningh, 1977, p. 371.

¹⁶ On the limits of the scientification of teacher-training cf. E. Terhart, *Lehrerberuf und Lehrerbildung. Forschungsbefunde, Problemanalysen, Reformkonzepte*, Weinheim, Beltz, 2001, pp. 165 ff.

¹⁷ Brezinka, *Erziehung und Pädagogik im Kulturwandel*, cit., pp. 142 f., 150 ff.; Id., *Erinnerungen an die Gründungszeit der Pädagogischen Hochschule Würzburg 1958-1960*, «Pädagogische Rundschau», n. 62, 2009, pp. 409 f. (also in «Rassegna di Pedagogia», n. LXVIII, 2010, pp. 139-147).

professional effectiveness. Interest in research is seldom combined with a love of the teaching profession and an ability to stimulate the interest of professional beginners year after year and to bring them into teaching without unproductive scientific research engagement.

4. *What are the consequences of the 'scientification' of pedagogy?*

It directly affects the *contents of the subject*, especially its teaching material. Indirectly, 'scientification' has consequences for *teaching personnel* and the *students* of pedagogy, their pedagogical knowledge and action.

The first consequence is an *unlimited expansion of the object of pedagogy*. It has, for one thing, become an extremely confusing subject, lacking systematic organization and clear boundaries. In content and method, it has fragmented into a variety of different sub-disciplines, special areas and orientations that are not logically connected to each other and the whole. There is no synthesis in the German-speaking countries, no system, no canon of core pedagogical knowledge.

Thereby historical links have been lost with the older practical pedagogy and its criteria for the distinction between useful and irrelevant educational knowledge. Today, we will be disappointed if we search for basic knowledge of the subject that is *worth knowing*. The superset of information stored in texts and computers is far too vast and confusing to be able to gain a clear overview of the whole of pedagogy and its broad common foundation. The encyclopedia has replaced the ordered system; we have the lexical compilation of disparate partial knowledge.

This deficiency is a result of increased *research* by the greater numbers of personnel required to do research, without sufficiently understanding the special status of pedagogy and its foundations. The research personnel include not only professors and their assistants, but also their students: the vast legions of university students who are to demonstrate their research achievements with diploma or masters theses and dissertations. To reach this goal, far more suitable research topics are needed than are available. That is one of the reasons why the subject has been inundated with pseudo-knowledge, banal, unsubstantial and useless topics and texts.

One factor that has contributed to the expansion of the object of pedagogy is that real educational phenomena are complicated by countless variants with innumerable other phenomena of nature and culture. As well thoughts, wish images, ideal conceptions of education and norms for pedagogy have a multiplicity of relationships to religious, world-view, moral, political, economic and other ideas. They are also contingent on societal conditions, including the family structure, economic system, state constitutions and their transformations.

Educational phenomena like ideas about education are thus especially rich in preconditions and can have a wide range of consequences in many regards.

Therefore, it was hardly avoidable that by promoting the search for new topics, the ‘scientification’ of pedagogy has culminated in a *research mania* that is incompatible with the practical aim of the subject and its limits. One thinks only of the naïve imitation of the natural sciences and the endlessly exaggerated mathematization or quantification of the subject with their meager results.

Above all, two simple truths were ignored which, in his 1852 book *The Idea of a University*, John Henry Newman still assumed «can be taken for granted». One is: «To discover and to teach are distinct functions; they are also distinct gifts, and are not commonly found united in the same person». The other: The «great object» of a university is to make something of its students (in our case good teachers) «and not simply to protect the interests and advance the dominion of Science»¹⁸.

The result of ignoring these principles is a confused muddle, an unbounded *hodgepodge* of everyday knowledge, historical contributions, philosophical speculations, poetic insights and empirical scientific fragments drawn from various different subject fields. A serious processing of such an amorphous mass of ideas through a critical examination and selection of the essential is hardly possible – neither for teachers nor for students.

A second result of the ‘scientification’ of pedagogy is *normative failures and losses*. This happens of necessity when we try to subject pedagogy as a whole to the rules of validity applicable in the empirical sciences. Then the scientific description and explanation of educational reality shifts to the focus of attention – the descriptive analysis of the factors that play a role in it, their relationships and effects. What matters thereby are facts and the observation and calculation of occurrences.

The facts self-evidently include as well the evaluations, aim conceptions and ideals of the acting persons, as well as the aims and norms of the participating institutions. These are drawn on in empirical pedagogy, but only for the description and explanation of educational phenomena, in order to understand and compare the motivations of educators and their clients. They belong to the factual knowledge of educational situations and their historical particularities¹⁹.

Inevitably, the ‘scientification’ of pedagogy has caused religious, moral and other belief-specific ideals to be devaluated rationally and ideology-critically, ignored or combated. In normative matters, ‘scientification’ also means worldliness, secularization, rationalization and historicization.

¹⁸ J.H. Newman, *Kirche und Wissenschaft* (1852), Grünewald, Mainz, 1927, pp. 5 f. (English: *The Idea of a University: Defined and Illustrated*, Notre Dame, University of Notre Dame Press, 1982, p. xl f.

¹⁹ Brezinka, *Metatheorie der Erziehung. Eine Einführung in die Grundlagen der Erziehungswissenschaft, der Philosophie der Erziehung und der Praktischen Pädagogik*, cit., pp. 65 ff. and 92 ff.

When there is a purely scientific interest in discovering new knowledge, there is a neglect of ideals and norms, including decisions and normative definitions or prescriptions for the objects of education, as well as for educators. These are the most important matters, however, and for practical reasons! It is the purpose of education to influence the personality, experience and behavior of educands. This presupposes educational aims, value judgments and norms or ought-sentences that express commands, prohibitions and duties²⁰. These are not derivable from sentences that describe facts. They are based on not only empirical knowledge, but also on world-view and moral convictions, belief contents and value attitudes that cannot be judged to be true from an empirical scientific viewpoint. In the words of Max Weber: «An empirical science can teach no one what he *should*, but only what he *can* and – under circumstances – what he *wants* to do»²¹.

Without clarity on educational aims and their order of priority, without their internalization in convictions and virtues, in knowledge and ability, and in the educator's lifestyle, such aims can have little educational influence. In modern pluralistic societies with a strong individualization of citizens, extensive freedom of choice and many alternatives to choose among, along with extreme sensory overload, there is a great need for normative pedagogical orientation assistance²². This need cannot be satisfied by empirical educational science, and just as little by a 'scientificated' hodgepodge pedagogy.

This points to a third consequence of 'scientification': the *estrangement of pedagogists and pedagogues, of educational theorists and educational practitioners*. These professionals live in different professional worlds, have different interests and speak different languages. We have lost the sense of belonging to a common profession as 'teachers and educators'.

I have already named the professional-political reasons for this: the replacement of professionally experienced and school-practice oriented teacher trainers by professionally *inexperienced*, research-oriented scientists. Research demands specialization, which is steadily increasing under the pressure of publication requirements, competition and evaluations. But in research only research can be practiced, not instruction and educating – and as well there cannot be the best possible professional training of teachers and educators.

²⁰ *Ibid.*, cit., pp. 211 ff.; and Id., *Glaube, Moral und Erziehung*, Munich, Reinhardt, 1992 (It. ed.: *Morale ed educazione. Per una filosofia normativa dell'educazione*, Roma, Armando, 1994; Engl. ed.: *Belief, Morals, and Education*, Aldershot, Avebury, 1994).

²¹ M. Weber, *Die "Objektivität" sozialwissenschaftlicher und sozialpolitischer Erkenntnis* (1904), in *Methodologische Schriften. Besorgt von Johannes Winckelmann*, Frankfurt am Main, S. Fischer, 1968, p. 6. For interpretation and critique cf. Wolfgang Stegmüller, *Wertfreiheit, Interesse und Objektivität. Das Wertfreiheitspostulat von Max Weber*, in W. Stegmüller, *Rationale Rekonstruktion von Wissenschaft und ihrem Wandel*, Stuttgart, Reclam, 1979, pp. 177-203.

²² Cf. Brezinka, *Erziehung in einer wertunsicheren Gesellschaft*, 3rd ed., Munich, Reinhardt, 1993 (It. ed.: *L'educazione in una società disorientata. Contributi alla pratica pedagogica*, Roma, Armando, 1989).

This has fallen victim to the ‘scientification’ of pedagogy. A program conceived as a political means to improve the pedagogical training, income and social standing of teaching staffs has led to their turning away from university pedagogy. The latter has already been regarded for three decades as a science of use only «for specialists, but not for practice». It has «still only a little to do with teacher-training» because it is «primarily a professional science for scientists»²³.

In the meantime, pedagogy is, however, still wasting away in the main-subject study programs. Of educational science in the German universities, a 2012 report stated that it was still a «discipline in search of an identity». It finds itself «in retreat» and is «increasingly less visible in the university system»²⁴.

That holds not only for Central Europe, but also for the USA. I recall merely a history of American educational research published in 2000 by Ellen C. Lagemann. It has the fitting title: *An Elusive Science. The Troubling History of Education Research*²⁵. This means: ‘a science that is incomprehensible’ and has a ‘gloomy history’. The crisis of ‘scientificated’ pedagogy thus appears to be international. It consists in the «loss of its meaning for life»²⁶, in the lack of usefulness for educational practice and the educator’s way of life.

²³ D. Neumann, J. Oelkers, “*Verwissenschaftlichung*” als Mythos? Legitimationsprobleme der Lehrerbildung in historischer Sicht, «Zeitschrift für Pädagogik», n. 30, 1984, pp. 229-252, in partic. pp. 241 and 246. As early warnings cf. also W. Brezinka, *Von der Pädagogik zur Erziehungswissenschaft*, Weinheim, Beltz, 1971, pp. 163 ff.; A. Stüttgen, *Das Dilemma der Erziehungswissenschaft. Verwissenschaftlichung und Praxisverlust in der Pädagogik*, Ratingen, Henn, 1975; W.S. Nicklis, *Versuch einer Theorie der Lehrerbildung und der Gestaltwandel der Universität*, Frankfurt am Main, Lang, 1988.

On the contemporary situation cf. the conclusion of the General Secretary of the Educational Ministers Conference of the Federal Republic of Germany, Prof. Erich Thies, «Teacher education is [...] as a rule the most desolate area of university training»; «The integration of the pedagogical institutes (teacher-training schools) into the universities under the auspices of ‘science’ (above all, however, for salary reasons) had the result that [...] for professors and students the professional orientation was largely lost»; «Even with educational scientists and subject teachers it was to be seen that the interest in the furthering of one’s own subject science is stronger than that in a profession-specific training of teacher-position candidates» (*Lehrerbildung an den Hochschulen – 18 Behauptungen*; Engl. ed.: *Teacher-training at the institutes of higher education – 18 assertions*), in W.A. Herrmann, M. Prenzel (edd.), *Bildung und Ausbildung an den Hochschulen in Deutschland. Publications of the Hanns Martin Schleyer-Stiftung*, Cologne, [s.n.], 2011, Vol. 78, pp. 75 f.; Brezinka, *Pädagogik in Österreich*, cit., Vol. 4 (2014), pp. 891 ff. and 94 ff.

²⁴ C. Grunert, *Erziehungswissenschaft auf dem Rückzug? Erziehungswissenschaftliche Hauptfachstudiengänge im Bologna-Prozess*, «Erziehungswissenschaft. Mitteilungen der Deutschen Gesellschaft für Erziehungswissenschaft», vol. 23, n. 45, 2012, pp. 40-45; Id., *Erziehungswissenschaft im Spiegel ihrer Studiengänge*, «Zeitschrift für Erziehungswissenschaft», n. 15, 2012, pp. 573-596.

²⁵ E. Condliffe Lagemann, *An elusive science. The troubling history of education research*, Chicago and London, University of Chicago Press, 2000.

²⁶ E. Husserl, *Die Krisis der europäischen Wissenschaften und die transzendente Phänomenologie. Eine Einleitung in die phänomenologische Philosophie*, 2nd ed., Hamburg, Meiner, 1982, p. 3.

Insofar as I can see, the crisis resulted from two misconceptions. We could also say: from illusions and unfulfillable promises. The first misconception was the belief that an independent empirical science of educational phenomena as a whole was possible and quickly achievable. The second misconception was the belief that the personnel of 'scientificated' pedagogy should and could conduct highly specialized research and at the same time provide the best possible training for the educators of children and youth.

5. *What do I recommend in this situation?*

Above all, there should be a turning away from the ideal of a «pedagogical grand theory»²⁷ or a unity of empirical, philosophical and normative-practical knowledge of education with a claim to scientificity. In a single theoretical system it is simply impossible to achieve simultaneously scientific, morally-foundational and practice-guiding goals. This ideal has led to a 'hodgepodge pedagogy' that neither meets scientific standards nor has value in educational practice. Today, however, all the subjects taught at universities are considered to be 'sciences'. Therefore, there is no prospect to change this imprecise linguistic practice.

It is urgently necessary and quite possible, however, to distinguish under the generic term 'pedagogy' among *three main types of pedagogical theory*: Empirical educational science, philosophy of education and practical pedagogy²⁸. These have different tasks, contents and discourse forms.

I cannot at this point go into the problematic of empirical educational science and the philosophy of education. It is uncertain what developments these fields will undergo. I am concerned, however, about the pressure to acquire ever more new specialized knowledge through research, instead of first endeavoring to know, clarify, evaluate and transmit the most important old and elementary knowledge. This threatens to lead more to a loss of basic pedagogical knowledge than to essential advances in knowledge.

In terms of educational policy in our culture, the most important thing for the state and the society is not empirical educational science, but rather a

²⁷ H. Bokelmann, *Pädagogik: Erziehung, Erziehungswissenschaft*, in J. Speck, G. Wehle (edd.), *Handbuch pädagogischer Grundbegriffe*, Munich, Kösel, 1970, Vol. II, pp. 178-267, in partic. pp. 227 ff.

²⁸ Brezinka, *Metatheorie der Erziehung. Eine Einführung in die Grundlagen der Erziehungswissenschaft, der Philosophie der Erziehung und der Praktischen Pädagogik*, cit., pp. 25 ff.; Id., *Empirische Erziehungswissenschaft und andere Erziehungstheorien: Differenzen und Verständigungsmöglichkeiten*, in Id., *Aufklärung über Erziehungstheorien. Beiträge zur Kritik der Pädagogik*, Munich, Reinhardt, 1989, pp. 322-336 (Italian: *La pedagogia empirica e le altre teorie dell'educazione: divergenze e possibili convergenze*, «Rinascita delle scuole», vol. XI, n. 5, 1991, pp. 333-342).

realistic and solid *practical pedagogy*²⁹ as a basis for the professional training of teachers and other educators. This should be as simple, clear and understandable as possible. It should not orient itself to the professional fields of educational *researchers*, but rather to the tasks of educational *practitioners*, their duties and action possibilities in concrete life worlds. For this we need evaluations and norms, rules, guidelines and recommendations that go beyond scientific knowledge and have worldview and moral foundations.

Practical pedagogy must concentrate on the chief issues: 1. an evaluative interpretation of the contemporary societal-cultural situation in regard to the need for, possibilities, and difficulties of good education; 2. the concrete educational aims and their hierarchy that are imperative in this situation; 3. the possible means for achieving these aims under the given conditions; 4. the professional ethos and the professional virtues of teachers and educators.

Insofar as there is scientific knowledge that could be useful for the fulfillment of the respective tasks, it should be drawn upon. To make a selection, however, we need critical discernment, a feeling for the essential and the courage to express ideas simply, in a generally understandable language.

However, much more is needed than just factual knowledge and reasoning ability. Those who are to prepare teachers and educators for their profession are not solely responsible for the theoretical education of their students. They are also responsible for their ability to contribute to their pupils' education in values, character and social sensitivity³⁰. Thereby it is a question of value positions and emotional ties to faith- and cultural-goods that make it possible to find meaning and joy in life. Dependent on such values, attitudes, basic convictions and virtues for educands are also their educability, readiness to learn, and ability for interpersonal contact and love.

To a historically unprecedented extent, these fundamental teaching and educational tasks have been neglected in a 'scientificated pedagogy' through rationalistic, scientist one-sidedness. Urgently needed in this field is a 'de-scientification' of pedagogy. Without taking into account the polarity of reason and spirit, knowledge and belief, 'head' and 'heart', neither good education nor a realistic educational theory is conceivable. At a university that bears the symbol of the heart in its name, there can hardly be any doubt about this.

²⁹ Brezinka, *Metatheorie der Erziehung. Eine Einführung in die Grundlagen der Erziehungswissenschaft, der Philosophie der Erziehung und der Praktischen Pädagogik*, cit., pp. 236 ff.

³⁰ Brezinka, *Erziehung in einer wertunsicheren Gesellschaft*, cit., pp. 61 ff.; Id., *Glaube, Moral und Erziehung*, cit., pp. 45 ff. and 142 ff.; Id., 2003, cit., pp. 14 ff. and 72 ff.; A. Hügli, *Werterziehung; moralische Erziehung, Moralpädagogik*, in *Historisches Wörterbuch der Philosophie*, Basel, Schwabe, Vol. 12 (2004), pp. 291-609.

La *Rethorica ecclesiastica* e l'*Omiliario* per la Chiesa ambrosiana scritti da Agostino Valier su istanza di Carlo Borromeo

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The Rethorica ecclesiastica and the Homiliae for the Ambrosian rite, written by Agostino Valier upon request of Carlo Borromeo

ABSTRACT: As part of a series of studies on the Tridentine pastoral, this article aims to analyze the main pedagogical directions which guided the education of the clergy in caring for souls in the ministry of the Word after the Council of Trent, by examining two works written by the bishop of Verona Agostino Valier, at the request of the Archbishop of Milan, Carlo Borromeo: the *De rhetorica ecclesiastica ad clericos libri* and the *Homiliae in Evangelia secundum ritum Ambrosianum*. The article reconstructs the genesis of these works through analysis of the correspondence between the two prelates and studies their contents and purposes, with attention to the more general process of the regeneration of preaching as *praecipuum munus* of the bishop and clergy in *cura animarum* promoted in the aftermath of Trent.

EET/TEE KEYWORDS: History of Education; Christian Education; Catholicism; Italy; XVI-XVII Centuries.

Introduzione

La predicazione fu una delle questioni nodali dibattute durante il Concilio di Trento, che si trovò a deliberare su questa materia nella fase iniziale, più precisamente nella V sessione del 17 giugno 1546, quando fu approvato il decreto *Super lectione et praedicatione*, e diciassette anni dopo, nella penultima sessione dell'11 novembre 1563, nel corso della quale fu emanato il canone IV del *Decretum de reformatione*, al fine di rendere i canoni stabiliti precedentemente

«aptius praesentium temporum usi»¹. Entrambi i decreti, se pure all'interno di quadri di riferimento molto diversi (visto che il primo accostava la predicazione alla lettura del Vangelo, mentre il secondo ai «rudimenta fidei»), avevano assegnato un ruolo centrale alla predicazione nel processo di trasmissione delle verità di fede, conferendo un primato specifico al vescovo e al clero in cura d'anime nell'esercizio di questo compito, ma lasciavano aperte tante questioni inerenti proprio il piano dell'effettiva attuazione di tale *officium*. A questo riguardo John O'Malley ha giustamente fatto notare come, se è vero che «Trento aveva indicato nella predicazione il *praecipuum munus* del vescovo e, per estensione, di qualunque pastore, [... dall'altro, di fatto] non esisteva alcun corpus letterario accreditato paragonabile alle *artes praedicandi* degli scolastici medievali, capace di spiegare come tradurre in opera il principio teorico affermato in modo confacente alla sensibilità estetica e religiosa degli uomini del tempo»².

In effetti, andavano definite le coordinate di ordine normativo e teorico entro le quali il ministero della predicazione poteva essere concretamente esercitato³. Si trattava, in sostanza, di delineare il modello di predicazione post-tridentina e in questo, come anche negli altri ambiti di intervento del governo episcopale, fu esemplare l'azione dell'arcivescovo di Milano Carlo Borromeo⁴.

¹ Per i testi dei decreti: *Conciliorum Oecumenicorum Decreta*, a cura di G. Alberigo, G.A. Dossetti, P.P. Joannou, C. Leonardi, P. Prodi, Bologna, EDB, 1984, *Decretum secundum: super lectione et praedicatione* (Sessio V, 17 iun. 1546), pp. 669-670; *Decretum de reformatione*, canon IV (Sessio XXIV, 11 nov. 1563), p. 763. Per un'analisi dei contenuti dei decreti: R. Rusconi, *Rhetorica ecclesiastica. La predicazione nell'età post-tridentina fra pulpito e biblioteca*, in G. Martina, U. Dovere, *La predicazione in Italia dopo il Concilio di Trento tra Cinquecento e Settecento. Atti del X Convegno di Studio dell'Associazione Italiana dei Professori di Storia della Chiesa, Napoli 6-9 settembre 1994*, Roma, Edizioni Dehoniane, 1996, pp. 18-24; Id., *Predicatori e predicazione, in Storia d'Italia*. Annali 4: C. Vivanti (ed.), *Intellettuali e potere*, Torino, Einaudi, 1981, pp. 995-1006. Rimangono di grande utilità, anche se non recentissime, le rassegne bibliografiche sulla predicazione post-tridentina di: E. Ardissimo, *Rassegna di studi sulla predicazione post-tridentina e barocca (1980-1996)*, «Lettere italiane», vol. XLIX, n. 3, 1997, pp. 481-517; S. Giombi, *Precettistica e trattatistica sulla retorica sacra in età tridentina*, «Rivista di storia e letteratura religiosa», n. XXXIV, 1998, pp. 581-612.

² J.W. O'Malley, *Saint Charles Borromeo and the "praecipuum Episcoporum Munus": His Place in the History of Preaching*, in Id., *Religious Culture in the Sixteenth Century. Preaching, Rhetoric, Spirituality, and Reform*, Aldershot, Variorum, 1993, pp. 140-156; *San Carlo ed il «praecipuum episcoporum munus»*, in F. Buzzi, D. Zardin (edd.), *Carlo Borromeo e l'opera della «grande riforma». Cultura, religione e arti del governo nella Milano del pieno Cinquecento*, Cinisello Balsamo, Silvana editoriale, 1997, p. 64.

³ Per un panorama sui trattati *de praedicatione* del XVI secolo si vedano: J.W. O'Malley, *Content and Rhetorical forms in Sixteenth-Century treatises on preaching*, in J. Murphy (ed.), *Renaissance eloquence. Studies in the theory and practice of Renaissance Rhetoric*, Berkeley-Los Angeles-London, University of California Press, 1983, pp. 238-252; F.J. McGinness, *Right thinking and sacred oratory in Counter-Reformation Rome*, Princeton, Princeton University press, 1995, in partic.: cap. II, pp. 29-61.

⁴ Cfr. O'Malley, *San Carlo ed il «praecipuum episcoporum munus»*, cit., pp. 59-68; Giombi, *Precettistica e trattatistica sulla retorica sacra in età tridentina*, cit., pp. 581-601; Id.,

Egli si fece promotore di un vasto e articolato programma di promozione del ministero della parola, per cui non solo si guadagnò la fama di predicatore infaticabile e, nel contempo, di instancabile 'procacciatore' di predicatori rinomati per la sua Chiesa, ma fu anche il firmatario delle note e fortunate *Instructiones praedicationis verbi Dei*, emanate in occasione del terzo concilio provinciale milanese del 1573⁵, e, non da ultimo, fu il patrocinatore dei trattati di retorica ecclesiastica più importanti del periodo post-tridentino e di scritti teorico-precettistici e omiletici volti a promuovere e orientare l'attività di predicazione ordinaria del clero in cura d'anime. Tra questi ultimi si possono annoverare anche i *De rhetorica ecclesiastica ad clericos libri* e le *Homiliae in Evangelia secundum ritum Ambrosianum* di Agostino Valier, il cui percorso di elaborazione costituisce una delle testimonianze più significative di quella tensione costruttiva che animò il mondo cattolico uscito da Trento, impegnato a definire, anche attraverso una produzione scritta estremamente variegata, le diverse *facies* della *societas christiana* prospettata nei decreti conciliari.

1. «*Mi sforzerò di dar precetti più universali, più certi, e più facili che mi sia possibile*»: *genesis, contenuti e fortuna dei De rhetorica ecclesiastica ad clericos libri*

L'opera del vescovo di Verona Agostino Valier, come spiega egli stesso nella sua autobiografia *De cautione adhibenda in edendis libris*, prese le mosse da alcune precise domande a lui rivolte da Carlo Borromeo: «Cur etiam pro tua pastoralis cura, et pro caritate tua in ecclesiam Dei, praecepta quaedam dicendi non accomodas ad usum ecclesiae? Cur ecclesiasticam non conscribis rhetoricam?»⁶. Tali domande lasciavano intuire la portata di una richiesta che si

La predicazione di san Carlo: fonti, metodo, stili, in Buzzi, Zardin (edd.), *Carlo Borromeo e l'opera della «grande riforma»*, cit., pp. 69-80; C. Delcorno, *Dal «sermo modernus» alla retorica «borromea»*, «Lettere italiane», vol. 39, n. 4, 1987, pp. 466-483.

⁵ Carlo Borromeo, *Instructiones praedicationis Verbi Dei*, in *Acta Ecclesiae Mediolanensis, tribus partibus distincta*, Mediolanum, apud Pacificum Pontium, 1582 (d'ora in avanti cit.: AEM 1582), pars II, cc. 212v-221r. Per un'analisi dei contenuti dell'opera: Giombi, *La predicazione di san Carlo*, cit., pp. 72-75.

⁶ Il *De cautione adhibenda in edendis libris* fu edito per la prima volta a Padova nel 1719 presso la tipografia Volpi-Cominiana. Attualmente è disponibile un'edizione commentata del testo curata da Giovanni Cipriani, *La mente di un inquisitore: Agostino Valier e l'Opusculum De cautione adhibenda in edendis libris (1589-1604)*, Firenze, Nicomp, 2009, pp. 194-294. Questa edizione si basa su un manoscritto dell'opera conservato presso la Biblioteca Universitaria di Padova (Ms. 27), recante l'indicazione «Veronae anno MDC4». Rispetto alla versione pubblicata nel 1719, l'edizione curata da Cipriani risulta arricchita di una parte finale ulteriore, nella quale il Valier dà conto di alcune tra le più importanti opere da lui scritte tra il 1589 e il 1604. Le citazioni del presente lavoro sono tratte da questa edizione moderna, che in seguito sarà indicata come Valier, *De cautione*; il passo riportato sopra è tratto dal cap. XXXIII, p. 229.

mostrava sin da subito molto impegnativa, tant'è che, sempre nel *De cautione*, il Valier ricordava senza infingimenti, come inizialmente avesse provato più volte a declinare l'invito, facendo presente che il tema era già stato affrontato in modo esaustivo da sant'Agostino nel quarto libro del *De doctrina christiana* e che egli non si sentiva in grado di competere con un modello che riteneva insuperato. Questo scritto di sant'Agostino, come ha ricordato Marc Fumaroli, fu una delle fonti più significative della cultura europea dei secoli XVI e XVII, insieme all'*Ecclesiastes* di Erasmo⁷ e, sebbene in quest'ultimo caso i riferimenti non furono certo espliciti, si può dire che a queste due opere guardarono in modo particolare i trattati di retorica ecclesiastica commissionati o fatti pubblicare dal Borromeo, incluso quello del Valier. Il vescovo di Verona, infatti, alla fine, complice anche l'intervento del vecchio compagno di studi padovani Francesco Adorno⁸ – che avrebbe avuto una parte importante anche nella revisione del trattato –, accolse la richiesta dell'arcivescovo di Milano, mettendo grande impegno e dedizione in questo nuovo lavoro, pienamente consapevole del fatto che «sarebbe stato in ogni caso un *primum*, quali che fossero risultati i suoi debiti nei confronti delle opere che l'avevano preceduto»⁹.

L'opera rappresentava una delle prime imprese letterarie realizzate dal Valier su istanza dell'arcivescovo di Milano, che nel corso degli anni del suo lungo governo arciepiscopale ricorse in diverse occasioni alle straordinarie e ben note capacità scritte del vescovo di Verona, per mettere a punto strumenti scritti capaci di veicolare aspetti specifici del suo vasto ed articolato progetto pastorale. D'altra parte, quella del ricorrere alle penne altrui fu una delle caratteristiche e, se vogliamo, anche dei punti di forza del 'modo di procedere' borromeo, tanto che, a questo riguardo, nella sua *Vita Caroli Borromaei* il Valier ricordava come l'arcivescovo di Milano «in scribendo aliorum opera libentius utebatur; adhibebat tamen semper iudicium, quod tantum in corrigendis scriptionibus adhibere erat solitus ut praestantes ingenio et doctrina viros in admirationem traheret»¹⁰.

Il vescovo di Verona iniziò a dedicarsi alla scrittura dell'opera commissionata dal Borromeo nel 1571¹¹. In una lettera del 1° ottobre di quell'anno, infatti,

⁷ Cfr. M. Fumaroli, *L'âge de l'éloquence: rhétorique et res literaria de la Renaissance au seuil de l'époque classique*, Genève, Droz, 1980 (trad. it. *L'età dell'eloquenza: retorica e res literaria del Rinascimento alle soglie dell'epoca classica*, Milano, Adelphi, 2002, pp. 59-66, 102-108).

⁸ Valier, *De cautione*, cap. XXXIII, p. 229.

⁹ O' Malley, *San Carlo ed il «praecipuum episcoporum munus»*, cit., p. 64.

¹⁰ Agostino Valier, *Vita Caroli Borromaei Card. S. Praxedis Archiepiscopi Mediolani. Item opuscula duo Episcopus et Cardinali san Augustino Card. Veronae conscripta*, Veronae, apud Hieronymum Discipulum, 1586, p. 49. Nell'edizione consultata, curata da Silvio Antoniano e dedicata al card. Andrzej Batory, insieme alla *Vita Caroli Borromaei*, furono pubblicate altre due opere del Valier scritte prendendo a modello proprio l'arcivescovo di Milano, ovvero l'*Episcopus* ed il *Cardinalis*.

¹¹ Il processo di composizione e revisione dell'opera è stato in parte ricostruito nell'introduzione all'edizione degli *Arbores De Paschate* di Carlo Borromeo (Roma, Edizioni Storia e Letteratura,

scriveva all'arcivescovo di Milano: «Non voglio restar di dirle che spero per Natale di mandarle un poco di mostra di quel tanto che la mi commise che dovessi scrivere»¹². La prima stesura fu realizzata in tempi abbastanza contenuti, se si considera il fatto che già il 3 febbraio 1572 il Valier poteva annunciare al Borromeo che «Mons.r R.mo di Famagosta», vale a dire Girolamo Ragazzoni, presto lo avrebbe raggiunto a Milano per «dare conto dell'opera incominciata di ordine di lei, et finita hoggi con l'agiuto del S. Dio». L'opera, tuttavia, non poteva dirsi compiuta e di questo ne era consapevole innanzitutto l'autore, che nella stessa lettera in cui comunicava la conclusione della prima bozza, aggiungeva: «trascriverò [l'opera] di mia mano potendo, et la manderò quanto prima haverà bisogno di esser riveduta et accresciuta da homini dotti e di giudizio dei quali si trova gran numero in Milano»¹³.

Il processo di revisione del *De rhetorica ecclesiastica*, in effetti, fu tutt'altro che breve e impegnò diverse persone, a cominciare da Pietro Galesini, uno dei più stretti e colti collaboratori del Borromeo, al quale l'arcivescovo affidò la cura dei vari passaggi di correzione e riscrittura dell'opera sin dal febbraio del 1572. Di questa decisione il Valier veniva informato prontamente dallo stesso Borromeo che, scrivendo all'amico per avvisarlo della ricezione del manoscritto e per ringraziarlo di questa nuova fatica realizzata su sua istanza, affermava:

Rispondo a le tre lettere di V.S. Rev. ringraziandola della Rethorica Christiana che mi ha mandata havendola già fatta vedere al Galesino mentre io mi truovo occupato in alcune diligenze circa il mio clero. Lascero ch'egli le ne scriva qualche cosa bastando a me per

1985, pp. 15-18), curata da Carlo Marcora.

¹² Lettera, Agostino Valier a Carlo Borromeo, Verona 1° ottobre 1571; Biblioteca Ambrosiana di Milano (d'ora in avanti cit.: BAM), F. 86 inf., n. 97, cc. 187r, 190v; edita in L. Tacchella, *San Carlo Borromeo e il card. Agostino Valier (carteggio)*, Verona, Istituto per gli studi storici veronesi, 1972 (d'ora in avanti cit.: Tacchella 1972), pp. 100-101. La parte più consistente del carteggio intercorso tra Carlo Borromeo e Agostino Valier è conservata presso la Biblioteca Ambrosiana di Milano e, dall'incrocio dei dati che emergono dal *Catalogo delle lettere di S. Carlo* (Vol. XII, Verona – vescovo di, pp. 1-7) di Ettore Fustella, dal *Catalogo delle lettere a S. Carlo* (Vol. XVI, Valerio mons. Agostino) sempre di Fustella, con quelli risultanti dallo spoglio della banca dati online dell'*Epistolario di S. Carlo* <<http://ambrosiana.comperio.it/epistolario-di-san-carlo>>, risulta composto di oltre 300 lettere. Nell'opera di Tacchella sono state pubblicate circa 1/3 delle lettere di questo carteggio, le quali tuttavia, in diversi casi, presentano degli errori soprattutto nella datazione e nelle signature indicate. Del carteggio Valier-Borromeo chi scrive ha condotto un lavoro di schedatura sistematico, basato sulla consultazione diretta dei documenti in Ambrosiana o, laddove disponibili, della versione digitalizzata pubblicata nell'*Epistolario di S. Carlo* online. Tale lavoro ha permesso, da un lato, di individuare diverse lettere inedite (alcune delle quali sono richiamate nel presente articolo) e, dall'altro, di correggere tutti gli elementi di discordanza con l'originale che si sono individuati nelle lettere pubblicate da Tacchella. Per le citazioni tratte dalle lettere, così come per quelle estrapolate da altri documenti si è scelto di rispettare il testo originario, optando per pochi interventi utili ad agevolare la comprensione dei testi, per cui sono state sciolte sistematicamente le abbreviazioni, è stato uniformato l'uso della punteggiatura ed è stato regolarizzato l'uso delle maiuscole e delle minuscole.

¹³ Lettera, Agostino Valier a Carlo Borromeo, Verona 3 febbraio 1572 (BAM, F. 85 inf., n. 33, cc. 61r, 68v; edita in Tacchella 1972, p. 101).

adesso dirle che non dubito che sarà opera molto utile non solo al mio Seminario Milanese ma a tutto l'ordine ecclesiastico [...]»¹⁴.

Nella lettera, pur auspicando un utilizzo diffuso dell'opera da parte del clero, sono individuati come destinatari specifici i chierici del Seminario di Milano; si tratta di un elemento non secondario sul quale i due prelati torneranno a confrontarsi nella fase di rielaborazione del trattato. Comunque, va detto che, ad un mese appena di distanza da questa epistola, il Borromeo scriveva nuovamente al Valier, per comunicargli le sue impressioni personali sull'opera:

intanto faccio sapere a V.S. che l'opera sua piace assai in quel stato che ella me l'ha mandata: onde che migliorandola anche come lei mi scrive che fa tanto più sarà utile et fruttuosa et da me maggiormente desiderata, con haverne quell'obbligo che devo all'amorevolezza sua¹⁵.

È evidente che il committente non era pienamente soddisfatto del lavoro e che lo riteneva bisognoso di sostanziali aggiustamenti. Al Valier non rimaneva che rimettere mano all'opera e, grazie alla sua consueta solerzia, già nell'aprile del 1572 era in grado di inviare al Borromeo, per tramite dell'inquisitore di Verona Marco Medici, una versione migliorata del *De rhetorica*. Questa operazione di rielaborazione del testo dovette costare non poca fatica al Valier, visto quanto dice nella lettera di accompagnamento del manoscritto con la nuova stesura:

Io ho aggiunto in molti luoghi à la Rethorica, et l'ho fatta copiare divisa in Capi. Crederò, ch'in questa forma debba dispiacere molto meno, che l'altra copia, nella quale erano degli errori, perché fu male scritta, onde giudicarei che fosse bene che quella prima non si vedesse. Se le continue occupationi non mi levassero il tempo, potrei sperare con qualche studio migliorarla ancora assai¹⁶.

Anche in questa forma arricchita, riorganizzata e corretta l'opera non risultava del tutto rispondente al disegno del Borromeo¹⁷. Rimanevano ancora in sospeso diverse questioni, che – tra l'altro – non erano affatto banali, in quanto attenevano ai destinatari, allo stile e alla struttura argomentativa dell'opera. Di queste il padre Francesco Adorno, su indicazione dell'arcivescovo di Milano,

¹⁴ Minuta, Carlo Borromeo ad Agostino Valier, [Milano] 27 febbraio 1572 (BAM, P. 7 inf., n. 171, c. 149r; edita in Tacchella 1972, p. 61).

¹⁵ Minuta, Carlo Borromeo ad Agostino Valier, [Milano] 26 marzo 1572 (BAM, P. 7 inf., n. 244, c. 225v; edita in Tacchella 1972, p. 62).

¹⁶ Lettera, Agostino Valier a Carlo Borromeo, Verona 17 aprile 1572 (BAM, F. 124 inf., n. 141, cc. 276r, 289v; edita in Tacchella 1972, p. 102).

¹⁷ Il Borromeo informava il Valier di aver ricevuto la copia della nuova versione della *Retorica* con una breve lettera, databile intorno alla fine di aprile del 1572, nella quale ringraziava il vescovo di Verona «della nuova fatica [...] presa in questa opera» e ribadiva le aspettative nutrite per questo lavoro («spero che porterà grandissimo frutto così a questo mio clero, come all'Universale»), senza entrare nel merito della trattazione dei contenuti, compito che, com'è noto, affidò al padre Francesco Adorno. Minuta, Carlo Borromeo ad Agostino Valier, [Milano aprile 1572] (BAM, F. 124 inf., n. 142, c. 277r).

forniva un elenco puntuale al Valier in una densa lettera datata 4 maggio 1572. A tale proposito Oliver Logan ha fatto notare che «it is evident from Valier's correspondence with Adorno, who conveyed Carlo Borromeo's criticisms of a draft initially submitted to him, that he himself had in the first instance intended a simpler work which was subsequently made more elaborate and cultivated in character (partly by hands of others) in response to Borromeo's demands»¹⁸.

In merito ai destinatari il Borromeo chiedeva un cambiamento di prospettiva molto impegnativo, in quanto – come riferiva il padre Adorno – in lui era maturata l'idea di una «Rettorica non ristretta ad introduzione de' giovani, ma assoluta e perfetta per tutti quelli che nella Chiesa di Dio averanno desiderio di predicare con ordine e frutto». Da questa richiesta, che mutava profondamente le finalità originarie dell'opera, derivavano a cascata tutte le altre indicazioni di perfezionamento. Il padre Adorno, pertanto, faceva presente la necessità di adottare uno stile «un poco più culto, e castigato», di inserire «esempi cavati dai Profeti, e da s. Paolo», e di illustrare «in qualche parte l'uso antichissimo nella Chiesa di applicar le figure del testamento vecchio alle cose del testamento nuovo»; suggeriva, inoltre, al Valier di parlare più ampiamente «del modo di esplicar l'Evangelo, le scritture al popolo», di spiegare «alcune figure delle locuzioni oratorie» convenienti all'«oratore cristiano»; e, infine, consigliava di espungere dal testo tutte «quelle clausole piene di modestia e di umiltà», ritenute poco confacenti all'alta dignità dell'autore¹⁹.

In sostanza, ciò che veniva chiesto al Valier era una profonda ristrutturazione dell'opera. Il vescovo di Verona, tuttavia, non si mostrò affatto disposto a rivedere in modo così radicale il suo scritto, al punto che nella risposta che inviava a distanza di pochi giorni al padre Adorno, confutava senza particolare remore molte delle osservazioni avanzate. Egli, infatti, se pure concedeva di adottare uno stile «più culto e castigato» per il proemio e non poneva alcun veto a che Pietro Galesini intervenisse sulla veste linguistica di tutta l'opera, era del parere che il registro comunicativo dovesse comunque rimanere piano e facilmente accessibile ai più. A questo riguardo precisava che, sebbene fosse consapevole di aver perduto quella familiarità con la prosa ciceroniana che aveva in gioventù, in fondo non la riteneva affatto «conveniente alla persona di un vescovo, ed alla trattation delle cose ecclesiastiche» e, nel giustificare le scelte stilistiche compiute, affermava: «giudicai che fosse bene, delineando, aver l'occhio all'ordine delle cose, ed usar certe parole usitate, fuggendo la barbarie, dimostrando desiderio che siano intesi li precetti essendo esplicate facilmente,

¹⁸ O. Logan, *Agostino Valier (1531-1606) bishop of Verona and cardinal*, in Id., *The Venetian upper clergy in the 16th and 17th centuries: a study in religious culture*, Lewiston, The Edwin Mellen press, 1996, pp. 233-234.

¹⁹ Lettera, Francesco Adorno ad Agostino Valier, Milano 4 maggio 1572; edita in *Lettera del padre Francesco Adorno della Compagnia di Gesù a Monsignore Agostino Valiero vescovo di Verona in esame del libro del Valerio De Rhetorica ecclesiastica e risposta del Valiero all'Adorno ora per la prima volta pubblicate*, In Venezia, presso Giuseppe Picotti tipografo, 1829, pp. 11-13.

non che sia ammirata la lingua»²⁰. In questo modo il vescovo di Verona, non solo si proponeva di spazzare via le riserve espresse sullo stile del suo scritto, ma intendeva anche illustrare la sua personale idea di retorica ecclesiastica, perché era su di essa che – di fatto – si fondava l'intero impianto formale e sostanziale dell'opera.

Se, per un verso, sulla necessità di arricchire il testo con esempi tratti dai profeti e da S. Paolo, il Valier concordava pienamente e confidava di riuscire a soddisfarla anche grazie all'aiuto del fidato padre gesuita Girolamo Otello e dei collaboratori del Borromeo; per un altro, non appariva intenzionato ad assecondare del tutto le altre richieste di perfezionamento avanzate dall'arcivescovo, o meglio, lasciava intendere che le avrebbe accolte con una certa moderazione, per non stravolgere e complicare inutilmente quella struttura semplice e lineare, che – a suo parere – costituiva il vero punto di forza dell'opera e che, fatta eccezione per i doverosi aggiustamenti e le correzioni più stringenti, voleva preservare ad ogni costo.

Il terzo ricordo, ch'è di trattar del modo di esplicar l'evangelio, e le scritte al popolo – precisava a questo riguardo il vescovo di Verona –, sopra che, sebben nel terzo libro io aveva dato precetti universali, spero di dilatarli in modo che V.R. resterà soddisfatta in parte; ma non cessi di far notar quelli, che giudicherebbe che fossero a proposito. Quando incominciai a scriver dubitai pian piano di non far del Teologo, e di non far una mezza somma, onde fosse giudicata la mia fatica superflua, e perciò lasciai questa parte delli sensi con li quali s'interpretano le scritte perché è stata trattata da molti. Ma spero di parlarne facilmente, ed inserir questa trattazione nell'opera, in modo che starò nelli termini; e similmente non sarà difficile parlar dell'uso che s'ha sempre tenuto nella Chiesa di applicar le figure del testamento vecchio al nuovo, e mi sforzerò di dar precetti più universali, più certi, e più facili che mi sia possibile. Quanto a quella parte onde desidera ch'io tratti delle figure oratorie, se ne potrà certo aggiungere alcune, ma non si potrà far menzione di tutte, scrivendo noi latino a persone che parlano volgare, ed appartenendo veramente la trattazione delle figure molto più al grammatico, ed all'orator del secolo; che all'orator cristiano²¹.

Delineate le modalità con le quali intendeva affrontare gli aspetti che potremmo definire 'secondari' sui quali il Borromeo gli aveva chiesto di intervenire, il Valier riservava la seconda parte della sua lettera alla trattazione delle questioni più rilevanti e anche più delicate da affrontare, ovvero quelle inerenti l'autore e i destinatari dell'opera. In merito al primo aspetto, il vescovo di Verona dichiarava di non essere intenzionato ad eliminare quelle «clausole piene di modestia ed umiltà» relative all'autore con le quali aveva infarcito l'opera e dava ampie ragioni di questa sua posizione:

²⁰ Lettera, Agostino Valier a Francesco Adorno, [maggio 1572]; edita in *Ibid.*, pp. 14-18. La datazione della lettera si ricava da un breve inciso presente nell'ultima parte del documento, nel quale si legge: «ora ch'è fatto il Pontefice». Si fa riferimento, evidentemente, all'elezione di Gregorio XIII, che fu elevato al soglio pontificio il 13 maggio 1572; tale data può essere individuata come termine *ad quem* della lettera del Valier.

²¹ *Ibid.*, pp. 15-16.

Prima – faceva notare il Valier al padre Adorno – per rispetto della mia persona, perciocché sebben sia Vescovo, la verità sta così, che io mi trovo in questo uffizio per pura grazia di Dio, e senza alcun mio merito, ed io ben conosco che non son uomo da insegnar il modo di predicar a tutti, non avendo quella dottrina che sarebbe necessaria, e non essendo esercitato in quest'arte nobilissima quanto bisognerebbe per avere quell'autorità che ella ricerca. Onde, Padre, s'io volessi fare il maestro così assolutamente, potrebbono ragionevolmente questi Padri religiosi, che han studiato tanto lungamente nelli suoi Monasteri, e che sono stati uditi tanto volentieri in diverse città, dire queste parole: *Unde nobis repente exortus est orator qui nobis dicendi praecepta praescribat?*²²

Quella del Valier era qualcosa di più di una semplice dichiarazione di modestia, egli voleva preservare la natura eminentemente didattica e popolare dell'opera ed evitare che fosse trasformata in un trattato per pochi eruditi. In questo senso, la questione dell'autore appariva strettamente legata a quella dei destinatari, che – in fondo – costituivano il principale oggetto d'interesse del Valier, come rivelava chiaramente al padre Adorno nelle battute finali della sua lettera:

Insegnar è grande impresa, e massimamente insegnar arte: insegnar poi un'arte, ch'è sopra le arti, di accrescer colla parola il regno di Dio, è impresa maggiore di quello che io posso portare: e se V.R. considererà bene, troverà ch'io dico il vero, perciocché, sebben, com'ella mi disse, scrissi *De recta philosophandi ratione*, scrissi *ad Venetos Adolescentes*, perché conosceva di non aver trattato quell'argomento a sufficienza [...]; onde per medesima ragione, come io credo, è molto meglio restringere questa operetta all'uso de' Cherici, e di qualche sacerdote di non molte lettere, che usar quell'autorità ch'ella desidera.

Il passo appena richiamato è di particolare rilievo, non solo perché rappresenta una testimonianza esplicita della spiccata sensibilità pedagogica e pastorale del Valier, ma anche perché prova il ruolo preponderante e, se vogliamo, decisivo che egli si ricavò nella definizione dei contenuti, della forma e delle finalità del *De Rhetorica ecclesiastica*, che il suo committente, come aveva fatto sapere per tramite del padre Adorno, avrebbe voluto più dotta e accomodata per un pubblico più attrezzato.

Va detto, tuttavia, che il Borromeo non rinunciò del tutto al suo progetto di 'nobilitazione' dell'opera, che, come si è già accennato, fu sottoposta a un lungo processo di revisione, al quale presero parte, oltre a Pietro Galesini e al padre Francesco Adorno, due insigni teologi del tempo, cioè il gesuita Manuel de Sá e il vescovo di Cittanova Girolamo Vielmi²³. La revisione del *De Rhetorica ecclesiastica* si protrasse per tutto il 1572 e impegnò anche tutto

²² *Ibid.*, p. 17.

²³ Del Vielmi è interessante ricordare che, dopo aver tenuto la cattedra di metafisica (1551-1552) e di teologia (1554-1562) presso lo *Studium* di Padova, nel 1562 si trasferiva a Roma, dove tenne per un breve periodo «nel Romano Liceo pubblica scuola, in cui contò, fra gli altri discepoli, Agostino Valier, Marcantonio Marsilio Colonna, e S. Carlo Borromeo». Giambattista Contarini, *Notizie storiche circa li pubblici professori nello studio di Padova scelti dall'ordine di san Domenico*, [...], In Venezia, presso Antonio Zatta, 1769, pp. 55-56.

l'anno seguente. Dalla corrispondenza intercorsa tra il Valier e il Borromeo, apprendiamo che nell'estate del 1572 il vescovo di Verona stava «aspettando le annotazioni delli padri [della Compagnia di Gesù] et del Sr. Galesino»²⁴ e che il 7 dicembre di quell'anno scriveva al Borromeo comunicando di aver adottato una soluzione alternativa per velocizzare i tempi di riesame dell'opera: «Poiché ms Pietro Galesino non è venuto in tempo, havuto l'ordine, ho pensato che sia bene scriver quelli concetti che io pensavo di conferir seco et così ho messo insieme alcune censure et le mando per indurlo a rispondermi»²⁵. Possiamo immaginare che le osservazioni del Galesino giunsero al Valier in tempi molto rapidi, se all'inizio dell'anno seguente, più precisamente il 6 gennaio 1573, egli era in grado di inviare al Borromeo il manoscritto con la nuova versione della *Rhetorica*. Nella lettera di accompagnamento del testo il Valier illustrava i passaggi più significati del lavoro compiuto:

Questa copia – assicurava il vescovo di Verona – è più tollerabile delle altre perché li capi sono meglio distinti et le autorità meglio accomodate. Oltre che ho aggiunto alcune cose nel primo libro accomodando tutti li loci communi all'essortatione di udir Messa frequentemente al populo, nel secondo pare, che habbi assai ben ridotto la trattazione delli autori della quale lei mi diede molto lume, quando la vidi. Nel terzo ho aggiunto un poco di pratica delle figure delle sententie al parer mio molto utile et un poco di trattatione delli tipi, cioè delle figure del testamento vecchio²⁶.

L'opera, dunque, era stata irrobustita e migliorata in tutte le sue parti; in questa fase di ristrutturazione il Valier aveva potuto mettere a frutto non solo i consigli dei revisori, ma anche quelli dello stesso Borromeo, che – come emerge chiaramente dalla lettera appena richiamata – non si era limitato a seguire le varie fasi di rielaborazione dell'opera, ma era entrato anche nel merito dei contenuti, fornendo all'autore suggerimenti e indicazioni precise. A questo punto si era giunti a un livello molto avanzato del processo di revisione dell'opera, ma non ancora definitivo, l'ultima fase di rilettura e correzione del *De Rhetorica ecclesiastica*, infatti, come si è anticipato, sarebbe continuata per tutto il 1573.

Nella corrispondenza con il Valier, il Borromeo manifestava ormai una certa impazienza e premura nel pubblicare l'opera; tuttavia, era consapevole del fatto che era necessario raccogliere altri pareri sulla versione appena definita e affrontare, poi, un ultimo processo di limatura. Egli, inoltre, riteneva quanto mai opportuno anche «farla leggere nel Seminario, et praticarla» prima di darla

²⁴ Lettera, Agostino Valier a Carlo Borromeo, Verona 8 luglio 1572 (BAM, F. 85 inf., n. 38, cc. 74r-74v, 79v; edita in Tacchella 1972, p. 102).

²⁵ Lettera, Agostino Valier a Carlo Borromeo, Verona 7 dicembre 1572 (BAM, F. 85 inf., n. 41, cc. 81r, 86v).

²⁶ Lettera, Agostino Valier a Carlo Borromeo, Verona 6 gennaio 1573 (BAM, F. 85 inf., n. 56, cc. 107r-107v, 112v; edita in Tacchella 1972, p. 106).

alle stampe²⁷. Quest'ultimo proposito, che mostrava un'attenzione specifica per le esigenze dei destinatari principali dell'opera, fu accolto con particolare favore dal Valier, il quale con la lettera del 2 marzo 1573 comunicava al Borromeo di aver avviato un'esperienza simile nei due seminari veronesi, vale a dire il Seminario diocesano, da lui recentemente fondato, e l'antica Scuola degli accoliti:

Hoggi col nome di Dio s'è dato principio a legger la Rhetorica Ecclesiastica et io ho fatto la prima lettione dissegnando farne due altre et forse le farò scriver et le farò mandare al rettore del Seminario suo perché vegga come crederei che fosse bene metter in pratica quella operetta et come ho dissegnato che sia interpretata di qua, nel che ho havuto gran gratia dal S.r Dio che ho visitato un homo da bene et l'ho pregato in casa che la leggerà, spero con frutto al Seminario, a una parte delli Acholiti et ad alcuni sacerdoti ancora²⁸.

A questa fase di 'sperimentazione diretta' dell'opera sia l'autore che il committente diedero grande rilievo, tant'è che, come si dirà meglio più avanti, non solo le tre lezioni sulla *Retorica* a cui fa cenno il Valier nel brano appena richiamato, diventeranno poi parte integrante delle varie edizioni dell'opera, ma si può pensare che gli stessi risultati ottenuti dall'adozione del testo a Verona e a Milano furono presi in considerazione nell'ultima fase di limatura del testo, come lascia presupporre l'interesse con il quale il vescovo di Verona nella lettera del 15 luglio 1573 chiedeva al Borromeo notizie proprio sulla «lettura [...] fatta nel Seminario» di Milano, indicandola come un ottimo banco di prova per testare l'«utilità» effettiva della «fatica» compiuta. Da rilevare che, con la stessa missiva, il Valier trasmetteva all'arcivescovo di Milano «le annotazioni sopra la Rethorica di Mons. di Cittanova»²⁹, alle quali presto sarebbero seguite anche le osservazioni degli altri 'revisori' coinvolti nella rilettura finale dell'opera. All'inizio di ottobre di quell'anno, infatti, l'arcivescovo di Milano poteva inviare al Valier le ultime osservazioni sull'opera di Pietro Galesini e quelle di «altri Padri» della Compagnia di Gesù³⁰, mentre il vescovo di Verona poteva comunicare gli esiti principali dell'incontro avuto con padre Manuel de Sá:

²⁷ Lettera, Carlo Borromeo ad Agostino Valier, Milano 20 gennaio 1573; edita in Agostino Valier, *Degli occulti benefici di Dio. Libri tre di Agostino Valerio cardinale e vescovo di Verona. Volgarezzati da Niccolò Antonio Giustiniani dell'ord. di S. Benedetto della congreg. Cassinese vescovo pur di Verona. Con l'aggiunta di molte lettere inedite del cardinale arciv. di Milano S. Carlo Borromeo*, In Verona, per l'erede di Agostino Carattoni stampator vescov., 1770, espist. N. 8, p. 134; Tacchella 1972, p. 64.

²⁸ Lettera, Agostino Valier a Carlo Borromeo, Verona 2 marzo 1573 (BAM, F. 85 inf., n. 57, cc. 108r-108v, 111r-111v). Sulle due istituzioni veronesi mi permetto di rinviare a: E. Patrizi, *La formazione del clero veronese dopo Trento: le origini del Seminario diocesano e la riforma della Scuola degli accoliti*, «History of Education & Children's Literature», vol. IX, n. 1, 2014, pp. 399-380.

²⁹ Lettera, Agostino Valier a Carlo Borromeo, Verona 15 luglio 1573 (BAM, F. 85 inf., n. 58, c. 109r-110v; edita in Tacchella 1972, pp. 104-105).

³⁰ Minuta, Carlo Borromeo ad Agostino Valier, Milano 8 ottobre 1573 (BAM, P. 8 inf., c. 220r; edita in Agostino Valier, *Degli occulti benefici di Dio libri tre di Agostino Valerio cardinale*

È passato di qua il p. Emanuel del giudizio del quale son restato mirabilmente soddisfatto et l'ho pregato a metter lui l'ultima mano alla *Rhetorica*, approbando io in ogni parte le censure et quel ricordo principalmente che da di levar la quarta parte dell'opera, consistendo in effetto la gratia di tali opere nella brevità et nella di lucidità dovendosi lassare la parte sua alli interpreti³¹.

Il 6 novembre 1573, finalmente, il vescovo di Verona poteva annunciare al Borromeo che aveva «fatto copiare ultimamente la *Rhetorica ecclesiastica* levandone alcune parti», conformemente a quanto indicato dal padre Manuel de Sá e da lui medesimo, e che presto l'arcivescovo di Milano avrebbe ricevuto la copia dell'ultima versione direttamente dalle mani dell'inquisitore Marco Medici³². I tempi erano oramai maturi per procedere con la pubblicazione dell'opera e di questo ne era convinto anzitutto il committente, il quale, subito dopo l'incontro con il padre Medici, scriveva risoluto al Valier:

Se ben molti come lei mi scrive sentono che questa opra non si havesse per adesso a dare in luce non dimeno il Padre Inquisitore di Verona [Marco Medici] che mi portò la copia d'essa Rethorica, ultimamente da lei rivista scorrendo a lungo meco sopra di ciò et mostrandomi la diligenza usata anche da lei in rivederla et migliorarla, mi lodò l'opra di maniera, che gli pareva non doversi tardare per darla alla stampa. Sicché intendendo io questo suo giudizio, et vedendo parimenti il desiderio, che egli ne haveva, visto considerando che già ella ha più volte riveduta questa rhetorica et ultimamente col giudizio anche di P. Emanuele et sapendo che chi vuole sothilizare sempre vi sarà che dire in un libro che si vede mutar et rimutar, venni finalmente nell'opinione dell'Inquisitore che fosse hora dar diletto a chi aspetta questa opera et ne può cavar frutto et così decisi di non farla più rivedere al Galesino né ad altri et volentieri condiscesi a quel che lui mi persuase, che si stampasse non in Milano ma in Venetia, acciò uscisse fuora l'opra più presto et di migliori caratteri. Si partì egli da me con questa risoluzione, et così penso per quanto posso congetturare anco dalle lettere di V.S. Rev.ma non facendomi alcuna mentione che quel padre sia ritornato da lei, che egli sia in Venetia, et habbia già fatto dare principio alla stampa³³.

Alcuni imprevisti, intercorsi all'ultimo momento, modificarono questo progetto iniziale e, come spiegava lo stesso padre Medici nella lettera dedicatoria della *princeps* dell'opera, si decise di porvi rimedio facendo uscire la prima impressione a Verona, con l'intento – presto attuato – di mettere mano

e vescovo di Verona volgarizzati da Niccolò Antonio Giustiniani dell'ord. D S. Benedetto della Congreg. Cassinense vescovo di Verona. Con l'aggiunta di molte lettere inedite del Cardinale Arciv. di Milano S. Carlo Borromeo, In Verona, per l'Erede di Agostino Carattoni Stampator Vescov., 1770 (d'ora in avanti cit.: Giustiniani), ep. 13, pp. CXLI-CXLII; Tacchella 1972, p. 70).

³¹ Lettera, Agostino Valier a Carlo Borromeo, Verona 4 ottobre 1573 (BAM, F. 85 inf., n. 61, cc. 119r-119v, 130v).

³² Lettera, Agostino Valier a Carlo Borromeo, Bovolone 6 novembre 1573 (BAM, F. 85 inf., n. 63, cc. 121r, 128v; edita in Tacchella 1972, p. 106).

³³ Minuta, Carlo Borromeo ad Agostino Valier, [novembre/dicembre 1573] (BAM, P. 21 inf., cc. 513r-514r; edita non integralmente in Tacchella 1972, pp. 141-142). È interessante sottolineare come l'autore materiale della lettera, che appare piena di cancellature e ripensamenti, sia Pietro Galesini, come si evince dalla firma apposta al termine del documento.

nel brevissimo termine a un'edizione più curata ed elegante a Venezia³⁴. Nel frattempo il Borromeo si era attivato per dare alle stampe anche un'edizione milanese, sulla quale poteva dare ragguagli al Valier già nella lettera del 30 dicembre 1573, riferendo: «di quà si dà principio a ristampare i fogli che ha mandato il Padre Inquisitore, et così s'andarà seguitando di mano in mano»³⁵. Di fatto per la pubblicazione del *De Rhetorica ecclesiastica* furono coinvolte sin da subito tre sedi, che lavorarono praticamente in parallelo. Così all'inizio del 1574 il trattato valeriano uscì prima a Verona per i tipi di Sebastiano e Giovanni Dalle Donne, poi a Milano presso lo stampatore arcivescovile Pacifico Ponzio o da Ponte³⁶ e, infine, a Venezia per tramite della società tipografica di Andrea Bocchino e fratelli³⁷.

Il 14 aprile di quell'anno, finalmente, il Borromeo poteva informare il Valier del fatto che erano «anche in ordine sino a cento delle sue Rethoriche stampate in Milano»³⁸. Per raggiungere questo risultato si era lavorato alacremente sino all'ultimo, infatti appena quattro mesi prima, più precisamente il 13 gennaio, l'arcivescovo di Milano scriveva al Valier, dicendo:

Delle Sinopsis ho visto quel che V.S. mi scrive, et aspetterò d'haverla al suo tempo. Qui s'è dato principio a ristampar la Rhetorica et si va appresso al resto con diligenza; però – aggiungeva l'arcivescovo con una certa premura – s'aspettaranno di volta in volta i fogli

³⁴ Il p. inquisitore, infatti, nella lettera dedicatoria della *princeps* veronese, indirizzata al Borromeo e poi inserita anche nell'edizione veneziana, spiegava le ragioni che avevano determinato questo cambiamento nel piano di pubblicazione dell'opera: «Eram sane multis occupationibus impeditus, ut sine magno incommodo; praesertim nivis abundantia interclusis itineribus, Venetias versus iter suscipere non possem: cogitabam quingenta amplius exemplaria in hac diocesi esse necessaria: sciebam etiam Episcopum huius operis auctorem scribendi laborem sumpsisse, ut inprimis clericis Mediolanensis seminarij, atque etiam clericis suis consuleret: quod si consequetur [...] satis magnum sui laboris fructum se percepisse existimabit. Cum autem cogitarem qua ratione fieri posset, ut quantocius [...] utilitati clericorum consuleretur; hanc inveni rationem, ut quamprimum opus Veronae ederetur [...]. Editur igitur liber Ecclesiasticae Rhetoricae Veronae; et quamvis potuisset Venetiis multo elegantioribus typis imprimi». Carlo Ampliss. Card. Borromeo archiepiscopo Mediolani Fr. Marcus Medices Ord. Praed. *Inquisitor Veronae*, in Agostino Valier, *De Rhetorica ecclesiastica ad Clericos libri tres*, Veronae, apud Sebastianum et Ioannem à Donis, 1574, c. a2v-a3r.

³⁵ Minuta, Carlo Borromeo ad Agostino Valier, Milano 30 dicembre 1573 (BAM, P. 9 inf., c. 695r; edita in Giustiniani, ep. 16, pp. CXLIV-CXLV; Tacchella 1972, p. 71).

³⁶ Agostino Valier, *Libri tres, de rhetorica ecclesiastica. Synopsis eiusdem rhetoricae ab ipso auctore contexta. Adiunctis tribus praelectionibus, ab eodem habitis quibus omnis huius Rhetoricae explicandae ratio traditur. Accessit item index rerum et verborum*, Mediolani, apud Pacificum Pontium, typographum illustriss. et reverendiss. Cardinalis Borromaei archiepiscopi, 1574.

³⁷ Id., *De rhetorica ecclesiastica ad clericos libri tres [...]. Una cum praelectionibus ad suos clericos habitis, alias in lucem editis, accessit et pulcherrima totius Ecclesiasticae Rhetoricae synopsis, non antea in lucem edita. Adiuncto etiam indice locupletissimo*, Venetiis, apud Andream Bochium, et fratres, 1574.

³⁸ Minuta Carlo Borromeo ad Agostino Valier, Milano 14 aprile 1574 (P. 10 inf., c. 241r; edita in Tacchella 1972, p. 73).

stampati, piacendomi quell'aggiunta d'avvertimenti che ha fatti, come si debba leggere et ascoltare la Rhetorica, che saranno utili anche qui, però non lasci di mandarli³⁹.

Dalla lettera emerge chiaramente che, non solo per la stampa dell'opera furono coinvolte quasi contemporaneamente tre sedi, ma l'impresa fu anche portata avanti di pari passo all'ultima fase di revisione di altre due 'fatiche' del Valier correlate alla *Retorica*, vale a dire le *Sinossi* e le *Prelezioni*.

Le *Sinossi* erano state concepite dal Valier come una sorta di strumento di corredo della *Retorica*, al quale era affidato il compito di offrire in poche e compendiose pagine, organizzate in forma di schema, un quadro d'insieme dei contenuti dell'opera, utile non solo per comprenderne la struttura concettuale e argomentativa, ma anche per fissare e ripassare gli argomenti. Va detto che, se pure nella già ricordata lettera del 15 luglio 1573 il Valier accennava alle *Sinossi* dandole come compiute⁴⁰, si arrivava alla forma definitiva del testo solo all'inizio del 1574, quando il vescovo di Verona scriveva al Borromeo per aggiornarlo sulle decisioni prese in merito all'*editio princeps*, affermando:

Della Sinopsi ho accomodato certe poche cose et ne ho aggiunte alcune, che ho aggiunte in questa ultima revisione della rhetorica, nella quale crederò havera migliorata. La Sinopsi corretta, havendone io già fato dar copia ad alcuni di questi chierici, è stata data da uno di essi ad un librarò, il quale, per quanto ho inteso, penserà di farla stampare fuori di questa città et Dio voglia che non se ne penti. Quanto a me, mi sono risoluto di non farla stampare per adesso, pensando poi rivederla di novo fra quatro o sei mesi; et farla stampare separatamente; essendo del parere di Mons. Vescovo di Città nova; che più tosto si stampi separata, che annessa⁴¹.

Lo stesso parere del vescovo di Cittanova era stato avanzato precedentemente da padre Manuel de Sá che, per tramite del Borromeo, aveva fatto sapere al Valier come ritenesse le *Sinossi* un apparato di supporto «molto utile» per la comprensione dell'opera, ma che ciononostante riteneva più opportuno non includerle nella prima stampa della *Retorica* «per non sminuire l'authorità dell'opra principale»⁴². A Verona, come da programma, le *Sinossi* furono pubblicate in un'edizione separata, stampata l'anno successivo sempre presso i tipografi Sebastiano e Giovanni Dalle Donne⁴³; mentre a Milano e Venezia

³⁹ Minuta, Carlo Borromeo ad Agostino Valier, Milano 13 gennaio 1574 (BAM, P. 10 inf., c. 31r; edita in Giustiniani, ep. 17, pp. CXLV-CXLVI; Tacchella 1972, p. 72).

⁴⁰ Lettera, Agostino Valier a Carlo Borromeo, Verona 15 luglio 1573 (BAM, F. 85 inf., n. 58, cc. 109r-110v; edita in Tacchella 1972, pp. 104-105).

⁴¹ Lettera, Agostino Valier a Carlo Borromeo, Verona 5 gennaio 1574 (BAM, F. 90 inf., n. 62, cc. 123r-123v, 130v).

⁴² Minuta, Carlo Borromeo ad Agostino Valier, [novembre/dicembre 1573] (BAM, P. 21 inf., cc. 513r-514r).

⁴³ Agostino Valier, *Rhetoricae ecclesiasticae ab Augustino Valerio, Veronae episcopo, scriptae synopsis, ab ipso contexta*, Veronae, apud Sebastianum, et Ioannem a Donnis, typographos episcopales, 1575. Anche la seconda edizione veronese della *Retorica ecclesiastica* (Veronae, apud Sebastianum, et Ioannem a Donis, 1574) fu pubblicata senza le *Sinossi*, e sebbene a questo

uscirono nell'edizione della *Retorica* del 1574, insieme ad un altro strumento di affiancamento e di introduzione all'opera, contenuto quest'ultimo anche nella *princeps* veronese, vale a dire le *Prelezioni*.

Quegli «avvertimenti» dei quali il Borromeo chiedeva conto al Valier nella lettera del 13 gennaio 1574, altro non erano che le tre *Prelezioni* sulla *Retorica* alle quali il vescovo di Verona aveva messo mano già da tempo e che erano state elaborate per illustrare ai chierici i caratteri essenziali dell'opera, le sue finalità e l'approccio con il quale andava affrontata. Dall'analisi della corrispondenza intercorsa tra il Borromeo e il Valier emerge che il vescovo di Verona aveva predisposto il testo di queste tre «lettioni» sin dal marzo del 1573⁴⁴, facendone fare pubblica lettura presso il Seminario di Verona e presso la Scuola degli Accoliti; un dato, questo, che viene confermato anche dal titolo con il quale le si introduce nell'edizione veneziana della *Retorica: Praelectiones tres ab Augustino Valerio episcopo Veronae, ad Clericos suos habitae: quibus totius artis Rhetoricae Ecclesiasticae prolegomena, breviter, et dilucide, uno anno antequam opus ederetur, sunt explicata*⁴⁵.

Nel giro di pochi anni il *De rhetorica ecclesiastica* ebbe numerose edizioni, ben più delle otto ricordate dal Valier nel *De cautione adhibenda in edendis libris*⁴⁶, arrivando anche a circolare tra lettori francesi e tedeschi⁴⁷. Il

riguardo il Borromeo dichiarava: «nella nuova edititione della Rethorica ecclesiastica mi saria piaciuto che fosse stampata la synopsis» (Minuta, Carlo Borromeo ad Agostino Valier, [Milano] 24 novembre 1574, BAM, P. 11 inf., c. 385r), il Valier faceva presente che era stato costretto ad escludere «la sinopsi per far presto et perché bisognava rivederla et accomodare alcune cose aggiunte di che ho dato ordine in questa editione, il fine è stato supplire al bisogno d'esemplari et [...] di corregger loghi che non s'intendevano bene» (Lettera, Agostino Valier a Carlo Borromeo, Verona 29 novembre 1574, BAM, F. 131 inf., n. 255, cc. 490r, 495v).

⁴⁴ Lettera, Agostino Valier a Carlo Borromeo, Verona 2 marzo 1573 (BAM, F. 85 inf., n. 57, cc. 108r-108v, 111r-111v); Minuta, Carlo Borromeo ad Agostino Valier, [Milano] 11 marzo 1573 (BAM, F. 46 inf., n. 56, c. 97r; edita in Tacchella 1972, pp. 66-67).

⁴⁵ Valier, *De rhetorica ecclesiastica ad clericos libri tres* [...], cit., p. 269.

⁴⁶ Id., *De cautione*, cap. XXXIV, p. 230.

⁴⁷ Nel 1574, oltre alla *princeps* uscita a Verona, all'edizione milanese e veneziana, fu data alle stampe almeno un'altra edizione veronese, sempre per i tipi di Sebastiano e Giovanni Dalle Donne, in un formato più piccolo (in 8° anziché in 4° come la prima edizione) e senza gli elementi di corredo dell'opera, ovvero le *Prelezioni* e le *Sinossi*. L'anno dopo l'opera era pubblicata a Parigi (Parisiis, apud Thomam Brumennium, in Clauso Brunello, sub signo Olivae, 1575) e a Colonia (Coloniae, apud Geruinum Calenium, et Haeredes Quentelios, 1575), dove risulta stampata ancora nel 1582 presso lo stesso editore; nel 1576 e nel 1577 veniva pubblicata a Roma (impensis haeredum Francisci Tramezzini, apud Iosephum de Angelis); a Venezia usciva insieme agli *Ecclesiasticae rhetoricae libri sex* di Luis Granada nel 1578 (Venetiis, apud Franciscum Zilettum, 1578) e autonomamente nel 1584 per la stessa società tipografica che aveva curato la prima edizione veneziana (Venetiis, apud Andream Bochinum et Fratres, 1584). Va ricordato, inoltre, che l'anno prima l'opera veniva data nuovamente alle stampe a Verona insieme a un altro scritto del Valier destinato alla formazione del clero, il *De acolitorum diciplina*, (Veronae, apud Hieronymum et fratres Stringarios, 1583). Cfr. Catalogo collettivo delle biblioteche del Servizio Bibliotecario Nazionale (SBN, <<http://www.sbn.it>>), Censimento nazionale delle edizioni italiane del XVI secolo (Edit 16, <<http://edit16.iccu.sbn.it>>), Red de Bibliotecas Universitarias Española

periodo di massimo successo per l'opera va certamente collocato nei decenni immediatamente successivi alla prima impressione, anche se continuò a godere di una certa attenzione almeno sino al XIX secolo inoltrato⁴⁸, come sembrano confermare anche le note di possesso presenti in alcuni esemplari del *De Rhetorica ecclesiastica* consultati a Verona, dalle quali emergono i nomi di figli illustri del clero veronese del Sette e Ottocento, quali Pietro Leonardi, fondatore della Congregazione Figli di Gesù di Verona, e Luigi Bianchi, prefetto e docente di lettere del Seminario di Verona⁴⁹.

Il successo del *De Rhetorica ecclesiastica* può essere ricondotto a diversi elementi. Non va trascurato, ad esempio, il fatto che l'opera del Valier fu scritta in lingua latina, il che consentì di allargare notevolmente il pubblico dei suoi lettori, proiettandola ben oltre gli angusti confini della penisola italiana. Un altro aspetto che influì in modo positivo sulla circolazione dell'opera va ricondotto principalmente alla linearità e semplicità dei contenuti e dell'impianto generale del testo. «Breve», «delucida», fondata sui precetti di «doi ottimi maestri, Aristotele et Cicerone» e impreziosita da «pochi esempi» mutuati dai Padri della Chiesa, questi erano i principali punti di forza del *De Rhetorica ecclesiastica* che il Borromeo, alla fine del 1573, metteva in risalto subito dopo aver letto

(Rebiun, <<http://rebiun.crue.org>>), Academic and National Library Catalogue (COPAC, <<http://copac.ac.uk/>>), Catalogue Collectif de France (CCFR, <<http://catalogue.bnf.fr/>>); ultimo accesso ai cataloghi elettronici: maggio 2014. Sulla fortuna del *De rhetorica ecclesiastica* del Valier Peter Bayley ha sottolineato come «in France was considered (with Luis de Granada's treatise of the same name) to be the chief representative of this sort of work as late as the eighteenth century». Peter Bayley, *French Pulpit Oratory, 1598-1650. A Study in Themes and Styles, with a Descriptive Catalogue of Printed Texts*, Cambridge, Cambridge University press, 1980, p. 48.

⁴⁸ Per i secoli successivi, abbiamo notizia di un'edizione padovana di fine Seicento (Patavii, ex typographia Iacobi de Cadornis, 1672) e di una veronese di inizio Settecento in due volumi (Veronae, ex Phoeicis typographia, 1732), che riservava il primo volume alla *Retorica ecclesiastica* di Luis Granada e il secondo alla *Retorica ecclesiastica* del Valier, seguita dal *De acolorum disciplina* sempre del Valier, e dal *De modo concionandi liber* di Diego de Estella. Cfr. SBN.

⁴⁹ Le note di possesso sono apposte in due esemplari dell'*editio principes* veronese del 1574. L'esemplare posseduto da Pietro Leonardi è conservato presso la Biblioteca del Seminario di Verona (*collocazione*: Coll. 841), dove è conservata anche un'altra copia della stessa edizione appartenuta a Giuseppe Maria Gilardoni, un altro illustre sacerdote veronese vissuto a cavallo tra Sette e Ottocento (*collocazione*: Coll. 840). L'esemplare appartenuto a Luigi Bianchi si trova, invece, presso la Biblioteca Capitolare di Verona (*collocazione*: AA.I.a.18) e reca nel foglio di guardia posteriore dei versi che registrano l'inevitabile cambiamento dei tempi: «£ Austr[iache] 1:50 / Per prezzo di sì bella opra e sì dotta / Una con mezza lira ho dato fuore / Ma tale e tanto or ignoranza imbotta / la degna prole di quel gran pastore / che ognun che porta cherca, e veste cotta / Por d'un quattrin non le farebe onore. / E chi infatti onorar tal opra, e come? / se omai quivi il Valerio è ignoto nome /1843». Di seguito a questi versi Luigi Bianchi ne scrisse diversi anni dopo (1856), nei quali esaltava l'episcopato di Benedetto Riccabona, vescovo di Verona dal 1854 al 1861, rispetto a quello del suo predecessore, Pietro Aurelio Mutti (1840-1852), che gli aveva comminato la sospensione *a divinis* in quanto rosminiano: «E quel che non fè un Mutti ivi in Verona, / Vel faccia, o meraviglia! Il Riccabona». Sui due vescovi di Verona si veda D. Cervato, *Diocesi di Verona*, Venezia, Giunta regionale del Veneto; Padova, Gregoriana libreria editrice, 1999, pp. 436-442 (Storia religiosa del Veneto; 8).

l'ultima versione di quello che ai suoi occhi appariva ormai come un ottimo «libro de precetti»⁵⁰. Il Valier, in effetti, mantenne fede al progetto iniziale e, nonostante gli importanti cambiamenti apportati alla versione originaria nel corso dei due lunghi anni in cui si dipanò il processo di revisione, il prodotto finale consegnato alle stampe aveva tutte le caratteristiche di un manuale scritto proprio per il clero in formazione che, nei brevi e densi capitoletti in cui si articolavano i tre libri o parti di cui si componeva, presentava un quadro sintetico ma esaustivo di tutto quanto era necessario sapere su temi, tecniche, generi, stili e occasioni dell'oratoria sacra⁵¹.

In merito ai destinatari dell'opera, infatti, il Valier nella terza prelezione precisava:

Dicamus de interprete Ecclesiasticae Rhetoricae, quod non facimus, ut illum, qui interpretaturus est hos libros, doceamus, non eget enim ipse (ut opinor) meis praeceptis, sed quia spero, fore aliquando, ut est vobis futuri sint aliqui, qui hanc eadem ecclesiasticam rhetoricam iis, qui succedent acolythis, in vestra schola, et iis, qui in seminarium admittentur, sint explicari⁵².

Mentre nella prima prelezione, a proposito dello scopo dell'opera, teneva a puntualizzare:

Scopus igitur huius operis (charissimi filii) non est alius, nisi ut philomelae Dei sitis, nihil praeterea, voces Dei sitis, organa divinae bonitatis, et tubae Christi, et quamvis etiam sine his praeceptis in nobilissimo concionandi munere, versari facile possitis, a Spiritu Sancto, qui est verus magister, edocti, et dicendi exercitatione adiuti⁵³.

Il *De Rhetorica ecclesiastica*, dunque, era stato scritto per preparare i giovani chierici al ministero della predicazione, che, in linea con le disposizioni tridentine, era presentato come il principale *munus* di ogni pastore. Su tale funzione il Valier tornava in modo più approfondito nel primo libro dell'opera, laddove forniva una prima definizione di retorica ecclesiastica e descriveva il compito dell'oratore ecclesiastico:

Ars autem, quae Ecclesiasticam eloquentiam Christiano populo tam utilem docet, Rhetorica Ecclesiastica appellatur: quae est ars, sive facultas inveniendi, disponendi, et eloquendi ea, quae ad salutem animarum pertinent. Oratoris autem Ecclesiastici officium est, veritatem,

⁵⁰ Lettera, Carlo Borromeo ad Agostino Valier, [novembre/dicembre 1573] (BAM, P. 21 inf., cc. 513r-514r; edita in Tacchella 1972, pp. 141-142). La minuta della lettera viene scritta e firmata da Pietro Galesini.

⁵¹ Per un'analisi dei contenuti dell'opera: Logan, *The Venetian upper clergy*, cit., pp. 233-239; Bayle, *French Pulpit Oratory*, cit., pp. 47-49; Delcorno, *Dal "sermo modernus" alla retorica "borromea"*, cit., pp. 470-473.

⁵² Valier, *De rhetorica ecclesiastica ad clericos libri tres [...]*, cit., p. 288. Si fa presente che tutte le citazioni richiamate in questa parte dell'articolo sono tratte dalla prima edizione veneziana dell'opera (Venetiis, apud Andream Bochium, et fratres, 1574).

⁵³ *Ibid.*, p. 276.

arcanum Dei aperire populo, docere pie, et innocenter vivere, errores turpissimos pestiferas superstitiones, pravas consuetudines tollere, ad piam, veram, divinamque, sapientiam, Christianam religionem homines compellere, cognitione veritatis (quo nullus est savior cibus) auditorum animos nutrire⁵⁴.

Il linguaggio piano, lo stile scrittoria asciutto, ma mai sciatto, l'esposizione lineare dei contenuti del brano appena richiamato, rappresentano alcune delle cifre caratterizzanti dell'opera⁵⁵, che appare congeniata in ogni sua parte per adempiere al fine precipuamente didattico per il quale era stata scritta, vale a dire quello di fornire ai futuri sacerdoti tutte le competenze teoriche e pratiche utili per applicare l'arte della retorica ecclesiastica al compito pastorale della trasmissione della Parola.

Nel primo libro, descritti i tre generi propri dell'oratoria classica, ovvero quello deliberativo, dimostrativo e giudiziale, si esplorava il significato e il nesso tra i principali strumenti della retorica, concetti, *exempla* e *loci*, riservando a quest'ultimi un'attenzione particolare, per concludere con una schematica carrellata delle *auctoritates* proprie della retorica ecclesiastica, illustrate in otto rapidi capitoletti dedicati «ad sacras literas, ad traditiones apostolorum, et apostolicorum hominum, ad ecclesiae, ad sanctae sedis apostolicae auctoritatem, et ad conciliorum, ad auctoritates sanctorum patrum, ad sententias philosophorum, atque etiam ad historias»⁵⁶. Già nel primo libro emerge come il trattato valeriano aderisca a quella svolta, maturata tra Quattro e Cinquecento, sancita dall'*Ecclesiastes* di Erasmo, che aveva determinato il superamento del sermone tematico (*sermo modernus*) di tipo medievale, fondato sulla presentazione di un assunto teologico, favorendo il ritorno al *sermo antiquus* patristico, che assegnava un ruolo preponderante alla Scrittura e che, in luogo delle sottigliezze dialettiche della scolastica, pur mantenendo degli elementi di continuità con la tradizione medievale, proponeva il recupero delle norme oratorie della retorica classica⁵⁷.

Commovere, questo era il concetto chiave attorno al quale il Valier aveva impostato i contenuti del secondo libro del *De Rhetorica ecclesiastica*. Confutate le teorie degli stoici, che – com'è noto – consideravano i sentimenti dei veri

⁵⁴ *Ibid.*, pp. 11-12.

⁵⁵ In merito alle scelte linguistiche del Valier appare interessante quanto ricordato da Samuele Giombi: «le *Instructiones praedicationis verbi Dei* del 1573 (redatte nell'ambito del III Concilio provinciale milanese) raccomandano l'adozione di una lingua 'popolare': ove l'aggettivo va inteso nella stessa accezione che aveva assunto in un altro ecclesiastico vicino all'ambiente borromaico come il vescovo di Verona Agostino Valier, cioè non nel senso di una concessione alla gergalità, bensì come indicatore di una via moderata, lontana tanto da espressioni raffinate e pericolose quanto da frasi gergali e dialettali». S. Giombi, *Livelli di cultura nella trattatistica sulla predicazione del secolo XVI*, in O. Besomi, C. Caruso (edd.), *Cultura d'élite e cultura popolare nell'arco alpino fra Cinque e Seicento*, Basel-Boston-Berlin, Birkhuser Verlag, 1995, p. 256.

⁵⁶ Valier, *De rhetorica ecclesiastica ad clericos libri tres* [...], cit., p. 71.

⁵⁷ Cfr. Delcorno, *Dal «sermo modernus» alla retorica «borromea»*, cit., in part. p. 466; Giombi, *Precettistica e trattatistica sulla retorica sacra*, cit., pp. 603-604.

e propri 'morbi dell'anima', si sottolineava con forza che il fine principale al quale doveva guardare l'oratore ecclesiastico era uno solo e andava individuato, per l'appunto, nella capacità di *commovere* l'uditorio, ovvero di muovere le corde dell'animo degli astanti, suscitando in essi sentimenti profondi, capaci di veicolare quell'amore verso Dio e verso la vita eterna, riconosciuto come la vera ed unica via di salvezza di ogni uomo. Richiamata la teoria paolina del corpo sociale, il Valier dedicava l'ultima parte di questo libro a spiegare come, per adempiere in modo efficace alla sua missione, il buon oratore cristiano doveva preoccuparsi di adeguare la sua orazione al pubblico di fedeli ai quali rivolgeva la sua predica, considerandone l'età, il genere e l'estrazione sociale. Su questo aspetto veniva posta particolare enfasi, come testimonia il fatto che ai «*varia auditorum genera*»⁵⁸ erano dedicati ben 18 dei 44 capitoli del secondo libro. Mogli, genitori e figli, anziani e giovani, maestri e discepoli, religiosi, sacerdoti e laici, soldati, mercanti, principi e sudditi, nobili e 'ignobili', ricchi e poveri, padri di famiglia, servi e contadini: la casistica presentata era molto ampia e riprendeva, in questo, un aspetto già presente nelle *artes praedicandi* medievali⁵⁹, che il Valier si propose di potenziare ulteriormente, conferendo maggior spessore a quell'idea di retorica ecclesiastica attenta alle specificità dei vari corpi sociali, già prospettata nelle *Instructiones praedicationis verbi Dei* del Borromeo⁶⁰.

Sull'*elocutio*, ovvero sulla forma dell'orazione sacra, si concentrava, invece, il terzo ed ultimo libro del *De Rhetorica ecclesiastica*. In esso, prese in considerazione alcune figure retoriche delle quali si poteva servire il predicatore, anche in ordine al livello di stile scelto (tragico, temperato, elementare), si trattava brevemente dell'*actio* oratoria, con l'analisi di elementi (come l'impostazione della voce, gli atteggiamenti del corpo e la modulazione dei gesti) che attenevano all'interpretazione del discorso, per terminare con indicazioni relative alla disposizione e alle caratteristiche delle varie parti del discorso (*exordium*, *propositio*, *divisio*, *epilogus*). Il quadro appena descritto ha portato Oliver Logan ad esprimere un preciso parere sull'opera valeriana, per cui a suo avviso, «in its ultimate form, however, the *De Rhetorica* reads more like a

⁵⁸ Valier, *De rhetorica ecclesiastica ad clericos libri tres* [...], cit., p. 130.

⁵⁹ Cfr. Giombi, *Livelli di cultura nella trattatistica sulla predicazione*, cit., pp. 271-272.

⁶⁰ Nelle *Instructiones* borromaiche il predicatore è invitato più volte a considerare le esigenze particolari dei vari stati sociali; così, ad esempio, a proposito della *scientia contionatoris*, si ricordava che «*praecepta etiam recte intelliget officiorum, quae magistratuum, quae civium, quae seniorum, quae adolescentum, quae viri, quae uxoris, quae parentum, quae liberorum, quae dominorum, quae servorum, quae denique precipua singulorum: ut, si quando usu venerit, de illis ex praescripto divinarum litteratum, sanctorumque patrum quam optime concionetur*» (c. 214r); mentre nel paragrafo *De virtutum officijs bonisque operibus exponendis*, prima di entrare nel merito della trattazione dei compiti proprio di ogni condizione di vita, si rammentava al predicatore che «*illud omnino praecipuum munus suum esse putabit, uniuscuiusque status homines docere, atque instruere, beati Pauli exemplo, qui excellens, omnibusque numeris absolutus universarum gentium concionator, omnes ad officij sui functiones erudit*» (c. 220r).

treatise addressed to a budding clerical elite, designed to prepare them not only for preaching of a routine pastoral character but also for big-occasion pulpit-oratory»⁶¹. In realtà, ci sembra di poter sostenere che, al contrario, la varietà degli strumenti retorici proposti nel terzo libro vada ricondotta proprio alle finalità educative dell'opera, che nelle intenzioni dell'autore doveva preparare i futuri sacerdoti ad affrontare le varie occasioni e i diversi contesti nei quali si sarebbero potuti trovare ad esercitare il ministero della parola.

In merito alla questione dell'interpretazione della Sacra Scrittura, la versione finale del *De Rhetorica Ecclesiastica* sembrava adeguarsi alle richieste del Borromeo, anche se lo spazio riservato a questo argomento risultava molto limitato (tre capitoletti) e, come ha osservato ancora una volta Logan a questo riguardo, il vescovo di Verona «did advise against an absolutely literal interpretation of Scripture which would be lifeless but urged that preachers avoid the other extreme of excessive resort to allegorical interpretation and of putting about their own ideas»⁶². Su questo aspetto le prescrizioni erano perentorie, veniva raccomandato un uso moderato dell'interpretazione allegorica, si condannava qualsiasi forma di predizione e si esortava, in generale, ad un uso misurato della Sacra Scrittura, che si consigliava di avvicinare con un approccio di tipo letterale-storico, in quanto ritenuto più adatto ad illustrare questioni vicine a quegli aspetti concreti della vita cristiana, che dovevano necessariamente rappresentare il focus principale di ogni espressione della retorica ecclesiastica.

Tanti e vari erano i modelli che il Valier proponeva ai giovani chierici come esempi da studiare e da imitare. Non erano rinnegate, naturalmente, le fonti dell'oratoria classica greca e latina, quali Isocrate, Demostene, Eschine, Platone, Crasso, Cesare, Ortensio, Catone e Cicerone; tuttavia, i chierici erano invitati a seguire soprattutto gli esempi dei padri della Chiesa, nei quali – come aveva efficacemente dimostrato Pietro Galesini nella sua dotta premessa all'edizione milanese dell'opera⁶³ – andavano rintracciate le 'vere' fonti dell'eloquenza cristiana. Tra i padri greci il Valier esaltava in particolare Gregorio Nazianzeno, il Demostene cristiano, accanto al quale poneva Gregorio Nisseno, Giovanni Crisostomo e Basilio il grande; tra i padri latini raccomandava gli scritti di Lattanzio, Tertulliano, Cipriano, Leone Magno, Gregorio Magno, Girolamo e anche Agostino, al quale – però – consigliava di guardare con una certa cautela,

⁶¹ Logan, *The Venetian upper clergy*, cit., p. 235.

⁶² *Ibid.*, p. 237.

⁶³ A questo riguardo, il Galesini si era espresso con queste parole: «Inventionis autem, quae ad christiani oratoris usum pertinet, materiam, iam inde primum ab initio fere nascentis et adultae ecclesiae, uberrime explicatam esse perspiciebas per divinos illos religionis nostrae interpretes, non graecos solum, Iustinum martyrem, Basilium, Nazianzenum Gregorium, Crysostomum, aliosque veteri graecia dignos, sed per latinis etiam in primis, Cyprianum martyrem, Hieronymum, Gregorium pontificem, Ambrosium, Leonem magnum, in iisque ipsum Augustinum: qui quattuor complexus libris eius rei tractationem, ex qua promuntur rationes, et argumenta ad constituendas sacras conciones, informandae ecclesiasticae rhetoricae viam ceteris deinceps commonstravit ac patefecit». Valier, *Libri tres, de rhetorica ecclesiastica*, cit., [c. 4v].

tenendo sempre presente per ogni situazione dubbia o difficile da interpretare la lezione di Tommaso d'Aquino. A questo riguardo, a riprova del fatto che il Dottore Angelico rimaneva – se pur all'interno di una nuova cornice, ovvero quella della seconda scolastica – il punto di riferimento teologico anche per il mondo post-tridentino⁶⁴, il Valier suggeriva una ricetta semplice da applicare: «sed hi et multi alij sanctorum hominum libri, hac adhibita cautione legendi sunt ut quae ex illis collecta fuerint non proferantur, nisi quaestionibus aliquorum, qui in doctrina scholastica sint versati, ex quibus S. Thomam Aquinatem, sanctae Ecclesiae filium dilectum, et charissimum discipulum, deinde et doctorem deligendum putaverim, examinata fuerint»⁶⁵.

Il trattato del Valier rappresentava uno dei più eccellenti risultati prodotti da quel «laboratorio di retorica milanese» promosso da Carlo Borromeo, nell'ambito del quale possono essere ricondotti anche il *De praedicatorum Verbi Dei* di Giovanni Botero (1585), il *Modo di comporre una predica* (1584) e *Il Predicatore* (1609) di Francesco Panigarola⁶⁶. A queste opere scritte da membri della cosiddetta cerchia borromaica, possono essere accostati due dei numerosi trattati di retorica ecclesiastica prodotti in Spagna e molto apprezzati dal Borromeo: gli *Ecclesiasticae rhetoricae sive de concionando libri sex* del domenicano Luis de Granada e il *Modus concionandi* del francescano Diego Estella. Molto affini alla *Retorica* del Valier per influenza, circolazione e caratteristiche interne, i due trattati uscirono per la prima volta nel 1576, vale a dire appena due anni dopo la pubblicazione del trattato del vescovo di Verona, rispettivamente a Lisbona e a Salamanca, e furono stampati a Venezia quando il card. Borromeo era ancora in vita.

Le opere di Valier, Granada ed Estella segnarono una nuova stagione nella storia dell'oratoria sacra, in quanto andarono a colmare un vuoto, fissando i canoni che avrebbero contrassegnato la predicazione della Chiesa cattolica non solo di quella di fine secolo ma anche del secolo successivo⁶⁷. Il ruolo che ebbe il Borromeo nel fare di questi testi i punti di riferimento della retorica ecclesiastica post-tridentina fu fondamentale. Non solo egli, infatti, come si è

⁶⁴ Per un approfondimento sulla nascita e sviluppo della seconda scolastica e sugli approcci con i quali affrontò le principali tematiche teologiche lasciate aperte dal Tridentino (rapporto tra Scrittura e tradizione, e tra Grazia di Dio e libero arbitrio, concezione della Chiesa e della natura di Cristo): F. Buzzi, *La «scolastica barocca» come risposta alla riforma e ai tempi nuovi*, in M. Sangalli (ed.), *Per il Cinquecento religioso italiano: clero, cultura, società. Atti del Convegno internazionale di studi, Siena, 27-30 giugno 2001*, introduzione di A. Prosperi, 2 voll., Roma, Edizioni dell'Ateneo, 2003, Vol. I, pp. 65-96.

⁶⁵ Valier, *De rhetorica ecclesiastica ad clericos libri tres* [...], cit., p. 225. Un sintetico profilo dei modelli classici, cristiani e medievali ai quali fecero riferimento i trattati di retorica ecclesiastica post-tridentini è proposto da Giombi, *Precettistica e trattatistica*, cit., in partic. pp. 596-601.

⁶⁶ Sulle retoriche dell'atelier borromaico si vedano Fumaroli, *L'età dell'eloquenza*, cit., pp. 141-151; Bayley, *French Pulpit Oratory*, cit., pp. 45-53; C. Marazzini, *Il perfetto parlare. La retorica in Italia da Dante a Internet*, Roma, Carocci, 2001, pp. 169-174.

⁶⁷ Rusconi, *Rhetorica ecclesiastica*, cit., p. 16; Bayley, *French Pulpit Oratory*, cit., pp. 53-57.

visto, fu committente e attento revisore del trattato del Valier, ma non appena ebbe notizia della pubblicazione dei trattati dei due predicatori spagnoli si diede da fare per ottenerne una copia e, venutone in possesso, si impegnò per dare a questi la maggior visibilità possibile. A tale riguardo, O'Malley ha messo in evidenza come l'arcivescovo di Milano, per un verso, «inserì senza modifiche un breve estratto dell'opera di Estella nelle sue *Instructiones*, vedendosi poi scelto come dedicatario nell'edizione veneziana della retorica del francescano»⁶⁸ e, dall'altro, come si dirà più avanti, ebbe un ruolo chiave nella decisione di dare alle stampe la *Retorica* del Granada e quella del Valier in un'edizione congiunta, che fu affidata anch'essa all'inquisitore Marco Medici e che uscì a Venezia nel 1578 per i tipi di Francesco Ziletti⁶⁹.

La completezza, la struttura lineare, la chiarezza espositiva e l'approccio di fondo dei due testi spagnoli, orientati – come nel caso dell'opera del Valier – a far dialogare la cultura oratoria antica con quella teologica e patristica, furono senz'altro aspetti molto graditi dal Borromeo. Per certo, egli dovette giudicare positivamente il primato assegnato nell'opera di Estella alla finalità morale della predicazione, così come dovette incontrare la sua approvazione il

⁶⁸ Cf. O'Malley, *San Carlo Borromeo ed il «praecipuum episcoporum munus»*, cit., p. 64. A questo proposito Sagüés Azcona ha fatto notare che «el santo Cardinal supo en más de una ocasión utilizar los sabios preceptos contenidos en la obra del tradista franciscano. [...] Sobre todo, donde más se nota esto es en el capítulo XI [delle *Instructiones praedicationis Verbi Dei*, intitolato *Peccata studio concionatoris tollenda, quae frequentius contra divinae legis praecepta comittuntur*], que trata de los defectos que ha de evitar el predicador, pues en varios lugares coincide exactamente (a veces emplea hasta las mismas palabras) con las normas acerca de la misma materia establecidas por el Padre Estella en el capítulo XXXVII de su obra». L'edizione veneziana del *De Modus concionandi* di Diego de Estella uscì nel 1584 (apud Io. Baptistam Somascum) con una dedicatoria del curatore, Carlo Ferrari, a Carlo Borromeo ed ebbe una particolare importanza poiché, come ha osservato ancora Sagüés Azcona «de ella dependen [...] todas las otras ediciones publicadas en el extranjero, si se exceptúa la de Roma, en 1693». Per un approfondimento sui contenuti e fortuna del *Modus concionandi* e sulla figura di Diego de Estella, e per una lettura in edizione critica del trattato e della sua versione originaria in castigliano (*Modo de predicar*) si rimanda all'opera Diego de Estella, *Modo de predicar y Modus concionandi. Estudio doctrinal y edición crítica*, per P. Sagüés Azcona, 2 voll., Madrid, Instituto Miguel de Cervantes, 1951, per i passi qui citati: Vol. I, pp. 91, 259.

⁶⁹ Il tipografo Francesco Ziletti, infatti, presentava l'edizione ricordando che: «Cum has itaque rhetoricas ecclesiasticas a doctis quibusque vehementer probari, commendarique ex multis percepissem, Magister ac Reverendus F. Marcus Medices, Dominicanus, Doctor, Theologus Venetiarum Inquisitor, vir acri ingenio, limatoque iudicio Granatensem rhetoricam esse veluti explanationem Valeriana asseveranter praedictet, ambas in unum volumen ad commodiorem usum studiosorum compactas, typis nostris quam primum excudendas, atque edendas curavi». Francesco Ziletti, *Typographus lectori*, in *Ecclesiasticae rhetoricae sive de ratione concionandi libri sex, celeberrimo et prastantiss. tempestatis nostrae theologo Ludovico Granatensi monacho dominicano auctore, iamdiu quidem a studiosis optati atque expectati, nunc vero primum in lucem editi. Opus non solum utile, verum etiam pernecessarium ijs, qui concionandi laude praestare, et reip. Christianae, dum animarum saluti incumbunt, egregiam atque illustrem operam navare contendunt. His praeposuimus eiusdem argumenti libros tres, Augustini Valerii episcopi Veronae, ab auctore multis in locis novissima hac editione auctos, et meliores factos, Venetiis, apud Franciscum Zilettum, 1578, c. a2v.*

fatto che il frate francescano indicava l'omelia patristica come il modello per eccellenza di oratoria sacra al quale ogni predicatore era tenuto a guardare, aspetto – quest'ultimo – che si coniugava pienamente con il suo stesso stile di predicazione⁷⁰. Non vi sono dubbi, però, sul fatto che il Borromeo nutrì una particolare predilezione soprattutto per la *Retorica* del Granada, del quale conosceva e apprezzava già da tempo i sermoni a stampa, che consultava regolarmente proprio per la preparazione delle sue prediche⁷¹. Sappiamo che sull'opera del predicatore spagnolo egli aveva chiesto allo stesso Valier di esprimere un giudizio e questi, a tal proposito, nella lettera del 12 dicembre 1577 pronunciava parole di pieno apprezzamento:

Mi ha di più detto il medesimo Cataneo [p. Sebastiano Cattaneo] che V.S. Ill.ma havrebbe desiderato ch'io le scrivessi il parer mio della Rethorica ecclesiastica del p. Granada onde con questa occasione s'è fatta certa censura sopra l'uno et l'altro volume de Rethorica ecclesiastica la qual si manda. Dotto et molto pio padre è il p. Granada et tutte le sue opere son molto fruttuose⁷².

All'edizione congiunta delle due retoriche patrocinata dall'arcivescovo di Milano veniva data immediata esecuzione, tant'è che lo stesso Valier già il 27 dicembre di quell'anno poteva annunciare: «Il p. Inquisitor di Venetia ha pigliato carico di far stampar una et l'altra a Vinetia et già mi scrive haver dato principio»⁷³. Dell'impresa, realizzata come già si è ricordato nel 1578, sarebbe tornato a parlare in seguito lo stesso Valier nella sua autobiografia *De cautione adhibenda in edendis libris*, proponendo un interessante confronto tra le due opere:

Ubi editus fuit liber rhetoricae ecclesiasticae, sub eius titulo religiosorum virorum doctissimus, et doctissimorum religiosissimus, Aloysius Granatensis sex libros conscripsit, sententiarum gravitate, exemplorum varietate, et spiritus quodam fervore, tribus meis libris praestantiores valde. Quod opus duos post annos una cum nostro editum est. Nos brevis, dilucidius etiam fortasse; ille copiosius, et aliquanto obscurius rem tractavit. Plura ipse quam nos, ex Cicerone, et Quintiliano in rhetoricam ecclesiasticam transtulit. Ut nec doctrina, nec

⁷⁰ Si vedano a tal proposito le considerazioni avanzate da Sagüés Azcona in de Estella, *Modo de predicar y Modus concionandi*, cit., Vol. I, pp. 165-181, 188-205.

⁷¹ Sui rapporti intercorsi tra l'arcivescovo di Milano e Luis Granada si vedano: Giombi, *La predicazione di san Carlo*, cit., p. 75; Fumaroli, *L'età dell'eloquenza*, cit., pp. 148-156; e soprattutto A. Huerga, *Fray Luis de Granada y San Carlos Borromeo. Una amistad al servicio de la Restauración Católica*, «Hispania Sacra», XI, 1958, pp. 299-347; R. Robres Lluch, *San Carlos Borromeo y sus relaciones con el episcopado Ibérico post-tridentino, especialmente a través de fray Luis de Granada y san Juan de Ribera*, «Anthologia Annua», 8, 1960, pp. 83-141.

⁷² Lettera, Agostino Valier a Carlo Borromeo, Verona 13 dicembre 1577 (F. 50 inf., n. 39, cc. 98r-98v; edita in Tacchella 1972, p. 112).

⁷³ Lettera, Agostino Valier a Carlo Borromeo, Verona 27 dicembre 1577 (BAM, F. 140 inf., n. 213, cc. 450r, 469v).

dicendi facultate cum tanto viro conferendi sumus, ita nec rhetorica ecclesiastica quam conscripsimus nos, cum illa quam ipse edidit, conferenda est⁷⁴.

I due trattati, come faceva notare il vescovo di Verona, a fronte di una effettiva comunanza di intenti, per cui entrambi si proponevano di delineare le regole della buona retorica ecclesiastica, presentavano nei fatti due strade diverse, ancorché fondate sul medesimo principio di compenetrazione tra la lezione dei classici e la sapienza dei cristiani. Così, se Granada poneva l'accento sull'*inventio* della forma, ispirandosi a Cicerone e a Quintiliano, il Valier, pur avendo ben presenti i due modelli antichi, esaltava la *brevitas*, richiamandosi al paradigma aristotelico; e ancora, se il primo proponeva un discorso stilisticamente costruito, basato su uno stretto connubio tra teologia e retorica, il secondo, sebbene muovesse dallo stesso presupposto, presentava una prosa più asciutta, fondata su una perfetta aderenza tra *res* e *verba*. Queste differenze di fondo rendevano le due opere adatte per pubblici diversi, che il tipografo Francesco Ziletti, nella premessa alla *Retorica* del Valier inclusa nell'edizione congiunta dei due trattati del 1578, distingueva in modo netto in questi termini:

Sic viri docti duobus voluminibus sub eodem titulo editis sentiunt. Episcopi, ut est brevius, ita dilucidius, usque fuit ad usum clericorum discentium scriptum, ita in scholis posse commodius, et maiore fortasse cum audientium fructu explicari. A Theologis vero et probatis concionatoribus (ab quos minime ipse videtur scripsisse) ex eo non magnam utilitatem percipi posse. Contra vero, Lusitani opus vel a doctissimis etiam Theologis, ab egregiisque concionatoribus utiliter admodum, ob variam, multiplicemque in illo eminentem doctrinam perlegi posse⁷⁵.

Lo Ziletti metteva bene in evidenza la complementarità esistente tra le due *Retoriche*, che proponevano livelli di complessità diversi, a fronte di una comune idea di oratoria sacra. L'una era stata scritta per i chierici dei seminari e l'altra risultava più adeguata per teologi e predicatori provetti, ma per entrambe il compito primo dell'oratore cristiano rimaneva lo stesso e si realizzava nella capacità di *movere* gli animi degli ascoltatori.

La posizione espressa dal tipografo Ziletti rifletteva quella del Borromeo che, a distanza di qualche anno dalla pubblicazione dell'edizione congiunta del 1578, consultato dal prefetto degli studi del Seminario di Milano Domenico

⁷⁴ Valier, *De cautione*, cap. XXXIV, pp. 230-231.

⁷⁵ Francesco Ziletti, *Candido lectori*, in Granada, *Ecclesiasticae rhetoricae sive de ratione concionandi libri sex*, cit., c. a3v. Il Lusitano al quale si riferisce lo Ziletti è naturalmente padre Luis Granada, che trascorse quasi la metà della sua vita in Portogallo, dove risiedette stabilmente a partire dagli anni 1556-1560, periodo in cui ricoprì l'incarico di Provinciale, fino alla morte, avvenuta nel 1588. Va ricordato, inoltre, che il portoghese fu tra le lingue letterarie utilizzate dal Granada, insieme al castigliano e al latino e che in portoghese, come si è sottolineato recentemente, «escribió la casi totalidad de su obra». E.J.A. Romo, *La obra portuguesa de Fray Luis de Granada*, «Cuadernos para investigación de la literatura hispánica», n. 29, 2004, pp. 63-80, in partic. pp. 4-5.

Ferro sull'opportunità o meno di far adottare ai seminaristi l'una o l'altra retorica, rispondeva:

Se bene mi piaccia che si leggesse più tosto la retorica del Granada che di Mons. di Verona per esser quella più piena et consumata, nondimeno questa con methodo et ordine assai accomodato, credo che sarà profittevole modo pigliare dall'una et all'altra quel che vi parerà a proposito e tritarlo alla pratica anco negli essercitii medesimi del predicare il che tutto mi rimetterò a vostro giudizio⁷⁶.

Sia il Valier che il Granada, in fondo, pur nella diversità dell'impianto delle loro opere, guardavano a una retorica capace di intercettare bisogni, esigenze ed emozioni dell'uditorio, veicolando contenuti significativi in forme e modi efficaci e trasparenti, con l'obiettivo non tanto di incontrare l'approvazione del pubblico, ma di stimolare in esso un'autentica *compunctio cordis*, ritenuta preludio primo per ogni percorso terreno di redenzione e di perfezionamento spirituale⁷⁷.

2. Del «trattar della cose cristiane e spirituali col popolo»: il progetto dell'Omiliario per la Chiesa ambrosiana

Descritte le coordinate teoriche entro le quali si compì la rinascita della retorica sacra dopo Trento, viene da interrogarsi sulle ricadute pratiche del cambiamento di scenario incoraggiato dalle disposizioni conciliari. Anche su questo versante le strade di Carlo Borromeo e Agostino Valier si incrociarono. Oliver Logan ha evidenziato come «we do not have sermons that Valier delivered in his own diocese but we do have the *Homilies* written at the request of Carlo Borromeo for the use of the clergy of Milan diocese (i.e. following the order of Gospel readings for the Ambrosian rite)»⁷⁸. L'*Omiliario* che il Valier scrisse su istanza del Borromeo per agevolare l'applicazione del dovere della

⁷⁶ Minuta, Carlo Borromeo a Domenico Ferro, 28 ottobre 1581 (BAM, P. 20 inf., c. 520v; edita da Marcora, *Introduzione*, in Borromeo, *Arbores De Paschate*, cit., p. 17). Su Domenico Ferro, primo membro della Congregazione degli Oblati a ricoprire la carica di prefetto degli studi, allorquando la direzione del Seminario di Milano nel 1578 passò dai Gesuiti agli Oblati, si veda E. Fustella, G.B. Fornaroli, *Biografie dei sacerdoti che si fecero oblato al tempo di S. Carlo (1578-1584)*, «Memorie storiche della diocesi di Milano», vol. 12, 1965, p. 122.

⁷⁷ La priorità assegnata al *commovere* nelle retoriche borromaiche è messa in evidenza da A. Battistini, *Tra l'istrice e il pavone. L'arte della persuasione nell'età dei Borromeo*, «Studia borromaica», n. 21, 2007, pp. 21-40, in partic. pp. 31-43. Si vedano, a questo riguardo, anche le definizioni di retorica ecclesiastica proposte dai due autori: Valier, *De rhetorica ecclesiastica ad clericos libri tres [...]*, *Praelectio secunda*, p. 283; Granada, *Ecclesiasticae rhetoricae sive de ratione concionandi libri sex*, cit., lib. II, cap. I: *Quid sit Rhetorica, quae eius materia, quod officium et finis, et quae sin eius partes*, pp. 32-33.

⁷⁸ Logan, *The Venetian upper clergy*, cit., p. 277.

predicazione presso il clero diocesano milanese, in effetti, proprio in ragione della mancanza di un omiliario valeriano per la Chiesa di Verona, può essere considerato un'ottima fonte per comprendere le funzioni e le caratteristiche attribuite dal Valier all'attività di predicazione ordinaria, per affiancare la quale nasceva l'*Omiliario* ambrosiano, e anche per acquisire elementi inerenti il suo personale metodo di predicazione.

A questo progetto egli iniziò a lavorare sin dal 1573, mentre portava a termine quello del *De Rhetorica ecclesiastica*, tanto che l'arcivescovo di Milano in una lettera del marzo di quello stesso anno gli rivolgeva parole cariche di riconoscenza per la solerzia con la quale egli aveva risposto a questa sua nuova richiesta:

Per la lettera di V.S. de 2 [di marzo] mi è piaciuto sommamente che ella appresso a le altre fatiche per questa mia diocese habbi pigliato anche questa di attendere a quelle homelie delle quali le parlò P. Adorno per parte mia, et ne ringratio pur assai la amorevolezza di V.S. alla quale questa mia Chiesa haverà d'haver molt'obbligo di queste sue sì honorate et sante occupationi le quali però le ricordo et prego a pigliar con sua comodità⁷⁹.

Nella stessa lettera il Borromeo faceva presente che presto il Valier sarebbe stato raggiunto da un prete veronese al suo servizio, Francesco Lino, con il Messale Ambrosiano, così da consentirgli di strutturare la raccolta di omelie che si accingeva a comporre secondo il rito ambrosiano⁸⁰.

In realtà il card. Carlo Borromeo aveva in animo da tempo il proposito di elaborare un *Omiliario* per la sua Chiesa, almeno sin dal 1565, da quando cioè aveva raggiunto stabilmente la sede ambrosiana, e lo aveva anche reso noto proprio in quell'anno, in occasione del suo primo concilio provinciale⁸¹. Va detto, inoltre, che il vescovo di Verona non era stato neanche il primo al quale il cardinale si era rivolto per realizzare quest'impresa. Egli infatti, in origine,

⁷⁹ Minuta, Carlo Borromeo ad Agostino Valier, Milano 11 marzo 1573 (BAM, F. 46 Inf., n. 56, c. 97r; edita in Tacchella 1972, p. 66 e in Marcora, *Introduzione*, cit., pp. 11-12 e nota n. 9). Con la lettera del 2 marzo, alla quale fa riferimento il Borromeo nella sua dell'11 marzo appena richiamata, il Valier accettava il nuovo incarico con un certo slancio, mostrando di essersi subito attivato per portare a compimento l'impresa in tempi rapidi: «Il p. Adorno – affermava il vescovo di Verona – mi scrisse alli dì passati l'intentione di V.S. Ill.ma intorno quelle homelie che desidera che si faccino per il suo clero, nel che mi affaticherò et spero di darle qualche satisfatione in non molto tempo. Ho mandato a veder a Venetia et a Padoa se si potesse haver un Messale all'Ambrosiana ma in fatti non se ne trovano aspetterò chel Lino me ne mandi uno, al quale già alcune settimane feci scrivere, et fatta la Synodo mi metterò a questa impresa confidandomi che non mi possi mai riuscire male alcuna cosa che mi sia commandata da V.S. Ill.ma mossa come son certo dal Spirito di Dio». Lettera, Agostino Valier a Carlo Borromeo, Verona 2 marzo 1573 (BAM, F.85 inf., n. 36, cc. 64r-65v).

⁸⁰ Per un inquadramento dell'atteggiamento del Borromeo verso il rito ambrosiano: C. Alzati, *Carlo Borromeo e la tradizione liturgica della Chiesa milanese*, in Buzzi, Zardin (edd.), *Carlo Borromeo e l'opera della «grande riforma»*, cit., pp. 37-46.

⁸¹ *Concilium provinciale mediolanense I*, par. *De praedicatione verbi Dei*, in AEM 1582, pars I, c. 3v.

aveva pensato al vescovo di Lanciano Leonardo Marini, con il quale ebbe modo di lavorare a stretto contatto in occasione della compilazione del *Catechismo romano*⁸²; poi, viste le esitazioni di quest'ultimo, si era rivolto, per tramite di Cesare Speciano, al suo «scrittore preferito», padre Luis Granada, ma anche in questo caso non aveva ottenuto il riscontro sperato⁸³. Preso atto del fallimento di questi tentativi, l'arcivescovo aveva giocato la carta del fidato e solerte vescovo di Verona, il quale aveva accettato prontamente anche questo nuovo incarico, tanto che già il 15 luglio 1573, subito dopo aver riferito all'arcivescovo circa gli ultimi sviluppi del *De Rethorica ecclesiastica*, poteva presentare un bilancio decisamente positivo del lavoro compiuto per l'*Omiliario*:

Son stato avertito che sarebbe molto a proposito aggiunger al libro quella Sinopsi et anco certe prelezzioni, che io credo haver mandata a V.S. Ill.ma con due piccole tavole, ma anco in ciò mi rimetto al giudizio di quelli alli quali ella commetterà la cura di questa cosa, non volendo lasciar di dirle ch'io pensavo che ella si fosse contentata differir non solo alla venuta del Padre Adorno ma ancora fin che le homelie, che ella mi ha commesso, fossero finite et questo pensiero ha causato ch'io ho messo qualche studio per mandarle più tosto, ch'io poteva, le dette homilie; ma in verità ritrovo che bisognerà metterci della fatica e del tempo. Ho già cominciato a far sermoni sopra tutti li Evangelii de tutti li Santi, onde credo, che saranno più di cento et voglio sperar che il Signor Dio mi darà gratia di dar qualche poco di satisfattione a V.S. Ill.ma come desidero, e se piacerà a S. Divina maestà che io venghi questo settembre a basciarle le mani spererò portar meco almeno la quinta parte⁸⁴.

Erano trascorsi appena cinque mesi da che il Borromeo si era rallegrato con il Valier per la risposta positiva data alla sua nuova committenza e questi si era applicato all'impresa con tale impegno che poteva annunciare di aver composto, in così breve tempo, più di cento omelie. Il vescovo di Verona sapeva che il suo lavoro doveva essere sottoposto ad un accurato processo di revisione, per il quale, anche in questo caso, poteva fare affidamento sul padre Adorno,

⁸² P. Paschini, *Il catechismo romano del Concilio di Trento: sue origini e sua diffusione*, in Id., *Cinquecento romano e riforma cattolica. Scritti raccolti in occasione dell'ottantesimo compleanno dell'autore*, Romae, Facultas theologica Pontificii athenaei Lateranensis, 1958, pp. 35-91; sulla partecipazione del Marini ai lavori di compilazione del *Catechismo romano*, in partic. pp. 53-54.

⁸³ Per quanto riguarda la richiesta avanzata a Leonardo Marini, va detto che era il 6 maggio 1565, quando questi articolava la sua risposta di diniego all'invito dell'arcivescovo di Milano. Il vescovo di Lanciano era a Roma, stava attendendo alla revisione del *Catechismo Romano* ed era ansioso di raggiungere la sua diocesi per dare applicazione ai decreti tridentini. Due anni dopo, in una lettera del 3 dicembre 1567, Leonardo Marini, passato alla sede episcopale di Alba, tornava sull'argomento, prospettando al Borromeo una possibilità, in quanto gli riferiva che aveva intenzione di visitare la sua diocesi e che, se gli fosse riuscito di trovare un segretario per annotare le prediche tenute in questa occasione, avrebbe potuto facilmente mettere insieme l'*Omiliario* richiesto dal Borromeo. «Ma – ha osservato Carlo Marcora – il Marini moriva a Roma nel 1573 e di quanto avesse scritto per l'*omiliario* non sappiamo». A testimonianza del tentativo fatto con il Granada, invece, rimane una lettera inviata dal Borromeo a Cesare Speciano il 27 giugno 1571. Per un approfondimento di questi passaggi si rimanda a Marcora, *Introduzione*, cit., pp. 10-11.

⁸⁴ Lettera, Agostino Valier a Carlo Borromeo, Verona 15 luglio 1573 (BAM, F. 85 Inf., n. 58, cc. 109r-110v; edita in Tacchella 1972, pp. 104-105).

ma non poteva immaginare che tale processo sarebbe stato molto più lungo di quello del *De Rhetorica ecclesiastica* e che non avrebbe mai portato l'opera agli onori delle stampe.

A distanza di otto anni, infatti, sappiamo che il Valier stava ancora lavorando all'*Omiliario* e ad informarci di ciò è lo stesso Borromeo con una lettera del 25 gennaio 1581 indirizzata a un antico amico dei due prelati. La lettera era rivolta a Silvio Antoniano, che veniva rimproverato severamente dall'arcivescovo di Milano perché aveva cercato di «scaricare la fatica pertinente all'educatione de figliuoli» sul povero vescovo di Verona; in quell'occasione, il Borromeo aveva richiamato il sacerdote romano ai suoi doveri, ricordando che il Valier non poteva dedicarsi alla scrittura del trattato educativo che egli aveva commissionato espressamente all'Antoniano l'anno precedente, in quanto il vescovo era già impegnato nella stesura di «un Homiliario Ambrosiano sopra tutti gli Evangelii correnti per servizio di q[ues]ta chiesa»⁸⁵. Succedeva così che, pochi mesi dopo, per l'esattezza il 1° aprile 1581, per uno strano intreccio dei destini, sia l'Antoniano che il Valier scrivevano al Borromeo, l'uno per inviare la «tavola dei capitoli»⁸⁶ dei *Tre libri dell'educatione christiana dei figliuoli*, e l'altro per comunicargli che aveva terminato la prima stesura dell'*Omiliario*.

«Ho finite le Homilie, che sono 112», aveva annunciato il vescovo di Verona al Borromeo nella missiva del 1° aprile, ma l'*Omiliario* non si poteva dire di certo concluso⁸⁷. C'erano ancora tanti aggiustamenti e correzioni da fare ed il primo ad averne consapevolezza era lo stesso autore dell'opera. Il risultato raggiunto non doveva essere molto distante dalla stesura iniziale del 1573, almeno per quanto riguarda il numero complessivo delle omelie, evidentemente il Valier era stato costretto a rallentare, se non a sospendere, il progetto dell'*Omiliario*; d'altra parte, in quegli anni le emergenze da gestire e gli impegni non erano mancati, basti ricordare solo che nel 1575-76 a Verona, come in quasi tutta Italia, c'era stata la peste e che sin dal 1578 il Valier era stato impegnato quasi a tempo pieno nell'incarico di visitatore apostolico, prima della Dalmazia, poi dell'Istria e ultimamente, proprio mentre riprendeva il lavoro dell'*Omiliario*, di Venezia. Non ci è dato di conoscere con esattezza come andarono le cose; fatto sta che questa nuova fatica del Valier per la Chiesa ambrosiana si era trascinata negli anni fino a giungere alla primavera del 1581, quando egli la riprendeva in mano con l'intenzione di portarla a compimento il prima possibile⁸⁸. Il Valier,

⁸⁵ Minuta, Carlo Borromeo a Silvio Antoniano, Viboldone 25 gennaio 1581 (BAM, P. 21 inf., Vol. I, cc. 57v-58r; edita in E. Patrizi, *Silvio Antoniano. Un umanista ed educatore nell'età del Rinascimento cattolico (1540-1603)*, 3 voll., Macerata, eum, 2010, Vol. II, pp. 687-688).

⁸⁶ Lettera, Silvio Antoniano a Carlo Borromeo, Roma 1° aprile 1581 (BAM, F. 87 inf., cc. 380r, 385v; edita in E. Carbonera, *Silvio Antoniano o un pedagogista della Riforma cattolica*, Sondrio, Stabilimento tipografico E. Quadrio, 1902, cit., p. 147; Patrizi, *Silvio Antoniano*, cit., Vol. II, pp. 692-693).

⁸⁷ Lettera, Agostino Valier a Carlo Borromeo, Verona 1° aprile 1581 (BAM, F. 88 inf., n. 195, cc. 398r, 403v; edita in Tacchella 1972, p. 122).

⁸⁸ Dallo spoglio dello scambio epistolare tra il vescovo di Verona e il Borromeo emerge un

infatti, il 12 giugno di quell'anno tornava a scrivere al Borromeo per sottoporgli alcune questioni relative alla stampa dell'opera:

Ho parlato con uno di questi stampatori per l'Homiliario, ma in verità non ardisco far stampare tante homilie senza farle vedere, perché oltre che non mi posso chiamar dotto, conosco per esperienza, ch'anco quelli, che sono chiamati dotti, alle volte errano. Aspettandosi di qua il P. Adorno seguirò il consiglio suo o di mandarlo o di farlo veder di qua a qualche persona, oltre il P. Inquisitore, il giudizio del quale secondo il solito si suole estendere solamente a' dogmi; nei quali son certo, che non si sarà preso errore. Ma il mio desiderio sarebbe che se ne facesse la censura ancora sopra il giudizio, et sopra il spirito, onde l'opera riuscisse più fruttuosa⁸⁹.

Questa attenzione mostrata dal Valier rispetto alla revisione del suo lavoro, non era semplicemente figlia di un'epoca che applicava sistematicamente la censura delle opere, ma era soprattutto riflesso del senso di responsabilità di un vescovo, convinto del fatto che chiunque volesse lasciare insegnamenti utili ai posteri si doveva interrogare onestamente sulle proprie capacità, dato che la quantità di testi da conoscere per ogni disciplina era enorme e alimentata costantemente dall'industria tipografica, al punto che risultava difficile da dominare anche per gli uomini più eruditi dei vari settori⁹⁰.

Il Valier, però, non era interessato solo ad avere il consiglio di qualche persona dotta, che potesse passare in rassegna il suo lavoro e dare un parere competente sui contenuti, egli voleva anche consultare quegli schemi simili ad «arbori», che il Borromeo era solito stendere per preparare le sue prediche. L'arcivescovo di Milano aveva mostrato al Valier, in occasione di un loro incontro, questi «schizzi» scritti in latino, simili nella struttura a degli alberi genealogici, che egli utilizzava per organizzare i concetti da sviluppare oralmente nelle sue prediche, durante le quali adottava rigorosamente il volgare⁹¹. Di questi schemi, che

rapido cenno a questo lavoro nell'epistola del 27 dicembre 1577, nella quale il Valier, subito dopo aver informato il Borromeo del fatto che era stata avviata la stampa dell'edizione veneziana contenente la sua *Rhetorica* e quella del padre Granada, riferiva: «Delli Sermoni scriverò con più commodità a V.S. Ill.ma». Lettera, Agostino Valier a Carlo Borromeo, Verona 27 dicembre 1577 (BAM, F. 140, c. 450r).

⁸⁹ Lettera, Agostino Valier a Carlo Borromeo, Venezia 12 giugno 1581 (BAM, F. 60 inf., n. 91, cc. 141r-142v; edita in Tacchella 1972, p. 127).

⁹⁰ A questo proposito, nel *De cautione abhibenda in edendis libris* (op. cit., cap. XLI, pp. 245-246) il Valier affermava: «non est enim magnus illorum virorum numerus, optime Silvi [Silvio Antoniano], in tanta varietate linguarum, et in tam magna copia librorum quibus obruimur, qui re vera ita sint docti, ut docere posteritatem queant, ut facile lucubrationes suas edendas statuunt». Egli muoveva da una concezione etica della scrittura, per cui riteneva più proficuo far circolare molti scritti in forma manoscritta all'interno di circuiti ristretti di comunicazione, anziché contribuire al profluvio indiscriminato delle opere a stampa. A questo principio adeguò la sua vasta produzione letteraria, scegliendo di dare alle stampe, come teneva a precisare proprio nel *De cautione*, solo gli scritti di carattere squisitamente pastorale.

⁹¹ Lettera, Agostino Valier a Carlo Borromeo, Verona 1° aprile 1581 (BAM, F. 88 inf., n. 195, cc. 398r, 403v; edita in Tacchella 1972, p. 122). Alcuni schemi di preparazione delle prediche del Borromeo sono pubblicati nel volume intitolato *Arbores de Paschate* (op. cit.), curato da

aveva visto tempo addietro, il vescovo di Verona si era ricordato mentre stava lavorando alle omelie per la Chiesa ambrosiana e manifestava apertamente il suo desiderio di poterli visionare già nella lettera del 1° aprile con la quale comunicava la conclusione della prima stesura dell'*Omiliario*. L'arcivescovo, tuttavia, non era affatto disposto ad assecondare l'amico nella sua richiesta e gli rispondeva a stretto giro presentando le ragioni del suo diniego:

Aspetterò con molto desiderio che V.S. mi mandi le Homelie, che ha già finite; perché le gusterò così pure, come sono uscite da lei, senza che vi siano mescolati quelli miei concetti. Ma quanto ci renderemo (sic) una volta insieme con la gratia del Signore le mostrerò quegli schizzi, acciò ch'ella ne cavi quel che le parrà a proposito: il che difficilmente potrebbe V.S. far senza me per esser molto confusi; et questa è stata la principal cagione, che mi ha indotto a non gliene mandar per hora⁹².

Il Borromeo sembrava irremovibile su questo punto: i suoi 'arbori' potevano essere visti solo in sua presenza e con il supporto della sua interpretazione, perché così com'erano risultavano talmente difficili da comprendere, che non sarebbero stati di alcun aiuto al Valier ai fini della revisione dell'*Omiliario*.

Intanto, agli inizi di settembre, il manoscritto dell'opera, superate alcune indecisioni sulle modalità di consegna, arrivava a Milano per tramite del domenicano Sebastiano Cattaneo e veniva subito affidato al padre Adorno, al quale era stato assegnato nuovamente il compito di revisore⁹³. Qualche mese dopo, precisamente il 4 novembre, il Valier nel ricordare al Borromeo la richiesta

Carlo Marcora, nel quale sono raccolti gli *arbores* dedicati al ministero della Pasqua presenti nel manoscritto F. 189 inf. (cc. 63-88) della Biblioteca Ambrosiana di Milano.

⁹² Minuta, Carlo Borromeo ad Agostino Valier, [Milano] aprile 1581 (BAM, P. 21 inf., c. 428r; edita in Tacchella 1972, p. 76).

⁹³ Il 28 giugno 1581 il Borromeo scriveva al Valier confermando la scelta di padre Adorno come revisore dell'*Omiliario*: «Può V.S. sodisfarsi con far rivedere l'Homiliario anco quanto allo spirito, come ella desidera; et a me ancora par bene, et per questo non saprei trovar persona più al proposito, che il padre Adorno istesso, il quale è già arrivato a Milano: onde potrebbe V.S. mandar là qualcuno con l'Homiliario perché egli attendesse diligentemente a dargli una rivista» (BAM, F. 60 inf., n. 82, cc. 129r-129v, edita in Tacchella 1972, p. 78). Il manoscritto non era arrivato subito a Milano, era sopraggiunto qualche contrattempo nel mezzo, che il Valier spiegava al Borromeo in una lettera del 31 agosto 1581 (BAM, F. 53 inf., n. 185, cc. 337r-378v; edita in Tacchella 1972, pp. 122-124): «Essendo stato alquanto indisposto da che sono giunto, non ho potuto rivedere l'Homiliario, il quale son stato per consegnare all'apportatore di questa. Ma mi son trattenuto havendo inteso a Padova dai Padri Gesuiti, che il Padre Adorno è per venire in queste parti per vedere il Padre Benedetto; et perché non vorrei per assai, che si perdesse questo esemplare, ho pensato di aspettare detto padre Adorno et non venendo per messo a posta. Et in questo mezzo migliorando in qualche parte». Al termine della lettera aggiungeva la seguente postilla autografa: «Doppo scritta questa è giunto qua il Catanio, al quale mi è piaciuto di dargli l'Homiliario il quale ha bisogno di molte correptioni; et hora che spero che sarò libero di visite potrò farli qualche miglioramento se mi sarà rimandato». Il 6 settembre il vescovo di Verona scriveva al Borromeo per avere un riscontro circa l'avvenuta ricezione del manoscritto (BAM, F. 88 inf., n. 203, cc. 409r-410v; edita in Tacchella 1972, pp. 128-129) e questi prontamente il 18 settembre gli rispondeva: «Dal Cataneo ho ricevuto insieme con la sua lettera l'Homiliario, che mi è stato car.mo, et hollo [dato] al P. Adorno che lo anderà vedendo per rimandarlo poi a V.S.

del padre Adorno come predicatore per la Quaresima, manifestava anche la sua volontà di approfittare della venuta del padre per ragionare insieme sulle correzioni da apportare all'*Omiliario*:

Aspetterò che V.S. Ill.ma passate le feste di Natale lasci venire P. Adorno per la predicatione della Quaresima, il quale si pur terrà i sermoni fatti sopra il messale Ambrosiano, saranno senza dubbio assai migliorati da me in quel tempo, che non sarò tanto occupato quanto son stato in questi tre anni prossimi⁹⁴.

Per la Quaresima del 1582, tuttavia, il Valier non poté contare sul gesuita, che indebolito dalla difficile convalescenza di una malattia, preferì rimanere a Milano, mettendo il vescovo di Verona nella condizione di dover provvedere personalmente a molte delle prediche quaresimali. Il processo di revisione dell'*Omiliario*, in ogni caso, continuò e poté giovare anche del contributo del Borromeo, che al suo solito seguì con solerzia gli stadi di avanzamento dell'opera, offrendo il suo apporto anche sul piano dei contenuti.

Il vescovo di Verona, difatti, era tornato a chiedere al Borromeo di visionare gli 'arbori' delle sue prediche e questi, da parte sua, rispetto alla posizione iniziale di totale chiusura, sembrava ora disposto a qualche apertura, come rivela la lettera dell'8 dicembre 1581:

Quelle tessere dei miei sermoni che V.S. desidera che io le mandi sono tanto imperfetti et parte anco tanto mal scritti che io stimavo che difficilissimamente ella havrebbe potuto cavarne costruttione alcuna se non fossimo stati qualche giorno insieme onde io medesimo havessi potuto darle qualche lume del senso mio et perciò disegnavo di non mandargliele et ci havevo dentro un'altra consideratione che quella che sia meglio scritta, le quali furno fatte in quei principi sono anco, quanto a i sensi, più imperfette delle altre che sono state fatte da poi che ci havevo pure un poco più maturato questo essercitio. Tuttavia, havendone hora riviste alcune fatte per la festa di S. Ambrosio, ho voluto far prova di mandargliele acciò che veda se ne può cavare qualche cosa a sua sodisfatione e mi mandi poi subito quel che con essa avrà fatto, perché l'aviserei poi di quel che mi occorresse. Se poi io vedessi che le riuscisse di cavarne qualche cosa piglierei questo modo di andare rivedendo ogni settimana le tessere fatte nelle feste e domeniche corse (?) in quel tempo, le manderei a V.S. con aggiungere forse anco qualche cosa o almeno darle qualche avvertenza per la intelligentia et ella potrebbe mandarmi di mano in mano quel che avesse fatto, di maniera che in capo all'anno fra le tante fatiche sue et quell'ombra che ella potesse ricavare da quelle poche mie tessere, havessimo fatto uno novo homiliario insieme tanto più che la materia di queste sinopsi è così abbondante che per estenderle sarebbe necessario far più sermoni sopra ciascuno⁹⁵.

con le considerationi che ci harà fatte sopra» (BAM, P. 21 inf., cc. 393r-393v; edita in Tacchella 1972, pp. 79-80).

⁹⁴ Lettera, Agostino Valier a Carlo Borromeo, Verona 4 novembre 1581 (BAM, F. 88 inf., n. 205, cc. 415r-415v, 421v; edita in Patrizi, *Silvio Antoniano*, cit., Vol. II, p. 703).

⁹⁵ Minuta, Carlo Borromeo ad Agostino Valier, Milano 8 dicembre 1581 (BAM, P. 21 inf., cc. 325v-326r; pubblicata in Marcora, *Introduzione*, cit., pp. 12-13).

Il Borromeo, dunque, manifestava l'intenzione di rivedere gradualmente i suoi 'arbori' e di sottoporli, una volta aggiustati e corretti, al giudizio del Valier. L'arcivescovo fissava, pertanto, un preciso *modus operandi* circa la consultazione dei suoi 'schizzi' di prediche, dal quale non era affatto intenzionato a discostarsi, tant'è che, quando nel settembre del 1582 il Valier chiedeva di essere messo a parte «delli concetti raccolti della passione di N.S. Iesu Christo»⁹⁶, Carlo Borromeo ribadiva la posizione stabilita, affermando:

Io non le mando quegli arbori sopra la passione di N.Sig.re, ch'ella mi richiede, per havergli incassati et avviluppati con altre scritte, ma le mando bene l'arbore che ho fatto in questa festa di San Matteo, nella quale mi è occorso ragionare nella chiesa di Sabioneta et mi risolsi poi metter giù i capi et affetti che Dio mi diede in quell'occasione. Le mando tanto più volentieri quanto so che per haver ella ancora ragionato sopra la medesima materia le sarà di maggior satisfattione⁹⁷.

Da ciò apprendiamo che alcuni 'arbori' borromaici, rivisti e messi in bella copia, arrivarono al Valier e che questi, nonostante a quel tempo fosse impegnato anche nella revisione dei *Tre libri dell'educatione christiana* dei figliuoli di Silvio Antoniano, continuò a dedicarsi all'impresa dell'*Omiliario*, integrando e migliorando quanto scritto, anche sulla base degli elementi ricavati dagli schemi di prediche inviati dal Borromeo. Lasciata Sabbioneta, dove si era recato per officiare i funerali della sorella Camilla, una volta raggiunta Roma, l'arcivescovo poté visionare alcuni saggi del lavoro compiuto dal vescovo di Verona a partire dai suoi 'arbori', rispetto al quale esprimeva parole di sincero apprezzamento:

Non mi sono meravigliato, che V.S. habbia arricchite et sia per ampliare maggiormente quelle materie seminate da me angustamente in quei foglietti, essendomi nota la fecondità del suo ingegno et il suo costume di dar molto per il poco che riceve. [...] Le Homelie o sermoni continuati, o spartiti mi piacciono nell'una et l'altra forma. Ruperto Abbate che V.S. commenda, ha veramente nobilissimi concetti. Non ha dubbio che la Passione di N.S. Giesù Christo è la base dove si devono fondare et appoggiare tutti quelli che vogliono trattare delle cose cristiane, et spirituali col popolo⁹⁸.

Era il 14 dicembre 1582 e il processo di revisione dell'*Omiliario* stava andando avanti, ma non si poteva certo dire vicino alla conclusione: c'erano alcuni aspetti dell'opera che ancora non convincevano e a metterli in evidenza era stato un comune amico dei due prelati, nonché collaboratore fidato del

⁹⁶ Lettera, Agostino Valier a Carlo Borromeo, Verona 21 settembre 1582; BAM, F. 64 inf., n. 2, c. 2r-3v; edita in Patrizi, *Silvio Antoniano*, cit., Vol. II, p. 713).

⁹⁷ Minuta, Carlo Borromeo ad Agostino Valier, Sabbioneta 25 settembre 1582 (BAM, P. 22 inf., c. 129v; pubblicata in Marcora, *Introduzione*, cit., p. 13).

⁹⁸ Minuta, Carlo Borromeo ad Agostino Valier, Roma 14 dicembre 1582 (BAM, P. 22 inf., cc. 197r-197v; edita in Tacchella 1972, pp. 85-86 e in E. Patrizi, *Silvio Antoniano*, cit., Vol. II, pp. 715-716).

Borromeo, vale a dire Silvio Antoniano. Apprendiamo del parere espresso dal sacerdote romano proprio da una lettera del Valier, nella quale egli scrivendo al Borromeo affermava:

Messer Silvio Antoniano m'ha scritto d'haver ragionato con V.S. Ill.ma dei sermoni fatti da me, così della Passione come degli altri, dicendomi che li parono più da Vescovo, che da parroco. Io credo che siano di poca consideratione e per vescovi e per parrochi; considerando la debolezza mia, et la poca diligentia, che ci ho posta, di che merito molta riprensione.

L'Antoniano, dunque, aveva giudicato l'*Omiliario* del Valier troppo 'alto' nei contenuti e distante dal fine di ampia divulgazione che si proponeva il committente. Questa opinione evidentemente non era stata accolta con particolare favore dall'autore, che avanzava una richiesta precisa al Borromeo a questo riguardo, dichiarando apertamente:

Voglio supplicare V.S. Ill.ma che si degni lasciarmi prendere gusto di finire i sermoni di tutto il Messale in quella forma et spiegar anco nel modo incominciato quelle parole cavate da' suoi libretti, non volendo lasciar di notar con nuovo studio delle cose che giudicherò che siano buone per parrochi poco letterati. Giudico che il detto Messer Silvio, sacerdote di santi costumi e di molta e varia cognitione di lettere, assai anco esercitato nello scrivere, sarà molto buono per servire in quest'opera V.S. Ill.ma. Ma alla meglio di tutti può scrivere e dare schemi di scrivere ad altri. Quel poco c'haverò potuto far io, resterà nelle mani sue per memoria della molta osservanza e cordiale affettione accompagnata da molti obblighi che le porto⁹⁹.

Il Valier voleva chiudere il prima possibile l'impresa dell'*Omiliario* e non era intenzionato a rimettere in discussione l'impostazione generale del lavoro né quella data all'altra opera della quale faceva cenno nella lettera. Si può supporre che il vescovo di Verona, in quest'ultimo caso, facesse riferimento al *De Oratione* o *De Arte meditandi*, un trattato sul metodo di meditare, commissionato anch'esso dal Borromeo, al quale aveva iniziato a dedicarsi sin dal settembre del 1582, sulla base di alcuni 'arbori' inerenti le pratiche della meditazione, preparati proprio dall'arcivescovo¹⁰⁰. Ora, se del *De Oratione*,

⁹⁹ Lettera, Agostino Valier a Carlo Borromeo, Verona 19 gennaio 1583 (BAM, S.Q.II+13, n. 126, cc. 260r-260v, 265r-256v; edita in Tacchella 1972, pp. 133-135; Marcora, *Introduzione*, cit., pp. 13-14).

¹⁰⁰ Il *De oratione* prese le mosse da questi 'arbori' sulla maniera di meditare dell'arcivescovo di Milano, che il Valier aveva provveduto a sviluppare, prima, in tavole sinottiche e, poi, in una parafrasi delle tavole. Il 4 dicembre 1583 il Valier poteva annunciare la conclusione dell'opera al Borromeo e, pochi giorni dopo, precisamente il 13 dicembre, scriveva agli Oblati di S. Ambrogio, i principali destinatari dell'opera, per inviargli una copia manoscritta del *De oratione*. L'opera non giunse mai agli onori delle stampe, ma riveste un particolare interesse in quanto permette di conoscere il rapporto con la meditazione e la preghiera di due grandi prelati, come Carlo Borromeo e Agostino Valier, scoprendo una forte impronta ignaziana nella loro spiritualità. Dell'opera, attualmente, è disponibile un'edizione moderna curata da Carlo Marcora: Carlo Borromeo, *Ordo tractationis De oratione*, Milano, Gentrino Italiana, 1968. L'edizione propone una riproduzione fototipica delle tavole sinottiche del *De oratione*, presenti nel manoscritto della

concluso in tempi molto rapidi, tanto da raggiungere i diretti destinatari, gli Oblati di S. Ambrogio, già nel dicembre del 1583, Carlo Borromeo era riuscito a vedere la conclusione, non fu così per l'impresa ben più antica e impegnativa dell'*Omiliario*, che fu trascinata avanti anche dopo la sua morte, avvenuta il 3 novembre 1584, arrivando nelle mani del giovane card. Federico Borromeo in un manoscritto, attualmente conservato presso la Biblioteca Ambrosiana, a lui dedicato e intitolato *Homiliae in Evangelia secundum ritum Ambrosianum*¹⁰¹.

Nonostante il lungo e meticoloso lavoro di lima al quale fu sottoposto, l'*Omiliario* del Valier per la Chiesa ambrosiana non fu mai dato alle stampe, non sappiamo se perché non si riuscì a giungere a una versione finale pienamente soddisfacente sia per il committente che per l'autore, oppure perché, più semplicemente, nel frattempo era venuto meno l'interesse per la sua pubblicazione, visto che nel 1583 dalla tipografia del da Ponzio era uscito, con tanto di dedica a Carlo Borromeo, il volume *Omelie per tutto l'anno divise in tre parti* del frate carmelitano Angelo Castiglioni¹⁰². Va detto, però, che l'esemplare manoscritto dell'*Omiliario* valeriano è introdotto da una prefazione firmata da Silvio Antoniano, che lascia presupporre una qualche prospettiva di stampa dell'opera patrocinata dal secondo Borromeo. Al di là delle travagliate vicende di composizione e della sua mancata pubblicazione, l'*Omiliario* è in primo luogo un documento di straordinario interesse, che dice molto sullo stile oratorio gradito al Borromeo e adottato dal Valier. Verso questa prospettiva siamo guidati dalla stessa prefazione di Silvio Antoniano, il quale, ribaltando completamente il giudizio espresso a suo tempo rispetto alla veste linguistica delle omelie del Valier, le celebrava come modelli eccellenti di oratoria sacra, rivolgendo a Federico Borromeo la seguente invocazione:

Agnosces autem solidam illam christianam eloquentiam, ex divinae Scripturae et patrum thesauris depromptam, pastorali ac paterna gravitate et charitate dignam, non fuco, et calamistris, sed optimis sententijs, et gravissimis verbis ornatam, quae utilia et salutaria, breviter, dilucide, distincte docet, ea est enim dicendi forma et ratio, ut delectationi quantum satis est, utilitati quam maxime consulatur, non ut ex inani verborum strepitu plausu excitato, Crux Christi quodammodo evacuetur, sed ut audientes ad vitiorum odium contorqueantur, et ad virtutis amorem alliciantur, acresque penitentiae aculei, in eorum animis relinquantur¹⁰³.

Biblioteca Ambrosiana F. 204 inf., seguita dalla parafrasi delle tavole, tratta dal manoscritto dell'Ambrosiana D. 259 inf. Nell'introduzione (pp. XI-XXII) all'edizione è proposta una ricostruzione delle principali fasi di stesura del *De oratione*.

¹⁰¹ Agostino Valier, *Homiliae in Evangelia secundum ritum ambrosianum*, BAM, G. 92 inf.

¹⁰² Carlo Marcora fa notare che Angelo Castiglioni era lo zio di Francesco Adorno e che fu proprio quest'ultimo a segnalare l'*omiliario* del Castiglioni al Borromeo, convincendolo a partecipare alle spese di pubblicazione dell'opera, che riuscì molto gradita all'arcivescovo. Marcora, *Introduzione*, cit., p. 14.

¹⁰³ Valier, *Homiliae*, cit., c. 6r. La prefazione dell'Antoniano fu scritta nel 1588, in quanto egli si rivolge a Federico Borromeo attribuendogli il titolo di cardinale diacono di Santa Maria in Domnica, titolo che il secondo Borromeo ricevette l'anno successivo a quello dell'elevazione

Proprio in questo stile scrittorio breve, concettoso e scevro da virtuosismi stilistici, descritto dall'Antoniano, risiedeva l'elemento di maggior pregio dell'*Omiliario* e, non è da escludere, che la versione finale presentata dall'ecclesiastico romano non fosse frutto anche di un suo intervento diretto, seguito alle osservazioni che aveva mosso nella fase di revisione dell'opera. Ciò che di certo possiamo osservare, è che le 103 omelie raccolte nel volume sono organizzate secondo il calendario liturgico ambrosiano e sono scritte, come è stato notato, «in un latino molto semplice, facile da comprendere ed eventualmente da tradurre in volgare», in piena rispondenza con le disposizioni stabilite nei sinodi diocesani milanesi in materia di predicazione e con le indicazioni fornite dallo stesso Valier nel *De Rhetorica ecclesiastica*¹⁰⁴. Ogni aspetto dell'*Omiliario* appare studiato per adempiere all'esigenza prima per la quale era stato commissionato, ovvero quella di offrire al clero secolare dei modelli di prediche semplici nella forma, ma ricchi nei contenuti, che risultassero facili da replicare anche al più modesto dei parroci. L'opera appare come il distillato più puro della retorica ecclesiastica teorizzata e praticata da Carlo Borromeo e dagli esponenti del cosiddetto 'circolo borromaico', Agostino Valier in testa. A questo riguardo, infatti, ci sembra di poter concordare con Oliver Logan, il quale non solo ha giustamente evidenziato come «in the Italy of our period, bishops, other than Mendicants with a reputation as orators, seldom published sermons, while model homilies were virtually unknown», ma ha anche avanzato l'ipotesi per cui nell'*Omiliario* furono accolti «substantially Valier's own sermons which he has delivered personally»¹⁰⁵.

Le omelie del vescovo di Verona muovono da passi del Vangelo, o meglio, come ricorda l'Antoniano nella prefazione, considerano «omnes illas Evangelij partes, quae in Ecclesia Mediolanensi ritu Ambrosiano recitari solent, singulis Dominicis, festisque sanctorum, et solemnibus diebus»¹⁰⁶. Sono sviluppate con uno stile familiare, anzi sono impostate secondo quella che lo stesso Valier nell'omelia XXXVIII definisce come «paterna forma loquendi»¹⁰⁷, della quale troviamo un'efficace definizione nell'omelia XLV: «A subtilibus quaestionibus abstineo fratres, animarum tantum saluti consulo, meliores non doctiores vos efficere studi, magistros plurimos sacrarum litterarum, egregios concionatores habetis, paterne ipse vobiscum ago, praecepta salutaria in medium afferro, dilucide admodum, et breviter vobis propono»¹⁰⁸. In questa direzione, si può affermare che ciascuna delle omelie raccolte nel manoscritto ambrosiano

al cardinalato, più precisamente il 15 gennaio 1588, per poi passare nel gennaio 1589 al titolo dei Santi Cosma e Damiano. *Hierarchia Catholica Medii aevi sive summorum pontificum, S.R.E. cardinalium, ecclesiarum antistitum series*, 9 voll., Patavii, Il messaggero di s. Antonio, 1898-2001, Vol. III, pp. 52, 74.

¹⁰⁴ Giuliani, *Il vescovo filosofo*, cit., p. 133.

¹⁰⁵ Logan, *The Venetian upper clergy*, cit., pp. 277-278.

¹⁰⁶ Valier, *Homiliae*, cit., c. 5v.

¹⁰⁷ *Ibid.*, c. 129r.

¹⁰⁸ *Ibid.*, cc. 152r-152v.

appare perfettamente aderente a quel modello oratorio illustrato dal Valier nel *De Rhetorica ecclesiastica*, che proprio nella definizione di homilia trovava la sua espressione più compiuta:

[Homilia] est colloquium: eo nomine appellati sunt sermones episcoporum, ac sacerdotum ad populum; quia ut inter patrem, et filium, ita inter sacerdotem, et populum haberi debet sermo; et in illis sermonibus quaedam simplicitas, et familiaritas a charitate profecta, debet apparere; quae familiaritas cognoscitur, cum sic videntur scriptae homiliae, ac si in magna quadam domo, paterfamilias, ad familiam admonendam assurgeret; nec ii, a quibus habebantur, longa utebantur oratione; cum mos dividendi sermones in duas, aut tres partes, apud veteres (quod sciamus) non fuerit receptus¹⁰⁹.

Solo di rado si ricorre alle allegorie, più spesso si propone un'interpretazione storica della Scrittura, mettendo in guardia dalle predizioni, specie da quelle pronunciate dagli eretici, oggetto specifico di condanna nelle omelie I e XLVIII. In particolare, in quest'ultima il Valier propone un vero e proprio identikit del falso profeta, fornendo indicazioni e consigli su come riconoscerlo ed evitarlo:

Monemus sacra evangelica lectione, ut attendamus nobis a falsis Prophetis, qui veniunt in vestimentis ovium, intrinseci sunt lupi rapaces: vos cupitis scire, qui sint huiusmodi falsi prophetae, in universum falsi Prophetae nuncupandi sunt illi, qui falsa docentes, totum orbem corrumpere sunt conati, quorum in numero ponendi sunt, impiarum superstitionum magistri, et perversi homines heresiarchae, ut Maumethus, Arrius, Lutherus, et huiusmodi portenta hominum. Hi, in vestimentis ovium, humilitate, mansuetudinem fingentes, seque eam Deo colloquia habere simulantes, popularem auram affectantes, et propria comoda quaerentes, orbem universum infecerunt¹¹⁰.

Di contro nella stessa omelia sono indicati due precisi criteri per individuare le vere e buone prediche cristiane: la frugalitas e la brevitatis. In merito al primo elemento, ad esempio, leggiamo:

Num quid melior evasi! Aliquid omnino memoriae commendent ex iis, quas excipit sententiis, frugalitatem etiam in concionibus admittant, delitias non tanti faciant, non admirentur, ut in extremo illo die Juditij non puniantur, quod nimium superbum aurium suarum fuerint indicium, quod nisi lenocinijs corruptam verbum audire nequiverint, quoniam vero et nos sacerdotes, nosque parochi, episcopique etiam ipsi lenones sumus, infirmitatibus et ipsis nos circumdati varijs, praecibus vestris nos adjuvate, fratres, si vos non pascimus, ea, qua deberemus diligentia, orate Dominum, ut in horrendas illas impraecationes, quas per servos suos, Prophetas fieri iurat, non incidamus¹¹¹.

Nel chiarire le caratteristiche che deve avere una concione sacra per essere efficace e rispondere al suo obiettivo primo, ovvero quello di nutrire i fedeli con la parola di Dio, il Valier entrava anche nel vivo della trattazione dei compiti

¹⁰⁹ Valier, *De Rhetorica*, cit., lib. III, p. 229.

¹¹⁰ Id., *Homiliae*, cit., cc. 162r-162v.

¹¹¹ *Ibid.*, c. 163r.

specifici del clero in cura d'anime rispetto al *munus praedicandi*. Le digressioni su questo tema ritornano con frequenza, per ribadire e precisare aspetti inerenti la forma e le funzioni dell'attività di predicazione sacerdotale, di cui le omelie raccolte nell'opera rappresentavano una concreta esemplificazione, che tuttavia andava presentata e spiegata nei suoi aspetti fondamentali. A questo riguardo, è interessante l'esortazione proposta ai sacerdoti in esordio all'omelia XIII, per cui si avvertiva: «libenter, ut scitis, brevitati consulo, non multa, sed necessaria salutis vostra, non recondita, sed utilia consuevi vobis in medium afferre: lacte libentius, quam solido cibo vos pascere»¹¹². Le indicazioni del Valier servivano ad indirizzare i sacerdoti verso una predicazione schietta e popolare, che fosse in grado di parlare alla moltitudine, in quanto, come avvertiva subito di seguito, l'uditorio dai gusti più ricercati e avvezzo alle raffinatezze dell'alta eloquenza sacra poteva giovare di altri canali, per cui ricordava: «habetis in ecclesia cathedrali, habetis in religiosorum monasterijs, a quibus sacris in literis nobilissimas conciones singulis diebus festis audiatis»¹¹³.

Dagli aspetti fin qui sottolineati emerge come l'*Omiliario* valeriano sia molto di più di un semplice 'catalogo di prediche' pronte all'uso, le finalità pedagogiche che lo animano sono di gran lunga più complesse e profonde di quanto non possa apparire di primo acchito. Ogni singola omelia, infatti, si proponeva non solo come un modello da seguire o da riproporre nell'immediato, ma anche come un'occasione di riflessione sulle modalità e sulle ragioni per le quali ciascun sacerdote era chiamato ad esercitare il ministero della parola. Le due prospettive appaiono perfettamente intrecciate e permettono di 'amplificare' il valore educativo dell'opera nel suo complesso, proprio perché le regole, i consigli e gli avvertimenti proposti di volta in volta, trovavano una loro traduzione concreta nello svolgimento stesso dell'omelia, in una commistione continua tra 'teoria e pratica', congeniata proprio per permettere al sacerdote di acquisire familiarità con gli 'strumenti del mestiere' e, nel contempo, di sviluppare consapevolezza rispetto al suo ruolo, mettendolo nelle condizioni di svolgere un'attività di predicazione corretta ed efficace.

Nell'*Omiliario* ricorrono alcune tematiche chiave, come quella della fuga dalle vanità e dagli inganni del mondo, che è uno degli argomenti dominanti delle omelie II, XXXII, XXXIII, XLII, XLVI, LXXXI, LXXXVII. Anche la tesi delle disgrazie e delle calamità come segni dell'ira divina, ritorna con insistenza ed è sviluppata in particolare nelle omelie II, IV, VII, XXVIII, XXXV. Altrettanto rilevante è il tema del desiderio delle lacrime come strumento di purificazione dell'anima, che viene trattato con specifica attenzione nelle omelie IX, XVIII, XXIV, XXV, XXXIII, XLVI, LIX. Molte omelie, naturalmente, sono incentrate sul binomio cardine *virtutes vs peccata*, che costituisce il cuore delle *Instructiones praedicationis verbi Dei* del Borromeo e che nell'*Omiliario* valeriano viene

¹¹² *Ibid.*, c. 58r.

¹¹³ *Ibid.*

affrontato secondo due principali direttrici, per cui o si propongono modelli da emulare, individuati a partire dall'episodio evangelico commentato, oppure si entra nella trattazione degli aspetti che attengono alla quotidianità della vita cristiana, parlando delle *pravae consuetudines* da evitare e/o presentando le buone opere e le pratiche religiose da coltivare. Così, ad esempio, se nell'omelia XVIII (*Dominica in Paschate Ioanni*, 20) Maria Maddalena è indicata come modello di redenzione per tutte le peccatrici, nell'omelia LXXXVIII (*In coceptione Beatae Virginis*) la vergine Maria è proposta come paradigma di perfezione per le vergini, le spose, le madri e le vedove; e ancora, se l'omelia XV (*Dominica in palmis*) e l'omelia XXVII (*Dominica post Ascensionem*) consentono di introdurre il tema della preghiera come strumento per combattere i peccati ed elevare l'animo alla contemplazione della patria celeste, l'omelia LXIX (*In festo Corporis Christi*) diviene l'occasione perfetta per compiere quello che nelle *Instructiones* borromeiche è indicato come l'«*officium in instituendis fidelibus ad sanctissimum sacramentorum usum*»¹¹⁴, mentre l'omelia LXXX (*In festo Omnium sanctorum*) offre l'opportunità di proporre una sorta di compendio di tutte le regole utili per condurre una retta vita cristiana.

Al centro dell'*Omiliario*, tuttavia, campeggia al di sopra di ogni altra la figura Gesù, che costituisce il punto focale dell'intera opera; se si eccettuano le omelie dedicate alla celebrazione delle feste dei santi, che hanno una loro specificità, infatti, l'intera raccolta di omelie si propone come un unico grande racconto degli episodi della vita e degli insegnamenti del Figlio di Dio, scandito secondo i tempi del calendario liturgico ambrosiano. All'interno di questa lunga narrazione viene dato un particolare risalto all'immagine di Gesù come salvatore e redentore dell'umanità, secondo una chiave interpretativa molto cara al Borromeo, culminante nell'identificazione del fedele con il Cristo crocifisso e sviluppata in special modo nelle omelie del tempo di Quaresima e di Pasqua¹¹⁵. A questa immagine si affianca quella del Cristo maestro e modello di vita cristiana, che trova una sintesi efficace nell'omelia XXIX, laddove nel definire il significato dell'essere cristiani si afferma:

Multi dicunt, fratres, Christianus sum, in Christum credo, fidei articulos duodecim firmiter credo, sanctas traditiones ecclesiae amplector, haereses magis odi, quam pestem, quid prohibet cur coelestem, et beatam vitam sit consecuturus, non consequeris, frater vitam aeternam, nisi operibus fidem tuam comprobaveris, et demones crediderunt, ob eorum autem superbiam praecipitati sunt. Finis praecepti est dilectio, virtutum omnium forma est charitas is vere christianus est nominandus, qui diligit Deum, et servat sermones eius, summa

¹¹⁴ Borromeo, *Instructiones praedicationis verbi Dei*, cit., cc. 218r-220r.

¹¹⁵ Sul ruolo della devozione della croce in Carlo Borromeo si veda F. Buzzi, *Il tema della croce nella spiritualità di Carlo Borromeo. Rivisitazione teologica e confronto con la prospettiva luterana*, in Buzzi, Zardin (edd.), *Carlo Borromeo e l'opera della «grande riforma»*, cit., pp. 47-58. Per una messa a fuoco dei motivi portanti della visione cristologica post-tridentina si rimanda alle riflessioni di Buzzi, *La «scolastica barocca» come risposta alla riforma e ai tempi nuovi*, cit., Vol. I, in partic. pp. 89-93, 95-95.

sermonum Christi, et plenitudo est haec ipsa, quam commemoravi, charitas, perpetuo exemplo vitae effusione preciosissimi eius sanguinis nobis commendata. Iam docuit verus magister quale sit indicium veri amoris in Deum, et discipulos, et omnes, qui discipuli successerunt episcopos, nos et Parochos, consolatur et eosdem discipulos, consolatur et nos christianos, cum sit pollicitus, quid deinde praestit se alium paraclitum missurum, alium consolatorem, alium patronum hic est S.tus Spiritus, qui eiusdem disciplinae magister est, cuius fuerat Christus, dum in hoc saeculo nobiscum pro sua misericordia degeret, magister humilitatis, mansuetudinis, et charitatis, quam christianus docuit, suasor pacis, et omnium virtutum, ut suasor perpetuus fuit Christus¹¹⁶.

L'essenza e la perfezione della vita cristiana, dunque, non andavano cercate negli elementi esteriori della fede, ma nell'adesione profonda agli insegnamenti del Figlio di Dio, esempio per eccellenza al quale ogni fedele doveva guardare, per assottigliare le distanze e cancellare le discrepanze tra condotta esterna e virtù interne. Farsi quanto più possibile simili a Cristo, questo è il messaggio chiave che attraversa tutto l'*Omiliario* e in esso è racchiuso il senso più profondo di quel «docendi munus» al quale, con ancora più enfasi, era richiamato il clero in cura d'anime nelle quattro omelie finali dell'opera, come per ribadire le finalità dalle quali aveva preso le mosse il progetto stesso dell'*Omiliario*¹¹⁷. Imperniate sul commento di tre versetti molto cari al Borromeo, tratti dal capitolo 5 del Vangelo secondo Matteo, rispettivamente «Vos estis sal terrae» (Mt 5, 13), «Vos estis lux mundi» (Mt 5, 14) e «Sic Luceat lux vestra» (Mt 5, 16)¹¹⁸, le quattro omelie di chiusura enfatizzavano la funzione esiziale dei sacerdoti come pastori del popolo cristiano, ribadendo il ruolo fondamentale che, tra i numerosi «condimenta» spirituali a loro disposizione, andava assegnato al ministero della parola ai fini della conversione interiore dei fedeli e della diffusione della dottrina cattolica romana¹¹⁹. Così se nell'omelia I, muovendo da un altro passo del Vangelo di Matteo, il capitolo 24, il Valier aveva messo in guardia dai falsi profeti, sottolineando la pericolosità della predicazione eretica, nella chiusura dell'*Omiliario* riaffermava la centralità di questo strumento pastorale nella vita della Chiesa cattolica, ribadendo la necessità di un potenziamento della predicazione ordinaria svolta dai sacerdoti in cura d'anime, quale veicolo primo di salute e salvezza di tutti i cristiani.

¹¹⁶ Valier, *Homiliae*, cit., cc. 100v-101r.

¹¹⁷ L'espressione «docendi munus» è utilizzata nella penultima omelia, *ibid.*, c. 360r.

¹¹⁸ Sul significato attribuito dal Borromeo a questi versetti neotestamentari si rimanda a M. Marcocchi, *L'immagine della chiesa in Carlo Borromeo*, in Buzzi, Zardin (edd.), *Carlo Borromeo e l'opera della «grande riforma»*, cit., pp. 25-27.

¹¹⁹ Si ricorre al termine «condimenta», in special modo, nelle omelie C e CI, applicandolo all'interpretazione del versetto «Vos estis sal terrae». Valier, *Homiliae*, cit., cc. 350r-353v, 354r-357r.

Conclusioni

Gaudete vos fratres, talem nancti Pastorem, qui in hoc potissimum muneri suo minime deest, utpote praecipuo; nam et Apostoli, huius rei non ignari, verbi praedicationi ut facilius incumberent, Diaconos elegerunt, quibus alia munera reliquerunt; quo sit, ut nulla sit excusatione dignus Pastor, qui, quia coadiutores habet, praedicare recusat. Hinc infertur, fratres, quod ad vos potissimum spectat, vestrum scilicet esse, Pastores diligenter audire, eorum praedicationibus interesse, correlativa sunt enim Praelatus, et populus, Pastor, et grex. Habent Pastoris verba multo maiorem, quam Concionatorum aliorum vim, ut enim Matris lac magis, quam exterae foeminae, nutrit infantem; sic et proprii Pastoris vox est attentius excipienda, quam aliorum, utpote utilior, nam etsi multos habeatis paedagogos, non tamen multos patres¹²⁰.

Con queste parole Carlo Borromeo, in un passaggio dell'omelia tenuta nella cattedrale di Verona in occasione della solennità dell'Ascensione del 19 maggio 1583, elogiava l'impegno con il quale Agostino Valier aveva atteso al ministero della predicazione nella sua diocesi. Attraverso due paragoni mutuati dal mondo degli affetti familiari, l'uno relativo alle proprietà nutritive del latte materno e l'altro alla funzione educativa precipua del padre, il Borromeo ribadiva il primato in termini di efficacia pastorale della predicazione del vescovo (e del clero diocesano per riflesso), rispetto a quella tenuta da altri 'pedagoghi', con riferimento neanche tanto implicito – in questo caso – ai predicatori degli ordini religiosi.

Le stesse immagini evocate dall'arcivescovo di Milano nell'omelia rivolta al popolo veronese le ritroviamo, non a caso, in un libello manoscritto del Valier composto nel 1578 e dedicato a colui che aveva seguito da vicino le fasi di elaborazione e di revisione del *De Rethorica ecclesiastica* e dell'*Omiliario* ambrosiano, Francesco Adorno. Si fa riferimento al *De episcopali forma concionandi*, uno scritto destinato a circolare all'interno della cerchia degli amici più intimi del Valier e nato dal desiderio del vescovo di Verona di condividere con poche e fidate persone care le riflessioni che nel corso dei suoi primi anni di episcopato era venuto maturando in merito ai doveri del vescovo rispetto al ministero della parola¹²¹. Le metafore presenti nell'omelia borromaica le ritroviamo proprio in

¹²⁰ Carlo Borromeo, *Homiliae nunc primum e Mss. codicibus bibliothecae Ambrosianae in lucem productae Joseph Antonii Saxii praefatione, et annotationibus illustratae*, 5 voll., Mediolani, ex Tipographia Bibliothecae Ambrosianae, apud Joseph Marellum, 1747-1748, Vol. I, Hom. XII, p. 92.

¹²¹ Del libello si conservano tre copie manoscritte presso la Biblioteca Ambrosiana. Due all'interno del manoscritto D. 232 inf., cc. 23r-37v, cc. 39r-51r, recanti il titolo *De episcopali concionandi forma ad Franciscum Adornum Societatis Iesus*. Questo manoscritto raccoglie altre due opere sul tema della predicazione, entrambe di Benedetto Palmio (*De excellentia praedicationis evangelij Benedicti Palmij Soc. Jesu cui auctoris nomen appositum est in ultima pagina manu B. Caroli*, cc. 3r-15v; *Eiusdem Benedicti De doctrina. Et exhortatione simul coniungenda, cuius inscriptio in parte extima ultima pagina est Sylvij Antoniani qui tunc erat a secretis B. Caroli*, cc. 16r-21v). Una terza copia del libello valeriano è presente all'interno del manoscritto D. 439 inf., con il titolo *Numquid Episcopi sit concionandum, et quaternus, ad Patrem Franciscum Adornum Societatis Jesu, Libellus quo eius iudicium ea de re exquiritur*. Il manoscritto contiene altri tre opuscoli del Valier (*De Cardinali, Carlo amplissimo cardinali Sanctae Praxedis*, cc. 10r-23r;

un passo centrale del *De episcopali forma concionandi*, nel quale descrivendo le caratteristiche salienti della predicazione vescovile il Valier afferma:

Habere populos multos pedagogos, sed non multos patres, patres esse Episcopos, paternum eorum concionandi modum, et multum prodesse populo: ut lacte matris, etsi imbecillior foemina est, melius aluntur filij, quam lacte nutricis, ita concionibus episcoporum magis nutriri, quam aliorum concionatorum, quamvis eloquentia prestant¹²².

Dai passi appena richiamati emerge come sia il Valier che il Borromeo guardarono a un tipo di predicazione dal registro familiare e di taglio essenzialmente catechetico, lontana dalle ricercatezze e dai tecnicismi retorici ostentati nelle prediche di molti religiosi; una predicazione che non aspirava ad addentrarsi nella trattazione di complessi temi di natura teologica, ma che al contrario mirava principalmente a far leva sui sentimenti dei fedeli, suscitando in loro contrizione per i peccati e desiderio di redenzione. Lungo queste direttrici, come si è visto, furono modulate le pagine del *De Rethorica ecclesiastica* e quelle delle omelie per la Chiesa ambrosiana, e a queste entrambi i pastori si attennero nell'attività di predicazione personalmente condotta e incoraggiata all'interno delle loro diocesi, quale espressione di quello che il Tridentino aveva indicato come il *praecipuum munus* del vescovo e del clero in cura d'anime. In questa cornice appare evidente come le due opere scritte da Agostino Valier su istanza di Carlo Borromeo, di cui il presente articolo ha ripercorso le fasi di elaborazione e preso in esame contenuti e finalità, costituiscono una delle testimonianze più esplicite e significative di quel progetto di formazione al ministero della parola promosso all'indomani del Concilio, che vide impegnati in prima linea alcuni dei maggiori vescovi riformatori del tempo, con l'intento di radicare, in particolare presso il clero in cura d'anime, quell'eloquenza del cuore che richiedeva di essere comunicata innanzitutto con l'integrità e la coerenza della condotta di vita dell'oratore¹²³, e che imponeva una netta supremazia del *pathos* sul *logos*, quale condizione imprescindibile per *move-re* i fedeli verso un'autentica ed duratura conversione dei cuori.

De occupationibus S.R.E. diacono cardinali dignis ad Federicum Cardinalem Borromeum, cc. 26r-44v; *Quatenus cum iis, qui a Sanctae Matris Ecclesiae Eremio recesserunt, sit versandum, ad Nicolaum Tomiscum Polonum*, cc. 46r-62v). La seconda copia del manoscritto D. 232 inf. e quella presente nel manoscritto D. 439 inf. rivelano le stesse piccole varianti di carattere formale rispetto alla prima copia del manoscritto D. 232 inf., dalla quale si cita. La data del libello si desume da un riferimento interno al testo, nel quale il Valier dice espressamente di essere da tredici anni alla guida della diocesi di Verona («tredicim ferme annos, quibus huic ecclesiae praesum», c. 27v).

¹²² Valier, *De episcopali forma concionandi*, cit., c. 25r.

¹²³ Al tema il Borromeo aveva riservato un intero paragrafo delle sue *Instructiones praedicationis verbi Dei*, intitolato per l'appunto *De disciplina virtutum, et vitae innocentia concionatoris*, che ruotava attorno ad un assunto principale: «Erit igitur concionator singulari vitae innocentia, moribus sanctissimis, et divinis virtutibus instructus» (c. 213v). I riflessi di questo approccio all'interno del circolo borromaico sono stati analizzati in S. Giombi, *Sacra eloquenza: percorsi di studio e pratiche di lettura*, in E. Barbieri, D. Zardin (edd.), *Libri, biblioteche e cultura nell'Italia del Cinque e Seicento*, Milano, Vita e Pensiero, 2002, pp. 137-143.

At the cutting edge of education: learning to teach and teaching to learn

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ABSTRACT: Our aim is to study the figure of Regina Lago García, innovative teacher and outstanding intellectual, who, following the Spanish Civil War, was forced to live in exile. Pedagogical perfection was the objective she strived to achieve, continuing and completing her training abroad. She was well educated for women of that period, and was very aware of gender inequality. She became one of the most distinguished teachers in the history of Spanish Teacher Training Colleges, where she incorporated new methodologies into the initial training of teachers. She contributed to our knowledge society with a significant number of written works on new educational approaches. Committed to her democratic ideals, she provided assistance to children and adults during the Spanish military rebellion and subsequent civil war; she finally had to abandon Spain to avoid being punished. She took refuge in Paris and from there set off for Mexico. Despite being uprooted she continued with her political activities linked to Spain and her professional development. A life full of meaning, an innovative woman who never gave up teaching or researching, even on her new continent, motivated by an indelible dream of returning to her homeland.

EET/TEE KEYWORDS: Education; Teacher Education; Educational Reform; Spain; XIX-XX Centuries.

Introduction

Spain did not sit on the side-lines regarding pedagogical renovation and new technologies. Certain sectors of Spanish society paid great attention to scientific pedagogical developments and international advances. Between the 19th and 20th centuries, they were receptive to new ideas on education that were circulating in Europe and America. In the final decades of the 19th century, several unique figures stood out in connection with the active pedagogy favoured by the *Institución Libre de Enseñanza* (Institute of Free Teaching), workers'

movements, religious schools and regenerationists. Modernizing approaches were disseminated through publications and courses for teachers and scientists. In a similar fashion to international pedagogical practice, academics generated a series of ideas and knowledge that were then applied in training centres.

The creation of the Ministry of Public Instruction and Fine Arts in 1900 was key to this renovation in education policies. From the beginning of the 20th century, the Spanish cultural scene was transformed and illiteracy statistics began to decline steadily. The middle class was the protagonist of these intellectual movements, in contrast to the poor results of educational policies among the ordinary class. The need to modernize the nation and its education system explained the creation of institutions that provided contact with a range of professionals from other countries. *The Junta de Ampliación de Estudios* (Council for the Extension of Studies), created in 1907, had a marked influence on different fields of study. It encouraged the Europeanization and regeneration of Spanish teaching practices through a series of grants for teachers to study abroad. Many intellectuals took advantage of these grants to make contact with modernizing trends, and on their return disseminated them in a Spanish education system eager for progress and renovation. Progressive and innovative people of the time set off for Europe to make contact with pedagogical and professional institutions that were promoting a new school culture. Switzerland, Italy, Belgium, England and France were some of the destinations that these intellectuals were attracted to for their scientific pedagogical advances. They underwent training courses and visited new schools, training colleges, boarding and farm schools. The incorporation of these diverse pedagogical movements together with the intellectual spirit that culminated the Spanish Second Republic led to a period that deserves the title of the *Golden Age of Spanish Pedagogy*.

It is important to mention that at the beginning of the 20th century, Spanish women at last burst onto the scientific stage. These pioneers, with a higher than average level of education, broke the traditional culture of feminine invisibility. Some joined professional unions, although the most common route was via various women's associations that existed at that time. Thus, the second and third decades of the last century were dazzled by a generation of female scientists: female university professors, female school teachers, female primary school inspectors, female doctors, among others, stamped their footprint on a range of academic areas. An interesting group of these women widened their training abroad through grants and subsidies from the Council for Extension of Studies with the aim of improving research in a range of academic disciplines. However, the destinies of these Spanish women were frustrated by the Spanish Civil War and subsequent dictatorship. The impact of the war and the dictatorship on science was brutal, halting progress in its tracks. Following the victory of Franco's army, the purges and persecutions began. The majority of defeated intellectuals that had the chance to escape from an authoritarian Spain chose exile. The adverse panorama blocked their horizons after the great

expansion during the Second Republic. Marginalized, repressed and without prospects, exile was the only viable alternative.

At an international level the contribution of Spanish exiles to the scientific, artistic and intellectual life of their adopted countries has long been recognized. They had a difficult time to continue beating the drum for knowledge and maintaining a space for science. An illustrious group of intelligent women exiles had to bear the separation from family and colleagues. In this group was the teacher Regina Lago García. With this forced exit, Spain lost a good number of its intellectuals and scientists, an outstanding group that provided great benefits for other countries. We propose to study our subject from the perspective of micro-history. We aim to investigate the figure of Regina Lago García, a distinguished intellectual, in tune with the currents of the *Escuela Nueva* (New School), who following the Civil War (1936-1939) was forced into exile. With strong ties to Spain, Regina's stay in Mexico did not distance her from her concerns about pedagogy, despite not being able to return to Spain until 1963. Even in different surroundings, she still shared the same political, social and educational worries as before. In spite of her nostalgia for her mother country, she continued with her educational work. At the same time, she carried out a range of activities to support her lost patria in the hope of achieving democracy and freedom. She left behind a series of very interesting written works, recognized at the time, but in many cases lost during the Civil War, out of print or difficult to access. To carry out our research, we combined primary and secondary sources to make a historical analysis using various Spanish and Mexican archives and libraries¹. However, our research has been hampered by difficulties in recovering information, so reconstructing Regina Lago's biography has not been an easy task. Many of the documents are widely dispersed and in addition, it has been complicated to locate her written works published in Spain and her places of exile².

¹ R. Lago, *La Guerra a través de los Dibujos Infantiles*, «Revista Educación y Cultura», August 1940, pp. 422-437; *Cómo se mide la inteligencia infantil*, México, Editorial IDIAPSA, 1940; *Análisis objetivo de la escritura infantil*, «Revista de Pedagogía», n. 8, 1929, pp. 540-545; *Las Repúblicas Juveniles*, Madrid, Publicaciones de la Revista de Pedagogía, 1931; *Las pruebas mentales y de instrucción*, «Revista de Pedagogía», n. 12, 1933, pp. 493-497; *Escuela y sociedad*, «Revista de Pedagogía», n. 13, 1934, pp. 408-413.

² Historical Archive of the National Institute of Anthropology, Mexico; Archives of the Technical Committee to Aid Spanish Republicans (CTARE), File 4565; Archive About the University Studies (CESU), National Autonomous University of Mexico, Record LAGR-000907. 112/131/5756, Typed report on Regina Lago's work situation (1965); Archives of the Superior Normal School, Pachuca (Mexico), Record Books.

1. *Some biographical data*

Regina Lago Garcia was born in Palencia (Spain) in 1897 and died in Cuernavaca (Mexico) in 1966³. She studied teaching at the Palencia Teacher Training College, where she qualified as an elementary and high school teacher⁴. Like several of her colleagues, after finishing her studies, she decided to continue with her training. Thus, she moved to Madrid, staying at the *Residencia de Señoritas* (Young Ladies' Hall of Residence), and studied at *Escuela de Estudios Superiores del Magisterio* (Higher Education Teacher Training College)⁵. In this college, she qualified top of her class, the tenth class to graduate in Science (1918-1921); she also received the Pablo Pérez Seoane⁶ prize awarded by the teaching staff. The qualification she obtained allowed her to teach in *Escuelas Normales* (Teacher Training Colleges). Later, she did a course in Experimental Psychology, taught by the prestigious German psychiatrist and psychologist Theodor Ziehen (1862-1950), at the Central University of Madrid in 1924. This demonstrated her great interest in psychology at a time when women were in the minority in this subject: on this particular course, there were only three women among a considerable number of men. The ideas of Professor Ziehen had been disseminated in Spain as part of the field of psycho-pedagogy since the end the 19th century. His popularity was shown by the widespread presence of his works, as well as by the courses he gave, and his impact on professionals like Regina Lago⁷.

Professional institutions were the focus of the pedagogical renovation and Regina quickly become involved in them after her studies in the Higher Education Teacher Training College. Access to bibliography and new methodologies created just the right atmosphere to spark her interest in teaching and educational innovations. She adopted a positive attitude about the importance of pedagogy and psychology in teacher training, especially in the initial stages of training for teachers.

As for her private life, we know she married Juan Comas Camps (1900-1979) from Menorca. The couple met in Madrid, when both were students of the

³ C. García Colmenares, *Las primeras psicólogas españolas becadas por la Junta de Ampliación de Estudios e Investigaciones Científicas*, «Revista de Historia de la Psicología», vol. 29, n. 3-4, 2008, p. 71; C. García Colmenares, *Regina Lago (1896-1966)*, in P. Alcalá Cortijo *et al.* (edd.), *Ni tontas, ni locas*, Madrid, FECYT, 2009, pp. 197-200.

⁴ General Administration Archive, Spain (AGA), File 70, Box 32/14712 and Legajo 7483/70.

⁵ Cfr. A. Molero Pintado, M.^aM. del Pozo Andrés, *La Escuela de Estudios Superiores del Magisterio (1909-1932)*, Alcalá de Henares, Universidad de Alcalá, 1989; S. Ferrer C. Maura, *Una institución docente española: la Escuela de Estudios Superiores del Magisterio (1909-1932)*, Madrid, [s.n.], 1973. He belonged to the tenth promotion center (1918-1921).

⁶ AGA, Legajo 7483/70. Cfr. J.F. Cerezo Manrique, *La formación de maestros en Castilla y León (1900-1936)*, Salamanca, Ediciones Diputación de Salamanca, 1991, p. 265.

⁷ S. Astudillo, *La influencia de Theodor Ziehen en la Psicopedagogía española*, «Revista de historia de la psicología», vol. 21, 2000, pp. 179-190.

Higher Education Teacher Training College. Later, they were sent to the same destinations to teach. In fact, the couple took the same route around different parts of Spain up till the Second Republic. They lived in Tenerife (1924-1927), Lugo (1927-1932), Palencia (1932), Segovia (1932-1934) and Madrid (1934-1936). Juan Comas worked as a school inspector and area chief inspector in these destinations, whereas Regina Lago was a teacher in the Teacher Training Colleges. Furthermore, they travelled together to Switzerland (1928-1930) to carry out further studies. They also jointly published several works related to educational methodological innovations. They were a «pedagogical couple» full of concerns about the public school system of the time. They were also in tune on their ideas about politics. In 1921, they joined the teachers' branch of the UGT trade union (*Unión General de Trabajadores*) with its socialist ideology⁸.

2. *Teaching professionals in various colleges*

Throughout her professional life, the contact she had with pedagogical renovation and the modern approaches from Europe and America were evident in her everyday work in the classroom. Her training, her thirst for new knowledge and her interest in psychology (a key subject in teacher training) were all present in her practical classroom teaching.

One of her first destinations as a teacher trainer was in the Teacher Training College in La Laguna (Tenerife, Canary Islands), appointed in 1924 as a permanent teacher in mathematics⁹. The following year, she changed her position to specialize in science. On the 30th September 1925, she resigned that position to take up another position in the same centre as a physics, chemistry and natural history teacher¹⁰. Regina moved to Tenerife with her husband Juan Comas. Both were interested in encouraging and improving education and teaching as well as the training of teachers. In Tenerife, as in other destinations previously, Lagos and Comas were in agreement about pedagogical concerns and from their respective positions made every effort towards promoting high quality education. They shared a dream of an education system that would replace the old system with one based on tolerance, innovation, progress and democratic values. Juan Comas became involved in pedagogical renovation (setting up schools, libraries, educational groups, etc.) and, he was particularly

⁸ A. Hernández de León Portilla, *España desde México. Vida y testimonio de transterrados*, Madrid, Edaf, 2004, pp. 195-211.

⁹ Archive from the Teacher Training College in La Laguna (Tenerife), *Minutes of Meetings*, Tomo II (1915-1932); Royal Decree, 21 April 1924.

¹⁰ *Ibid.* Royal Decree, 9 September 1925.

interested in school *mutualidades* (friendly societies). This was an extremely significant and innovative concept of schools, and his success was reflected in the creation of many these school friendly societies in the Canary Islands¹¹.

During her stay on the island, Regina coincided in her school with the teacher María Sánchez Arbós. We know little about her relationship with this other important figure of Spanish pedagogy. In fact, Regina Lago arrived in Tenerife in the final academic year that María Sánchez was teaching in the College in La Laguna. We have evidence that shows both had been enrolled in the Higher Education Teacher Training College¹² in Madrid; Maria had been the eighth class to graduate (1916-1919) and Regina the tenth (1918-1921). Both as students and subsequently as teachers they coincided for one academic year in the same college, they understood each other and were linked professionally and personally¹³. They had kept in touch professionally, especially regarding their shared ideals on educational renovation: they even supported each other in their academic lives. Regina supported Maria by voting in her favour in staff meetings at the centre where they taught¹⁴.

Regina Lago played an active role in the academic life of the college in La Laguna, as she did in all her subsequent posts. She became involved in all aspects of the college, in teaching, setting exams, as well as taking part in examining boards and organizing a range of other activities. For example, she was in charge of organizing the Book Festival 1926¹⁵ and was President of the Examining Board for Teachers¹⁶. She was also at various events, such as the

¹¹ Circular by Juan Comas Camps, Official Bulletin of the Province Canary, Santa Cruz de Tenerife, 21 September, 1925. At the end of 1924-25 academic year; there was a *mutuality* (friendly society schools) on the islands of Tenerife, La Palma, La Gomera and El Hierro, i.e. in the western sector of the archipelago. However, his insistence and campaign in favor of these schools, with their advantages often being reported in the press, led to a significant increase. There were 119 new friendly society schools by 8 March 1926.

¹² A. Viñao Frago, *Reformas e innovaciones educativas en la España del primer tercio del siglo XX: la JAE como pretexto*, «Revista de Educación», n. 2 (Numero extraordinario), 2007, p. 30.

¹³ T. González Pérez, *Educación y fronteras. María Sánchez Arbós y su lucha por la renovación pedagógica en Canarias (1920-1925)*, «Revista de Educación», n. 356, September-December 2011, p. 433.

¹⁴ ATTCLL (Archive from the Teacher Training College in La Laguna, Tenerife), Minutes of Staff Meetings Minutes Book Cloister Normal School of Teachers Canary, 1918-1927, Staff meeting held on 21st March 1925, p. 168. When there was a proposal to request the Gran Cruz de Alfonso XII (Great Cross) for Cabrera Pinto, Principal of the High School, it was supported by all the teachers except for the teachers Regina Lago and María Sánchez Arbós. In the minutes, it is mentioned that: «the teacher Regina Lago stated that for no particular reason, rather for general motives, she would abstain from the proposed event». See González Pérez, *Educación y fronteras. María Sánchez Arbós y su lucha por la renovación pedagógica en Canarias (1920-1925)*, cit. p. 447.

¹⁵ ATTCLL, Minutes of Staff Meetings, p. 192.

¹⁶ President of the Teachers' Examining Board in the Canary Islands. There are various press releases that make reference to this, «Eco del Magisterio Canario», La Laguna, 22 May 1924; «El Progreso», 2 December 1925; «Gaceta de Tenerife», n. 3 March 1926; «Eco del Magisterio Canario», La Laguna, 30 March 1926.

inauguration of the academic year of the University Section together with the head of the Teacher Training College, High School teachers, Business School and lecturers from the University Section of La Laguna¹⁷.

Neither the geographical distance of the Canary Islands from the European continent nor the difficulties in communication in that period deterred her from interest in pedagogy. She did not lose contact with either the institutions or the people that were promoting a renewed pedagogical approach and continued with her professional projects. Her work motivation and her aspirations to improve her knowledge in the field of psychology also remained very much alive. In 1926, she applied for a grant from the Council for Extension of Studies, she requested a study trip to Geneva to carry out experimental research in psychology. To apply for a grant from the Council to train abroad, a person needed to have a good academic curriculum, have various publications and speak languages: Regina spoke French and met the other requirements but her application was rejected¹⁸.

Later, on the 1st December 1927, she resigned from her post in La Laguna. As a result of a selection process, she was sent to the Teacher Training College in Lugo¹⁹. In this college, she carried on with her teaching, maintaining her habitual academic commitment as well as writing several articles. The following year in 1928, she once again applied for a paid educational stay to continue and expand her studies in Experimental Psychology at the Institute J.J. Rousseau in Geneva (Switzerland) that she had begun in Spain with Doctor Ziehen. This time, she was successful and was given administrative leave for nine months to carry out her studies in psychology in Switzerland²⁰, but without economic assistance²¹. The subject presented for the grant was *Psychology Applied to Education*. The aim was the study of child psychology and its applications in pedagogy. She moved to Switzerland, to the Institute J.J. Rousseau in Geneva, where she studied Experimental Psychology with prestigious professors like

¹⁷ «Gaceta de Tenerife», 2 October 1924, Inauguration and awards in the assembly hall of the *Instituto General y Técnico* (General and Technical College) of the Canary Islands.

¹⁸ M.^aA. Delgado Martínez, *Científicas y educadoras: las primeras mujeres en el proceso de construcción de la Didáctica de las Ciencias en España*, Universidad de Murcia, Servicio de Publicaciones, Edit.um, 2009, p. 157.

¹⁹ ATTCLL, Staff resignation book, Tomo II (1918-1941); «*La Época*», 19 October 1927, p. 3. The name of Regina Lago García permanent teacher of Mathematics appeared in the Teacher Training College of Lugo. The newspaper «*La Libertad*» (Madrid, 20 October 1927, p. 6) also published the «*La Gaceta*» appointment of Regina Lago García as mathematics teacher in the Teacher Training College in Lugo.

²⁰ Royal Order, 22 October 1928.

²¹ «*El Heraldo de Madrid*», 17 October 1928, p. 2, states specifically: «In accordance with the proposal from the *Junta para ampliación de estudios e investigaciones científicas*, and meeting the requirements specified in Royal Order of 10th June 1914, Mrs Regina Lago García, teacher at the Teacher Training College in Lugo is awarded an eight month stay abroad».

Bovet, Claparède and Piaget²², even though her initial training had been in the branch of experimental sciences²³.

On completing her period of study, she applied for an extension: she had a favourable response from the Principal of the Teacher Training College in Lugo and her leave to stay in Switzerland was renewed. In this country, she not only studied, researched and met prestigious professionals; she also paid visits to new schools, professional schools, boarding and farm schools. From Switzerland, she travelled to Italy to get to know other pedagogical currents that interested her. She visited the *Casa dei Bambini* ("The Children's House"), attracted by the experiences of the well-known Italian doctor, psychologist and humanist, Maria Montessori, founder of the nursery schools that have been so successful and have become extraordinarily widespread all over the world.

Having finished her stay abroad she returned to teaching at the college in Lugo. Shortly after, on the 16th March 1932, she resigned as a mathematics teacher in Lugo to join the teacher training college in Palencia as a natural sciences teacher. In this college, where she had begun her own training decades before, her stay was very brief: she was only there two weeks²⁴ because she was sent to Segovia where she stayed until 1934 as psychology teacher²⁵. Psychology had been included in the first year of the *Plan Profesional* (Teacher Training Plan) 1931 approved by the Second Republic (Decree 29th September 1931). At last, she could teach future generations of teachers about psychology, a subject that had so interested her during her own training. This was why she gave up teaching experimental sciences.

The new approach in the 1931 Plan was more scientific and introduced modern pedagogical ideas. The committee that had developed the Plan was aware of the training needs of future teachers. However, it was not easy to modify certain well-established traditions in teachers' initial training. Both the lack of pedagogical preparation of some teachers as well as the limited experience with innovations led to repetitive learning by heart of content without taking into account any advances. Regina Lago was an innovative and committed teacher, who valued the scientific importance of psychology, a new subject, in the training of teachers. She knew the results of research carried out in other European countries; she had gained both a theoretical and practical knowledge of this discipline as well as key methodological support in the teaching-learning process. In 1934, she passed the exam for the position of

²² The Institute Jean-Jacques Rousseau for education was run by Claparède in Geneva in the Palais Wilson in 1912. This institute was managed by Claparède and Bovet (1878-1965).

²³ Delgado Martínez, *Científicas y educadoras: las primeras mujeres en el proceso de construcción de la Didáctica de las Ciencias en España*, cit., p. 158.

²⁴ C. García Colmenares, *Regina Lago: una psicóloga comprometida con la infancia durante la guerra civil española*, «CEE Participación Educativa», n. 14, julio 2010, p. 212.

²⁵ AEMS (Archives of the Teacher Training College of Segovia), Legacy of teachers' files. See Cerezo Manrique, *La formación de maestros en Castilla y León*, cit., p. 265.

Head of the Materials Section at the National pedagogical Museum, leaving behind teaching in colleges.

3. *Talent and constant commitment to the struggle*

The Council for the Extension of Studies was created with the aim of improving research into different academic disciplines. Using a system of grants, teachers were given the chance of a stay in one of the main centres of innovation in Europe. Through this system, the Council became an instrument of the Institute of Free Teaching (ILE). It was an attempt to break the isolation of Spanish science and to bring it closer to scientific ideas that were circulating in Europe. There were different kinds of grants: the most common were individual ones, which were awarded for an academic year, but which could be renewed. These grants were mainly awarded to men, despite the efforts of the ILE to encourage women²⁶. Sexism was pervasive in attitudes at student residences and stereotypes about women were hard to get rid of as well as educational segregation.

The liberal bourgeois model predominated in the minds of institutionalists²⁷. This fact is significant because, at this time, academic sexism still predominated, generating controversy about sexual differences in intelligence and a mentality of ignoring female talent and justifying discrimination against women. The reason for this discrimination can probably be found in the delay in the incorporation of women in higher education, the difficulties in speaking other languages, family responsibilities and cultural beliefs about social behaviour.

The most fortunate women were teachers in teacher training colleges. These professionals had better academic education, knowledge of other languages, financial resources and a high social status. This was why Regina Lago was able to carry out studies outside of Spain related to education with the aim of improving her teaching praxis²⁸. Moreover, she was allowed to extend her stay, though without any financial assistance. With her fellowship at the Institute J.J. Rousseau in Geneva, she worked in collaboration with the *Liga Española*

²⁶ M.^aT. Marín Eced, *La renovación pedagógica en España (1907-1936). Los pensionados en Pedagogía por la Junta para Ampliación de Estudios*, Madrid, CSIC, 1990, p. 143.

²⁷ M.^aT. Marín Eced, *Modelo educativo en los becados por la JAE*, in J.M. Sánchez Ron (ed.), *La Junta para la Ampliación de Estudios*, Madrid, CSIC, 2010, pp. 199-200.

²⁸ M.^aT. Marín Eced, *Mujeres en la europeización de España (1907-1936)*, in M.^aT. Marín Eced, M.^aM. del Pozo Andrés (edd.), *Las mujeres en la construcción del mundo contemporáneo*, Cuenca, Diputación de Cuenca, 2002, pp. 157-194; M.^aT. Marín Eced, *Innovadores de la Educación en España*, Castilla-La Mancha, Servicio de Publicaciones Universidad Castilla-La Mancha, 1991.

de la Educación Nueva (Spanish League of New Education)²⁹. During her stay abroad, she studied pedagogy and psychology with the intention of innovating in schools and making Spanish education more European. There she studied educational theory, psychological and pedagogical concepts for school teaching, modern teaching methods, school organization, child psychology, tests to measure children's intelligence. In short, she studied a whole range of subjects for modernizing education.

Modern thinking reached Spain through these fellowship students and Regina Lago was one of the teachers who contributed to the renovation of teaching methodology and implementation of new forms of teaching and learning. The New School was the pedagogical reference to revitalize existing schools by introducing new values, such as participation, cooperation, coeducation, tolerance and democracy. She adopted innovative ideas with the desire to incorporate them into the Spanish education system, at a time, when Spanish schools were very distinct from the kind of schools that were spreading over Europe.

Her role and contribution, we find in the articles she wrote and the works she translated in the «Pedagogical Journal» of the *Liga Internacional de la Educación Nueva* (International league of New Education) that was published in various countries. Her drive to improve, to complete her academic training was evident in her career. Her attempts to make Spanish education more European through the scientific knowledge she had acquired in Switzerland and her new pedagogical approaches was demonstrated in many of her activities. She took part in debating forums, courses, conferences and various meetings where opinions and ideas were exchanged. She taught how to teach, explained scientific techniques and employed new methodologies³⁰. She influenced the training of future generations of teachers, who, in turn, contributed to changes in attitudes and innovation in classrooms. Her vision of training went beyond the objectives stated officially. She carried out her teaching using novel techniques and through her students helped to renew popular education. The knowledge and ways of teaching she passed on to her students were in turn passed on through the teaching style that these new professionals used in classrooms. Not only did she infect her students (future teachers) with her enthusiasm for teaching, but she also «contaminated» the classrooms and her fellow trainers through the exchange of ideas and the proposal of another kind of education³¹.

²⁹ E. Otero Urtaza, *Manuel Bartolomé Cossío: Pensamiento pedagógico y acción educativa*, Madrid, MEC, 1994, p. 125.

³⁰ M.A. Cerezo Manrique, *Los comienzos de la Psicopedagogía en España (1882-1936)*, Madrid, Biblioteca Nueva, 2001, p. 90.

³¹ A. Viñao Frago, *Reformas e innovaciones educativas en la España del primer tercio del siglo XX: la JAE como pretexto*, «Revista de Educación», 2007 (Numero extraordinario), pp. 1-44; J. Ruiz Berrio, *La Junta de Ampliación de Estudios, una agencia de modernización pedagógica*, «Revista de Educación», 2000 (Numero extraordinario), pp. 229-248.

Regina Lago was one of the key teachers in the history of elementary and secondary schooling, where she contributed many new ideas to teacher training. She was well versed in modern pedagogical thinking; however, she was not only committed to building up knowledge but also to education in values, democratic principles and citizens' rights. She was a defender of rights and liberties and equally defended academic freedom, that is to say, the right to teach freely and express opinions without being stifled by institutional doctrines. In this way, she supported teachers who were censured by autocratic governments. An example of this took place in 1931; she joined the protest of Spanish intellectuals in defence of free thinking and academic freedom against the imposition of the fascist oath on Italian professors³².

As mentioned before, she was always striving to perfect her teaching; this was the reason for her continued training and her desire to complete her studies abroad. Up till her exile, she was keen to broaden her horizons and never gave up teaching or researching. She contributed to our society of knowledge through the publications she left behind her, with new educational approaches, and made a special contribution to child psychology, whereas other fellowship students left little trace of their training or signs of their work. She was also one of the first women dedicated to the study of psychology, in a period that was not very encouraging for women, as were the first decades of the 20th century, where there was a clear «misogynist legacy»³³. Regina stood out for her feminism and gender awareness.

In 1931, the «Revista de Pedagogía» (Journal of Pedagogy) Madrid, Regina published an article entitled *Las Repúblicas Juveniles*³⁴ (Juvenile Republics). This edition of the journal put forward the idea of education in citizenship and democracy³⁵. It analyzed the experiences of William George in the USA that, subsequently, spread throughout Europe. Later, this system of organization was implemented in war-torn Spain³⁶. In 1932, the same journal published Regina's

³² «Crisol», Madrid 3 December 1931.

³³ S. García Dauder, *Psicología y feminismo. Historia olvidada de las mujeres pioneras en psicología*, Madrid, Narcea, 2005, pp. 27-30.

³⁴ Lago, *Las Repúblicas Juveniles*, cit.

³⁵ J.M. Fernández Soria, *Fundar la ciudadanía, formar el hombre, construir la democracia. Europa como solución para las escuelas de España*, «Revista de Educación», 2007 (Numero extraordinario), p. 258.

The author writes: «A similar experience, which was not put into practice in our country, although some of their principals can be found in other institutions, are the 'Juvenile Republics' that spread throughout America and Europe, and whose concepts were disseminated in Spain by the teacher at the Teacher Training College in Lugo, Regina Lago. They were conceived as a response to the problem of juvenile delinquents, and were based on the idea of 'real democracy' in which their inhabitants were given total responsibility for their actions and decisions. Self-government is the logical consequence of this concept of responsibility» (Lago, *Las Repúblicas Juveniles*, cit., pp. 11-13).

³⁶ J.M. Fernández Soria, *La formación del maestro como educador cívico. Una mirada desde la historia*, in Á. Moreu Calvo, E. Prats Gil (edd.), *La educación revisitada. Ensayos de hermenéutica pedagógica*, Barcelona, Ediciones y publicaciones de la Universidad de Barcelona, 2010, p. 207.

translation of *New Teaching in School Hygiene* by Maud A. Brown (New Education Collection). Regina Lago's commitment to children and youngsters was demonstrated by the articles she published³⁷.

She was also involved with the trade unions. Shortly, after finishing her studies in the Higher Teacher Training College, in 1921, she joined the *Unión General de Trabajadores* (UGT). In 1926, the Lyceum Women's Club of Madrid was created as a cultural space for professional women (lawyers, teachers, doctors, journalists, artists, etc.)³⁸. The first president was María de Maeztu, also the director of the Young Ladies Hall of Residence³⁹. When the Lyceum was founded Regina Lago was working as a teacher in the Canary Islands, and we do not have any evidence that she belonged to the Club⁴⁰. However, we do know of her commitment to women's rights, as shown by articles she published in the Women's Section of the newspaper *El Progreso de Lugo*⁴¹. She participated in the women's movement and was a member of the *Asociación de Mujeres Antifascistas* (AMA) (Women's Anti-fascist Association) and of *Socorro Rojo Internacional* (SRI) (International Red Assistance)⁴².

³⁷ J. Comas, R. Lago, *La práctica de las pruebas mentales y la instrucción*, Madrid, Revista de Pedagogía (reissued in 1948).

³⁸ S. Mangini, *El Lyceum Club de Madrid: un refugio feminista*, «Revista Asparkia», n. 17, 2006, pp. 15-139. The Lyceum was a space of opportunities for women in those times indicates Shirley Mangini: «three unheard of opportunities for women; first, to be able to develop a cultural and social life in coexistence with other women; second, to demonstrate their talents and skills in their own forum; and third, and most significant of all, the chance to put forward changes in the legal and social situation of women – exactly what the patriarchy wanted to resist and annul before (what they believed) the ‘feminist cancer’ – invaded their holy lands, in other words the public and professional sector» (p. 126).

³⁹ *Ibid.* In April 1926, the founding meeting of the Lyceum Women's Club was held and on the 4th November 1926. The first headquarters of the Lyceum Club was opened, in the *Casa de las Siete Chimeneas*, in the street known as *Calle de las Infantas* 31 (Madrid). The first meeting consisted of María de Maeztu, as president and Victoria Kent and Isabel Oyárbabal, vice-presidents. The Lyceum, the first forum aimed at promoting culture and awareness among women, it had an intense vitality and included the participation of the majority of the female intellectual elite of that time. Following the Civil War, it changed to the Club Medina, managed by the *Sección Femenina*, which reinforced the subservient role of women, in accordance with ideals of domesticity, submissiveness and obedience (p. 137).

⁴⁰ J. Aguilera Sastre, *Las fundadoras del Lyceum Club español*, «Brocar, Cuadernos de Investigación histórica», n. 35, 2011, pp. 65-90.

⁴¹ C. García Colmenares, *Las primeras psicólogas españolas becadas por la Junta de Ampliación de Estudios e Investigaciones Científicas*, «Revista de Historia de la Psicología», 2008, vol. 29, n. 3-4, p. 71.

⁴² C. García Colmenares, *Psicólogas republicanas en el exilio: las excusas maltrechas de la memoria*, in J.L. Barona Villar (ed.), *El exilio científico*, Valencia, Universidad de Valencia, 2011, p. 63.

4. Regina's work during the Spanish civil war

During the Second Republic, and for the first time in the history of Spain, women had rights as citizens, rights which allowed them to participate in the public arena, including being involved in politics and the right to vote. The success at incorporating women as fully-fledged citizens was one of the main features of these particular years of change. This social and cultural transformation together with the pedagogical renovation, inspired by the Institute of Free Education and the *escuela única socialista* (Unified socialist school) in which republican teachers participated actively, were singular aspects of these years. However, intellectuals of the stature of the philosopher José Ortega y Gasset or Doctor Gregorio Marañón, despite the clear advances in the scientific-cultural world, warned of the dangers of the «masculinization of women», a position in juxtaposition to those who were open to opportunities, change and progress⁴³. Some women even began to take up positions of political relevance (MPs, mayors) and management positions. However, in July 1936, when the army rebelled against the Republican Government, all the efforts made in favour of these new educational and social projects were blocked. The dream of the intellectual elite to advance towards a more cultural and freer Spain was quickly annihilated.

During the Civil War, Regina carried out work in positions of responsibility in the Government of the Second Republic. In July 1936, she was appointed Director of the *Centro de Niñas Difíciles* (Centre for Problematic Girls) in Carabanchel Prison and substituted María de Maeztu as manager of the Young Ladies Hall of Residence in Madrid⁴⁴. In November 1936, coinciding with Republican Government abandoning Madrid, the Residence was moved to Valencia. She was also president of the committee of the Women's Group of the Students' Residence that was temporarily set up in Paiporta (Valencia). In February 1937, the Ministry of Public Instruction and Health created the *Delegación Central de Colonias* (Central Office for School Camps), which depended on the General Management of Primary Education: Regina Lago was appointed as the educationalist in charge⁴⁵.

⁴³ N. Aresti, *Médicos, donjuanes y mujeres modernas*, Bilbao, Universidad del País Vasco, 2001, p. 257.

⁴⁴ E. Otero Urtaza, *Els orígens del pensament educatiu de la segona republica*, «Educació i Història: Revista d'Història de l'Educació», n. 11, genero-junio 2008, pp. 50-74.

⁴⁵ Regina Lago García, regarding the Camps wrote in «El Magisterio Español», 23 June 1937: «Every teacher, these days should have no more than two aims: first as an antifascist to win the war, for if the enemy triumphs, it will mean the end of culture and, second, as a teaching professional to dedicate oneself totally to the welfare of the children. For us, the best war contribution, in which we should put all our efforts and capabilities, is in the service to children in the Camps. To achieve victory in the reality of a happy tomorrow, the children of today need you, teacher, and they are waiting for you in our School Camps».

Later, the *Consejo Nacional de la Infancia Evacuada* (National Committee of Child Evacuees) was established with the objective of coordinating the work of all the Spanish Offices abroad. In this sense, her actions and involvement in different institutions to help the evacuation of children and population were quite significant. During the war, her concerns about the situation of children led her to organize camps for children and youngsters. She played an important role in the evacuation of minors and settling them in school camps. These pedagogical camps were spread over the Levante area and thousands of children attended them during the Spanish Civil War⁴⁶. In December 1937, in a report by the Ministry of Public Instruction, there were a total of 170 such school camps in the Levante area (Valencia, Castellón, Alicante Murcia), Aragón and Cataluña. The report estimated that 17,000 children were being looked after in them behind the front lines. The work of the camps was two-fold: assistance and education, but the excessive number of children made the latter almost impossible as the camps became improvised refuges⁴⁷.

At the end of 1937, she moved to Paris as the Spanish Delegate for Child Evacuees, where she stayed until the end of the war. She supervised and assisted the transfer of minors to various countries, where children were being given refuge (Belgium, Mexico, Norway and Russia). She worked hard internationally to help the evacuation of children to school camps abroad. As well as looking after children, when the war had finished, she helped the evacuation of the civil population to France. She also worked in the Propaganda Office of Spanish Republic in Paris (May 1938 to February 1939). On the 7th February 1939, Regina Lago helped with the evacuation of civilians across the border in the Junquera (Gerona) into France.

In the camps, she studied the emotional impact of the war on children through drawings and paintings. These drawings represented a testimony of the war from the children's perspective. The children did drawings based on their experiences as witnesses of the conflict and, thus, contributed a visual memory of the Civil War. Later in France, in March 1939, she organized an exhibition of these children's drawings that was shown in the Pedagogical Museum of Paris. The initiative for the exhibition came from the *Office Internationale pour l'Enfance* and was the basis for some research that she published later in Mexico. She remained some time in Paris and between the months of February and September 1939, where she was in charge of the *Office pour l'Enfance*.

⁴⁶ C. García Colmenares, *Regina Lago: una psicóloga comprometida con la infancia durante la guerra civil española*, «CEE Participación Educativa», n. 14, julio 2010, pp. 211-220.

⁴⁷ Regina Lago presented a report, in French, at a conference organized by Coordination and Assistance Committee for Republican Spain held in Paris on the 20 and 21 November 1937. In this report, she included data on the organization and assistance given to evacuated children. There were 159 school camps organized with 12,027 children. In the Levante area, there 115 camps with 8,300 children.

One of the first tasks that Regina Lago carried out following her exile to Mexico was to disseminate the pedagogical work with the Spanish refugee children in France. As mentioned previously, she studied the children, victims of the war, through their own drawings. She analysed 1,872 drawings, which led to an article *La guerra a través de los dibujos infantiles* (War through children's drawings) that was published in August 1940, in the 8th edition of the journal *Education and Culture: research* that was of a novel psychological nature. In that period, the analysis of the suffering caused by war through children's drawing, from a pedagogical and psychological perspective, was an unknown technique⁴⁸. The psychological repercussions on children's personalities when faced with a conflict, separation from their family, being uprooted, hunger, fear, etc. were depicted in their drawings. It was the first time that a study of this kind had been done, and, at the same time, Regina was the first Spanish researcher in this field. In this way, she demonstrated a new therapy to help children overcome the trauma of war. She appreciated the importance that the atmosphere in the school camps had had in helping children endure the terrible conditions of the war.

The analyses of the narratives were classified depending on stages, age and sex, showing the main and secondary subjects before, during and after the war. The life in the camps had helped, to a certain degree, to soften the emotional blows, according to the educationalist Regina Lago⁴⁹. The children had suffered in different ways the war and their drawings depicted these experiences. The impact of the traumatic scenes could be seen to mix with memories from the past. An experience would come back to their minds through these images: images that would remain with them throughout their lives. The guidelines given by the Ministry of Public Instruction were included by Regina Lago⁵⁰ in her research. The children drew their pictures following the criteria below:

1. *Scenes of the child's life before the war;*
2. *Scenes of the child's life during the war;*
3. *How the child imagines life after the war.*

She examined the drawings of 624 children aged between 6 and 14 years old. Following her methodology «the total number of drawings was 1,872, of which 359 were by boys and 265 by girls». In the study of these semi-guided drawings by children, she observed differences according to age. Regina Lago wrote that:

The origins of the drawings are extremely diverse. They were all drawn by children who were living in Catalonia at the time; many of them belonged to Catalonian families, others

⁴⁸ A. Hernández Merino, *Las hebras para hilvanar la vida: el dibujo del dolor*, «Arteterapia», n. 1, 2006, pp. 79-96. Vid. epigraph «Regina Lago y la guerra a través de los dibujos», pp. 88-90.

⁴⁹ *Ibid.*

⁵⁰ R. Lago, *La Guerra a través de los Dibujos Infantiles*, «Educación y Cultura», August 1940, pp. 422-437.

were by children evacuated from different Spanish regions and were in the school camps. There were 30 schools that worked on this research, the majority of which were divided into 10 classes or sections. Thus, there were a total of 300 classes with pupils from different origins (avoiding the influence of suggestion or copying). As for the number of school camps that contributed drawings, there were 15, all set up in the provinces of Barcelona or Gerona. We have already mentioned that their ages ranged from 6 to 14 years old, and for completely fortuitous circumstances the number of drawings collected from boys was greater than the number from girls⁵¹.

The children's drawings that Regina studied, exhibited and kept are a valuable part of Spanish heritage, as well as being testimonies of the past and a novel methodology to analyze the impact of military conflicts on children. This work attempted to visualize the effects from the perspective of those not directly involved in the war, the innocent victims. As highlighted by some experts, the drawings reflected a return to normality, with everyday life similar to the one before. They were a great pedagogical and psychological depiction of the children's experiences; reflecting suffering, shock and desolation⁵².

Her pedagogical and methodological knowledge gained from her international studies were clearly demonstrated in her professional work. From the moment she arrived in Mexico, she became totally involved in promoting psychological approaches in academic forums, in her classes and in her articles⁵³.

5. *The winding road to exile. Gender bias*

During the Spanish Civil War, Regina and her husband Juan Comas lived in different places and spent time apart, until meeting up again later in France. The post-war period began, and in the so called «Year of Victory» the reprisals against those defeated started. They, like many intellectuals, were disaffected with the new regime for ideological reasons and in fear of reprisals by the victors, they were forced to abandon their homeland and move to other countries. Regina Lago began her journey to exile and did not touch Spanish soil again until 1963. On the 22nd September 1939, Regina together with her husband, who she had met up with in Paris, travelled to Holland and, in Rotterdam, boarded the steamboat New Amsterdam⁵⁴. After a stopover in New York, she

⁵¹ *Ibid.*, pp. 424-425.

⁵² *Ibid.*

⁵³ In 1940, she also published the Mexican version of *Cómo se mide la inteligencia infantil*, (How to measure children's intelligence) a book of 156 pages edited by Ediapsa. In 1941, she published a study entitled *La enseñanza de la psicología en el Grado preparatorio* (Teaching psychology in High School) in the 3rd edition of the journal *Reforma* (Mexico). R. Lago, *Cómo se mide la inteligencia infantil*, México, Editorial IDIAPSA, 1940.

⁵⁴ A. Hernández de León Portilla, *España desde México. Vida y testimonio de transterrados*,

reached Mexico, arriving at the port of the city of Veracruz on the 16th October 1939⁵⁵.

In exile, she continued with her academic and professional activities, although she found greater difficulties than her male colleagues. Exile was more complicated for women and they often encountered obstacles, such as precariousness, separation and not being listened to. Women had to face these obstacles despite the dedication they had shown to the Republican cause and the institutional support they received. The experiences of women exiled for political reasons were not so different from diasporas of an economic nature, both involved a forced emigration, and their lives were marked by discrimination and gender stereotypes. In the history of Spanish women's emigration, this period saw the greatest exodus: the number of exiled women increased significantly. Among them were professionals, housewives, well-known politicians and intellectuals like Regina Lago, although they were mostly unknown in Mexico. In this country, nobody had heard of Regina's research or of her professional and political career.

The largest number of exiled women lived in France but in second place was Mexico thanks to the refuge given to exiles by President Lázaro Cárdenas. According to data from the *Junta de Ayuda a los Republicanos Españoles* (Committee for Assistance to Spanish Republicans), between 1939 and 1949 women represented 41,2% of refugees abroad: the figure given by *Servicio de Evacuación de Refugiados Españoles* (Evacuation Service for Spanish Refugees) was 45%⁵⁶. In Mexico, both the Committee for Assistance to Spanish Republicans and the Evacuation Service for Spanish Refugees helped those in exile. In the 1940s, all those exiled held on to the goal of recovering their «lost mother land»⁵⁷. There was anti-Franco political activity, and they still fought for the return of the Republic. In Mexico, the association *Unión de Mujeres Española* (Spanish Women's Union) was organized according to the model of the Women's Anti-Fascist Association (founded in 1933) that had played such a prominent role in Republican Spain.

Regina Lago continued with her political and social commitments, she participated together with other activists in a range of activities to make people aware of the situation in Franco's Spain. She took charge of campaigns to collect

Madrid, Edaf, 2004, pp. 175-190.

⁵⁵ J.L. Barona Villar (ed.), *El exilio científico republicano*, València, Universitat de València, 2011, p. 60; P. Weiss Fagen, *Transterrados y ciudadanos: Los Republicanos Españoles en México*, México, Fondo Cultura Económica, 1973. According to information available, in 1940 the couple lived in Department 14, house 14 in Abraham González Street (Mexico, DF).

⁵⁶ D. Plá, *Características del exilio español en México*, in C. Lida (ed.), *Una inmigración privilegiada. Comerciantes, empresarios y profesionales españoles en México*, Madrid, Alianza Editorial, 1994, pp. 218-231.

⁵⁷ G. Di Febo, *Memoria e identidad política en los escritos autobiográficos del exilio*, in A. Alted, M. Llusia, *La cultura del exilio republicano español de 1939*, Madrid, UNED, 2003, pp. 305-318.

funds to help colleagues and prepare the reception of teachers who arrived in Mexico. She did not forget about those people oppressed in Spain either, giving assistance to Republicans who had stayed in Spain. She even tried to arrange the release of those detained in concentration camps in Africa. She participated as a delegate in the FETE (Spanish Teachers' Union) and in the Council for Assistance to Guerillas in Spain. Despite all the efforts made, these exiles did not make much headway as they lacked sufficient resources. Following the reorganization of the Spanish Teachers' Union in exile, Regina became part of its Executive Committee, which organized a professional group. Regina Lago was elected as the secretary of this group known as the Solidarity and Assistance Committee for Teaching Professionals in Spain. The post was elected each year and Regina was re-elected several years running. We know that she was secretary between 1943 and 1948, subsequently she was appointed as vice-secretary.

On her arrival in Mexico, Regina Lago received assistance from the Technical Committee for Assistance to Spaniards (Mexico, D.F.). Through this Committee she got her first position as teacher (18th December 1939) of General Psychology in the *Escuela Preparatoria* of the Universidad Nacional Autónoma de México (UNAM)⁵⁸. This High School was aimed at preparing students for study at the University⁵⁹. Afterwards, she worked as teacher of Psychology and Psychotechnics in the Teacher Training College of Pachuca de Soto (Estado de Hidalgo) until 1955⁶⁰.

Later, she was appointed as teacher of Psychology in the *Escuela Nacional Preparatoria*. She worked in various universities and teacher training colleges in Mexico. The influence of European schools of thought was important in the study of Psychology in Mexico. Thus, Regina Lago, given her educational background, entered Mexico's academia. However, her work in exile never obtained the professional recognition it deserved. The career of Regina Lago was also subject to the male-dominated world she lived in. Gender as all historical and social constructs has changed over time. However, the interpretations

⁵⁸ J.J. Sánchez Sosa, *Cien años de la psicología en México 1896-1996*, México, UNAM, 1997, pp. 59-67. There had been a Chair of Psychology already part the curriculum of *Escuela Nacional Preparatoria* (ENP) (Senior High School) since the end of the 19th century. In 1897, Psychology was included as a subject in the ENP. Later, it was introduced into university education in the *Escuela de Altos Estudios de la Universidad de México*, institution established in 1910. In 1916, the Laboratory of Experimental Psychology was founded to promote studies in the university and was the beginning of the Psychology Faculty that was finally created in the last decade of the 20th century.

⁵⁹ *Ibid.*, pp. 21 and 26. At the beginning, Experimental Psychology repeated the teachings used abroad and did not study Mexican cases, but since the Porfirian stage there has been a development of a more Mexican identity that has generated many studies; various views suggest a Europeanization tendency.

⁶⁰ Pachuca de Soto, capital of the State of Hidalgo, which is located 96 km north of the State of Mexico.

made by institutions of that period of the roles men and women had great influence. In this manner, women were, simply, not valued in the same way as men, despite sharing the same social and historical space. Women often faced male-imposed obstacles that restricted their academic work. Little is said and many achievements forgotten of the contributions of women. These prejudices made the efforts of exiled women to remain in the field of science even more commendable.

Exile dragged on and the possibility of return became even more uncertain and the hope of returning to Spain slowly dimmed over time. Although the dream of returning to a democratic Spain disappeared, Regina always missed her country⁶¹. Nostalgia was an integral part of her identity, like many other exiles: as stated by Mario Benedetti «nostalgia is often a key trait in exiles»⁶².

In summary, being an exile affected Regina in aspects of her life: it was not easy to enter Mexican society despite the support she received. On a personal level, she suffered from being uprooted and poverty as she had exhausted her financial resources. As for her professional life, her work gave her some hope and she threw herself into the practice of teaching. She passed on the knowledge she had acquired and her European experiences to Mexico. She was able to redefine her educational practices and knowledge within Mexican educational institutions.

Conclusions

In the first third of the 20th century, several Spanish teachers marked the period with their innovative pedagogical approaches. Among these was Regina Lago, whose career left its imprint on Spanish education. This scholar began her career as a primary school teacher and then went on to train to be a teacher at a Teacher Training College. Later, she continued to advance in her knowledge and the development of her teaching skills. She demonstrated she was a competent professional, a progressive intellectual and independent person who conquered the male dominated area of science. She moved in highly educated circles and left her modernizing stamp on education. Her academic stay in Switzerland allowed her to acquire new learning and develop a more international approach to education. She disseminated the pedagogy she had learned during her years of training in the different centres where she worked. Teacher of teachers, she

⁶¹ See J.L. Barona Villar (ed.), *El exilio científico republicano*, València, Universitat de València, PUV, 2011; J. Canal (ed.), *Exilios. Los éxodos políticos en la historia de España. Siglos XV-XX*, Madrid, Editorial Silex, 2007; F. Caudet, *El exilio republicano en México. Las revistas literarias (1939-1971)*, Alicante, Universidad de Alicante, 2007; A. Sánchez Vázquez, *Recuerdos y reflexiones del exilio*, Barcelona, Gexel, 1997.

⁶² M. Benedetti, *Articulario. Desexilio y perplejidades*, Madrid, El País-Aguilar, 1994, p. 145.

contributed to the training of future generations of teachers, going beyond the knowledge at that time and modernizing educational thinking. She was on the cutting edge of pedagogy and knowledge; she was a forerunner in educational psychology and knew how to act depending on the historical and geographical context in which she found herself. The institutions for which she worked in Spain benefited from her knowledge, both in education as well as in other extracurricular activities. Almost without changing the typical female stereotype, hardly transgressing her role, Regina combined her private life with her professional one. She was married to Juan Comas, school inspector with whom she shared pedagogical concerns, although later they got divorced⁶³.

Regina Lago was a significant, female intellectual, who carried out important activities during the Second Republic. Equally, her work during the Spanish Civil War was also highly regarded both for her example of solidarity with children and refugees, as well as her ethical commitment to republican ideals. Following the Civil War, Spain lost her knowledge and teaching skills to Mexico, a country that opened its doors to large numbers of exiled intellectuals, both women and men, who maintained their ethical principles. The stigma of exile affected Regina greatly; her life in Mexico was not easy; as well as the lack of recognition of her teaching knowledge, her marriage also broke down. Her second husband was Louis Keliampoff, ex-combatant of the International Brigade in the Spanish Civil War: an exiled Bulgarian in Mexico. Despite being in exile, Regina contributed her experience and knowledge and her teaching spread within the cultural life of Mexico. However, she was never properly recognized in the field of psychology, even though her activity has not been totally ignored, it has been somewhat 'invisible' within this discipline.

Added to the silence of exile was the silence that Franco's regime subjected her to, like so many other intellectuals of the period. Her double condition of being progressive and a woman resulted in her exclusion from the dictatorship of Spain. She did not even have the chance to return to her sorely missed homeland, an impossible dream, except for the short stay in 1963 to visit her mother. An ephemeral visit which led once again back to Mexico where she died on the 20th November 1966. In the history of education there is a debt to be paid to the many pioneering women in the academic world who have not been sufficiently appreciated. The case of Regina Lago is a clear example of this.

⁶³ In Mexico Juan Comas became a well-known anthropologist, who worked as lecturer in the Universidad Nacional Autónoma in México and in the National School of Anthropology and History. In Mexico he carried out a wide range of research into the diverse indigenous pre-Hispanic tribes, but he also distinguished himself in the defense of the rights of these natives. Together with other academics he founded the Institute of Anthropological Investigation.

L'educazione dei sordomuti a Genova nell'Ottocento

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The education of the deaf and dumb in Genoa in the nineteenth century

ABSTRACT: This essay retraces the origin and development of the Institute for the deaf and dumb in Genoa by examining abundant archival material that has not been investigated up to now. The Institute was assigned to create a model for the education of the deaf in the Italian scenario in the 1800's. It is a wide ranging study which, unlike the few types of angiographic and commemorative publications available on this topic intends to highlight the complex interweaving among a plurality of political, religious, social, educational dimensions within which this particular historical experience places itself and unfolds.

EET/TEE KEYWORDS: Deaf-Dumbness; Special Education; History of Education; Italy; XIX Century.

1. *I difficili esordi*

L'educazione dei sordomuti a Genova è legata alla figura di Ottavio Assarotti, uno scolio di ingegno e profonda cultura, avviato a una brillante carriera di insegnante nelle scuole secondarie dell'ordine¹. Decisivo fu il suo incontro

¹ Assarotti insegnò grammatica superiore dal 1777 al 1781 presso la casa professa degli scolopi a Genova. Negli anni successivi, resse le cattedre di fisica, logica e teologia nelle Scuole Pie di Albenga, di Savona e del capoluogoligure. Dal 1804 attese, esclusivamente, all'educazione dei sordomuti. Sulla figura e sull'operato del religioso ligure cfr. A. Dolci, *Assarotti Ottavio*, in *Dizionario biografico degli Italiani* (d'ora in avanti cit.: DBI), Roma, Istituto Enciclopedia Italiana, Vol. IV (1962), pp. 433-434; S.K. Torlutter, *Ottavio Assarotti und sein Einfluss auf die Entwicklung der Italienischen Gehörlosenbildung im 19. Jahrhundert*, Universität Hamburg, Hamburg, 2004 (copia dattiloscritta della tesi); R. Sani, *Assarotti Ottavio Giovanni Battista*, in *Dizionario biografico dell'educazione (1800-2000)* (d'ora in avanti cit.: DBE), Milano, Editrice bibliografica, 2013, Vol. I, pp. 70-71.

all'inizio dell'Ottocento con Antonio Daneri, giovane non udente dotato di una spiccata intelligenza e di un carattere vivace: il religioso cominciò a istruire, nella sua cella presso il convento di S. Andrea, il promettente allievo seguendo le orme dell'abate Charles Marie de l'Épée, pioniere dell'istruzione speciale in Francia².

I rapidi progressi compiuti dall'alunno spiegano da un lato il felice tentativo di estendere la proposta ad altri soggetti con lo stesso *deficit* sensoriale (ben presto al primo si aggiunsero cinque ragazzi, destinati a costituire il nucleo della scuola privata), dall'altro la crescente notorietà dell'iniziativa tra le mura cittadine come attestano i giudizi positivi espressi sulla stampa locale³. Non sorprende, pertanto, la decisione dell'Istituto Nazionale Ligure, la prestigiosa istituzione culturale del periodo democratico e napoleonico incaricata di provvedere alla riorganizzazione degli studi⁴, di conoscere da vicino un'esperienza che, oltre a godere del favore dell'opinione pubblica, rappresentava un'assoluta novità nel panorama educativo della regione. Al termine di un'accurata e approfondita indagine, Gaetano Cantoni e Francesco Carrega, membri del sodalizio, scrivevano alla commissione straordinaria del governo repubblicano:

L'esame fu frequente e diligentissimo: si tentò, si provò a più riprese e maniere la supposta capacità di questa specie per noi nuova di discepoli, e più di un rapporto si lesse su tal proposito. Tutto riuscì con soddisfazione [...]. Ma il Citt. Assarotti abbonda di lumi, e non di mezzi; la sua esperienza perciò non può dirsi che un saggio. Che il Governo protegga con mano generosa le cure di un Concittadino tanto benemerito, e noi vedremo di breve con meraviglia e con gioia, che ben molti di questi esseri infelici donati finalmente a se stessi e alla società, sapranno d'essere uomini e cittadini, e si sentiranno ad un tempo sufficienti per contribuire di per sé al proprio non meno che al pubblico bene⁵.

² Sul modello francese e sulla sua fortuna in Italia cfr. R. Sani, *L'educazione dei sordomuti in Italia prima e dopo l'Unità. Itinerari, esperienze, discussioni*, in Id. (ed.), *L'educazione dei sordomuti nell'Italia dell'800. Istituzioni, metodi, proposte formative*, Torino, Sei, 2008, pp. 3-10.

³ Si legge sul «Monitore ligure» del 28 novembre del 1801: «Sono già molti mesi che nel Collegio di S. Andrea delle Scuole Pie il Citt. P. Ottavio Assarotti ha aperta una Scuola pei *Sordo-Muti* [...]. Assicurano molti nostri cittadini che sono stati presenti alle di lui lezioni, che quei giovanetti *Sordo-Muti* profittano moltissimo, ed oltre lo scrivere con esattezza, alcuni di essi cominciano a sommare, a sottrarre i numeri interi coi rotti, a coniugare i verbi, declinare i nomi, e a mostrar di conoscere le parti principali del discorso; più ancora: a pronunziare con qualche distinzione la maggior parte delle sillabe» (p. 456).

⁴ L'Istituto Nazionale Ligure, fondato con regio decreto 5 ottobre 1798, aveva il compito di organizzare il settore della pubblica istruzione dalle scuole primarie all'università: era suddiviso in due classi, destinate a diventare tre con la legge del 24 gennaio 1800 (scienze matematiche e fisiche; filosofia; letteratura e belle arti). Nel 1805 fu trasformato in Accademia imperiale delle scienze e delle arti di Genova.

⁵ *Rapporto de' Cittadini Cantoni e Carrega, fatto per ordine dell'Istituto Nazionale, alla Commissione Straordinaria di Governo sulla Scuola de' Sordo-muti* (15 gennaio 1802), nell'appendice *Documenti* del testo di S. Monaci, *Storia dell'Istituto nazionale pei sordomuti in Genova*, Genova, Tip. Sordomuti, 1901, pp. XV e XVIII. Su Carrega, sacerdote genovese di tendenze gianseniste e interprete di una visione giurisdizionalista nei rapporti tra Stato e Chiesa, si veda la voce di M. Caffiero Trincia nel DBI, Vol. XX (1977), pp. 722-724.

A distanza di pochi mesi il brillante esito di un saggio, sostenuto dai non udenti al cospetto delle autorità religiose e pubbliche, confermava questa positiva impressione. È sufficiente leggere il testo del programma per avere un'idea della variegata tipologia di esercizi e dell'ampiezza dei contenuti che, distribuiti su più discipline (italiano, storia naturale, geografia, religione), costituivano l'argomento di una serie innumerevole di domande⁶. I sei sordomuti, d'età compresa tra i 9 e i 15 anni, si dimostrarono in grado, al termine di un anno d'istruzione, di scrivere il nome di oggetti rappresentati graficamente, di classificarli, di attribuire loro qualità e azioni attraverso il ricorso all'alfabeto e all'uso dei gesti. Denotavano anche discrete capacità di calcolo nello svolgimento delle quattro operazioni elementari e un'adeguata conoscenza dell'analisi grammaticale nella scomposizione di frasi e nell'esame delle singole parti del discorso. Luigi Oliva e Filippo Castelli pronunciarono anche alcune parole d'introduzione e ringraziamento all'indirizzo dei presenti.

Analogo era lo schema che, nel 1804, caratterizzava il secondo esperimento pubblico: il sapere che gli allievi davano prova di possedere comprendeva, oltre alle già citate e meglio approfondite materie, le principali nozioni di storia patria, di cosmografia, di logica, di fisica e di geometria, espresse in più di 1.600 quesiti⁷. Negli anni successivi fu introdotto il pantomimo, una messa in scena di vicende tratte dalla storia sacra attraverso passi e movimenti regolati sulla cadenza e sul ritmo della musica⁸.

Appare quindi evidente, fin dall'inizio, la predilezione per il modello francese, basato sulla mimica, la dattilologia (detta anche «alfabeto aereo») e la scrittura nella convinzione che il linguaggio verbale potesse essere acquisito al termine del percorso solo dagli alunni più capaci. Se è vero che i presupposti accomunano l'esperienza ligure e quella d'oltralpe, è altrettanto vero che la pratica didattica del padre scolopio presenta tratti di originalità. Non a caso diversi istituti stranieri manifestarono vivo apprezzamento nei confronti dell'opera avviata da Assarotti, desiderosi di avere maggiori notizie sul sistema da lui adottato: se nel 1802 l'abate Roch-Ambroise Sicard, successore di de l'Epée, non esitava a scrivere al collega italiano «vous ferez faire des très grands pas à cette science nouvelle», nel 1805 August Friedrich Petschke, destinato a raccogliere l'eredità di Samuel Heinicke all'interno della scuola per sordomuti di Lipsia, esprimeva, in una lettera, la volontà di conoscere un sistema che, «dans un espace de trois

⁶ Si trattava di domande brevi e semplici, invariate il più possibile nella struttura (*Il Regno, il quale comprende gli animali, come si chiama?*, *Il Regno, il quale comprende li vegetabili, come si chiama?*, *Il Regno, il quale comprende i minerali, come si chiama?*) e formulate con il ricorso a un limitato numero di verbi. Per il programma cfr. *Esercizio accademico* (29 luglio 1802), Genova, Stamperia Nazionale, 1802.

⁷ Cfr. *Esperimento delli sordo-muti liguri sulla loro istruzione dei primi tre anni* (20 settembre 1804), Genova, Stamperia Delle Piane, 1804. In quello successivo, datato 12 maggio 1809, le domande risultano pressoché raddoppiate.

⁸ Si veda, al riguardo, la testimonianza dell'istitutore Marcacci in *Elogio funebre del padre Ottavio G.B. Assarotti*, Livorno, Tipografia Sardi, 1834, p. 135.

ans, à peu près», consentiva di apprendere «à fond» un sapere così vasto⁹. L'assenza di pubblicazioni sull'argomento e la proverbiale affermazione del religioso genovese («il miglior metodo è quello di non avere un metodo»)¹⁰ non devono, infatti, indurre a ritenere la sua proposta educativa poco articolata o non puntualmente definita nelle fasi di attuazione.

L'attestato di stima da parte delle autorità politiche, la vasta eco nell'opinione pubblica e il consenso a livello internazionale non si tradussero, però, nell'adozione di misure concrete a sostegno dell'iniziativa: solo dopo reiterate istanze venne messa a disposizione come sede temporanea della scuola una parte del Monastero della Neve, stabile che necessitava di un cospicuo investimento per essere idoneo allo scopo. La precarietà e il carattere oneroso della soluzione proposta indussero Assarotti a rifiutare l'offerta. Bisognava attendere l'avvento di Napoleone che, con decreto del 4 luglio 1805 (15 messidoro dell'anno XIII), decideva di assegnare all'istituzione uno dei locali delle congregazioni soppresse: sui fondi provenienti dallo scioglimento degli ordini religiosi dovevano essere stanziati anche dodici posti gratuiti¹¹. Una contesa sorta tra il ministro dell'Interno e il Gran maestro dell'università in merito all'esercizio delle funzioni di sorveglianza sull'istituto (sciolta poi a favore del primo) era destinata a procrastinare i tempi di applicazione del provvedimento. Non si rivelò semplice nemmeno la scelta dell'edificio adatto a ospitare i giovani non udenti: solo il 21 novembre 1811, con decreto dell'imperatore, venne assegnato al sacerdote genovese l'ex convento delle suore di S. Brigida, conosciuto in città sotto il nome di Nostra Signora della Misericordia.

Nei mesi successivi, grazie a una serie di disposizioni legislative, il progetto cominciava a prendere forma: dal reperimento della somma necessaria alle spese «di primo impianto», (circa sei mila franchi), all'insediamento della commissione amministrativa, composta di cinque membri, designati dal ministro dell'interno francese; dall'incarico di direttore ad Assarotti, responsabile dell'educazione morale e dell'istruzione degli alunni, all'entità degli stipendi del personale, pari a due terzi di quelli corrisposti nell'analogo istituto parigino¹². Veniva,

⁹ Il testo integrale delle due lettere è pubblicato nell'appendice *Documenti* in Monaci, *Storia dell'Istituto nazionale pei sordomuti in Genova*, cit., pp. LI-LV e LXVI-LXVII.

¹⁰ La celebre frase, contenuta in una lettera al professor Giacomo Sacchetti di Pisa, è costantemente riproposta nei diversi scritti finalizzati a ricostruire, con toni a tratti agiografici, l'esperienza umana e professionale di Assarotti. Il religioso ligure fu comunque autore di testi rivolti all'educazione dei sordomuti: in prevalenza opuscoli relativi alle verità di fede e alle pratiche devozionali. Per una ricostruzione dell'elenco delle sue pubblicazioni, comprese quelle di natura teologica, cfr. E. Codignola, *Carteggi di giansenisti illustri*, Firenze, Le Monnier, 1941-1949, Vol. I, pp. CCL-CCLI.

¹¹ Si vedano, nello specifico, gli articoli XXXVIII e XXXIX del *Decret sur l'instruction publique dans la Ville de Gênes* (4 juillet 1805), in Archivio di Stato di Torino (d'ora in avanti cit.: AST), *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118.

¹² Sulla base di tale criterio lo stipendio risultava di 3,200 franchi per l'istitutore responsabile della direzione della scuola, di 1800 per quello in seconda, di 800 per il ripetitore, di 1200 per l'economista generale, di 600 per la sorvegliante, di 200 per il portiere e la cuciniera, di 100 per ogni

infine, redatto il regolamento organico, volto a disciplinare l'attività didattica e a scandire i tempi della vita quotidiana all'interno della scuola e del convitto. Nella struttura potevano essere accolti un centinaio di sordomuti tra i 12 e i 16 anni (60 maschi, 40 femmine): 88 posti erano a carico delle famiglie, tenute a pagare una pensione annua di 600 franchi; gli altri, riservati alle classi popolari, erano a spese dello Stato che se ne arrogava il diritto di nomina¹³. L'orizzonte in cui si colloca l'intervento governativo è caratterizzato da una chiara preoccupazione per la tutela dell'ordine sociale:

Ce élèves reçus gratuitement etant choisis dans les familles peu aisées, il faut se garder de leur laisser prendre des habitudes et une façon de vivre au dessus de celles de la classe dans la quelle il sont nés. C'est un bon metier qu'il convient surtout de leur apprendre et autant que possible celui de leur pères¹⁴.

Nell'*iter* scolastico, della durata di cinque anni, gli allievi acquisivano le abilità della lettura e della scrittura oltre a nozioni di grammatica e logica, di calligrafia e disegno, di aritmetica e geometria, di geografia e storia: la domenica mattina partecipavano alla funzione religiosa e alle lezioni di catechismo. Era prevista un'alternanza tra studio e lavoro nell'arco di una giornata di quattordici ore (dalle cinque del mattino alle nove di sera) organizzata in modo rigido e puntuale.

Il 1° dicembre 1812 veniva ufficialmente aperto l'istituto a conclusione di un percorso lungo e difficile, contrassegnato anche da momenti di dubbio e di scoraggiamento. Significativa al riguardo è la testimonianza del superiore provinciale degli scolopi della Liguria, Maurizio Francesco Benza, intervenuto a confortare e a sostenere il confratello nell'opera intrapresa:

Che fate? – aveva detto ad Assarotti durante un colloquio privato – perché vi veggio io così mesto, come persona, a cui sia fallita una speranza terrena? Vi avrebbe mai il Signore ispirato questo santo pensiero, perché, appena messo mano all'opera, voi doveste abbandonarla? E credete voi che cosa alcuna vi possa mancare, se voi non mancate a voi stesso? Oh vedete quanti infelici hanno bisogno di voi, e come, all'annuncio che voi sarete loro padre, già vi stendono le braccia, aspettando che voi mostriate loro un altro Padre, che ancora non conoscono. Oh, non vogliate respingerli di nuovo nella loro miseria, non tradite la speranza che voi stesso avete creato in loro¹⁵.

altra tipologia di inserviente assunto presso la struttura. Nel caso del medico si ipotizzava una retribuzione pari a 500 franchi.

¹³ Per ulteriori approfondimenti cfr. *Extrait des Minutes déposées à la Préfecture de Gênes* (20 marzo 1812), in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118.

¹⁴ *Lettera del Ministro dell'Interno di Parigi al Prefetto del Dipartimento di Genova* (7 dicembre 1811), in L.A. Boselli, *Sui rapporti delle amministrazioni generali dello Stato con quella del R. Istituto de' Sordo-Muti di Genova: relazione*, Genova, Tipografia del R. I. de' sordo-muti, 1873, pp. 6-7.

¹⁵ G. Bertolani, *Elogio funebre del professore Maurizio Francesco Benza*, Cremona, Tip. Manini, 1841, p. XVI. Il concetto veniva ribadito in una lettera del 29 agosto 1841, indirizzata al Padre Generale delle Scuole Pie, Giovanni Battista Rosani: «Mi compiacchio – scriveva Benza in

Alla caduta dell'impero napoleonico, nuovi ostacoli rischiavano di comprometterne la sopravvivenza: dalla mancata corresponsione dell'assegno governativo, con una conseguente penuria dei mezzi di sostentamento, alla posizione critica assunta da alcuni cittadini che ne invocavano la chiusura alla luce di un'erronea identificazione tra l'esperienza educativa per sordomuti e la dominazione francese sul territorio. Il pericolo fu scongiurato grazie all'azione del marchese Gerolamo Serra che, non curante di queste voci, riuscì ad ottenere dalla repubblica ligure un sussidio provvisorio e l'impegno a presentare un progetto volto ad assicurare la prosecuzione dell'iniziativa¹⁶. Furono però le disposizioni di Vittorio Emanuele I di Savoia, sovrano della regione per volontà del Congresso di Vienna, a offrire le opportune garanzie ai fini della sicurezza economica e del conferimento di un assetto stabile e definitivo alla scuola. Il 21 maggio 1816 il re sabauda individuava in 14,700 franchi la cifra necessaria per sopperire alle esigenze finanziarie (stipendi al personale, copertura dei posti gratuiti): tre quarti a carico dell'erario, l'ultima parte destinata a gravare sul comune di Genova che, in quello stesso anno, aveva iscritto in bilancio una somma di 4,000 franchi in favore di Assarotti. Le Regie Patenti del 16 gennaio 1818, nell'approvare il regolamento organico, legittimarono, a tutti gli effetti, l'esistenza e l'importante ruolo svolto dall'istituto a beneficio dei sudditi non udenti.

Il confronto con il precedente documento, redatto all'epoca del governo d'oltralpe, denota da un lato una più convinta adesione al progetto, dall'altro una minore ingerenza nella gestione didattica. Se è vero, infatti, che gli allievi mantenuti dallo Stato passano da 12 a 18 (11 maschi, 7 femmine) con un aumento delle spese pari a 3 mila franchi, è altrettanto vero che l'attribuzione del titolo regio non rappresentava, da parte della dinastia sabauda, un semplice atto di patrocinio o di benevola protezione ma un prestigioso riconoscimento di fiducia e di stima, manifestato in più occasioni anche negli anni successivi. Altrettanto interessante appare la scelta di ridurre gli articoli da 51 a 37 con un più ampio margine di discrezionalità per il direttore in ordine alla durata, agli orari e al programma di studi: vago è il riferimento al periodo di permanenza nel convitto (*Gli allievi rimarranno nell'Istituto finché sia compiuta la loro educazione, o che siano richiamati dalle famiglie*) così come scompare l'elenco delle discipline e la loro suddivisione in rigide fasce temporali¹⁷. Nel 1820 i

riferimento ad Assarotti – di averlo assecondato e sostenuto nella grande impresa da lui assunta dell'educazione dei sordi, e muti» (L. Picanyol, *Il primo apostolo dei sordomuti in Italia: Ottavio Assarotti delle Scuole Pie*, Roma, Curia generalizia, 1941, pp. 6-7).

¹⁶ Cfr. *Decreto del Governo Provvisorio Genovese per cui assegna allo Stabilimento de' sordomuti un acconto di lire 1.000 sotto il credito che lo Stabilimento medesimo ha colla Francia, e inoltre gli anticipa un soccorso di lire 4.000* (19 settembre 1814), in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118. Sull'importante ruolo svolto dal marchese Serra si veda il già citato lavoro di Picanyol alle pagine 7 e 8.

¹⁷ RR. PP. *colle quali S.M. il Re di Sardegna, aumentando sei posti gratuiti nell'Istituto Reale de' Sordo-muti, approva il Regolamento per l'Amministrazione del medesimo* (16 gennaio 1818),

posti gratuiti erano destinati a salire a venti grazie alla decisione del consiglio comunale di Genova di pagare la pensione a due non udenti poveri della città. Si trattava di un'iniziativa lodevole ma insufficiente a fronte delle sempre più numerose domande di ammissione provenienti anche da zone non limitrofe del capoluogo. D'altra parte considerevole era il numero, tra gli abitanti del regno, di persone colpite da questo *deficit* sensoriale: la maggior parte, appartenente alle classi popolari, non disponeva delle risorse economiche per godere dei benefici dell'istruzione. Si comprende, pertanto, la volontà del padre scolio di cercare strategie e soluzioni in grado di rispondere in maniera più adeguata alle esigenze di una così ampia classe di soggetti svantaggiati.

2. *Un disegno ambizioso*

Il 13 ottobre 1821 il religioso ligure presentò una proposta finalizzata all'apertura di una scuola esterna che, distinta in due sezioni (maschile e femminile), era rivolta ai sordomuti poveri dello stato sabaudo impossibilitati ad accedere come allievi al Regio istituto: aveva individuato nella munificenza del sovrano, nella generosità di privati cittadini, nel contributo dei comuni e nell'imposizione di una tenue tassa ai genitori in grado di pagarla i possibili mezzi per finanziare l'opera¹⁸. In una successiva versione del progetto, più completa e articolata, ne aveva ipotizzato una sede in ciascuna delle otto divisioni amministrative del regno: i costi erano sostenuti dalle province che ne facevano parte a copertura delle spese dei propri abitanti iscritti alla scuola¹⁹. La volontà di favorire una presenza sul territorio era subordinata al reperimento di almeno una trentina di docenti: Assarotti si era, però, dichiarato disponibile a fornire ai futuri colleghi le prime cognizioni del metodo. D'altra parte non si trattava di una prassi inconsueta: presso di lui si erano già formati i primi due direttori dell'istituto milanese (gli abati Carlo De Bonis e Giuseppe Bagutti)²⁰,

in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118, p. 5. «La gazzetta di Genova» del 28 gennaio dava conto ai lettori delle principali disposizioni del provvedimento, indice delle «paterne sollecitudini» del sovrano nei confronti dei sudditi più deboli e indifesi.

¹⁸ Il documento, reperito all'interno del succitato mazzo, ha come titolo *Erezione e Regolamento di una Scuola per istruire nei doveri almeno della Religione i Sordo-muti mancanti delle qualità prescritte ad esserlo in Allievi nel Reale Istituto di questa classe*.

¹⁹ Cfr. *Progetto del P. Ottavio Assarotti per l'apertura di Scuole per Sordo-muti maschi e femmine in ogni Città Capo Divisione del Regno* (8 giugno 1823), nell'appendice *Documenti* del testo di Monaci, *Storia dell'Istituto nazionale per i sordomuti in Genova*, cit., pp. CXXVI-CXXIX.

²⁰ De Bonis aveva soggiornato all'istituto di Genova dal dicembre 1816 al luglio del 1817; il successore Bagutti dall'ottobre del 1820 all'aprile del 1821. Quest'ultimo, sacerdote e archivista alla congregazione di carità a Milano, aveva già manifestato una particolare sensibilità per le questioni educative come testimoniano alcuni suoi scritti relativi alla cura dell'infanzia e i soggiorni all'estero per visitare le realtà scolastiche più accreditate. Fu anche autore dell'opera *Su lo stato*

don Matteo Marcacci, responsabile dell'educazione dei sordomuti a Pisa²¹, e il nobile Celso Bargagli Petrucci, tra i fondatori, insieme al professore Stanislao Grottanelli e al più noto Tommaso Pendola, della scuola convitto di Siena per non udenti²².

Il programma verteva su un sapere di carattere pratico: dall'acquisizione delle abilità della lettura e della scrittura allo svolgimento delle prime operazioni aritmetiche; dall'assunzione di un'adeguata condotta morale (*costumatezza nel vivere, decenza del tratto, onestà in qualsiasi portamento*) all'espressione di sentimenti di rispetto e fedeltà nei confronti delle autorità politiche e civili. Centrale era la dimensione religiosa che comprendeva lo studio delle verità di fede e dei precetti della chiesa, l'esercizio delle virtù cristiane e le pratiche devozionali. La semplicità e la limitatezza dei contenuti sorprendono se poste a confronto con l'ampia preparazione di cui avevano più volte dato prova gli alunni del convitto durante i pubblici saggi: si pensi a quello del 1822 in cui risposero a domande sulla storia delle principali case regnanti europee (italiane, francesi, spagnole, tedesche, inglesi) nella loro lingua madre²³. La notevole sproporzione si spiega, almeno in parte, con il diverso numero di ore giornaliere dedicate all'attività didattica: quattro nel primo caso, almeno nove nel secondo senza contare i momenti di ricreazione e di vita comune, destinati comunque a costituire un'occasione di apprendimento.

È curioso notare come dalle parole del padre scolopio non emerga alcun cenno all'iniziativa che, promossa a Torino nel 1819 dal laico Giovanni Battista Scagliotti, era accomunata dal medesimo fine: coadiuvato dalla moglie e dal teologo Sineo, l'educatore vercellese aveva predisposto per i propri allievi privi d'udito un ampio piano di studi, destinato a spaziare, nell'arco di sei anni, dalla religione all'insegnamento della morale, dalla storia alla geografia, dall'aritmetica alla geometria, dal disegno alla ginnastica²⁴. Sembra inverosimile ipotizzare che il religioso ligure non ne fosse informato: anch'essa, infatti, aveva

fisico intellettuale e morale dei sordomuti e del loro insegnamento (1828). Per ulteriori notizie si veda G.B. Ceroni, *Il Regio Istituto Nazionale di Milano e l'opera dell'ab. Bagutti*, Milano, Bocca, 1900.

²¹ Nell'aprile del 1819 l'abate Marcacci era subentrato a Buffetti alla guida dell'istituto di Pisa, sorto due anni prima: all'indomani della nomina era partito alla volta di Genova instaurando con Assarotti un rapporto alimentato, nel tempo, dallo scambio epistolare.

²² Nel 1822 il nobile senese aveva cominciato a istruire privatamente alcuni sordomuti: l'anno successivo aveva avuto la possibilità, grazie a una lettera di presentazione di padre Massimiliano Ricca, di incontrare il religioso ligure e di assistere quindi, in prima persona, all'applicazione del metodo da lui adottato.

²³ Cfr. *Alla sacra reale maestà di Carlo Felice. Saggio accademico dei sordo-muti allievi dell'Istituto di Genova* (22 maggio 1822), Genova, Stamperia Gravier, 1822. Queste cinque lingue furono utilizzate dagli alunni della classe superiore anche nel saggio del 1824 per rispondere, alla presenza del re e della regina, a trentasette quesiti sulle origini e sulla composizione dell'universo.

²⁴ Sulle complesse vicende legate all'istituzione della scuola di Scagliotti cfr. M.C. Morandini, *L'istruzione dei sordomuti a Torino nell'Ottocento*, in Sani (ed.), *L'educazione dei sordomuti nell'Italia dell'800. Istituzioni, metodi, proposte formative*, cit., pp. 43-48.

sede nel regno sabauda e riceveva un finanziamento, seppur minimo (1.000 lire portate poi a 1.500), dal re Carlo Felice. Si trattava, inoltre, di un ambito ancora scarsamente esplorato e quindi circoscritto a pochi istitutori in costante contatto tra loro attraverso scambi epistolari e visite presso le rispettive strutture: ne sono un chiaro esempio le lettere del barone Joseph Marie de Gérando e le circolari dell'istituto dei sordomuti di Parigi da cui si evince la conoscenza, in Francia, di entrambe le esperienze subalpine²⁵. Se è vero che la scuola avviata nel capoluogo piemontese si configurava fin dall'inizio, agli occhi dell'opinione pubblica, come una realtà provvisoria dal futuro incerto, è altrettanto vero che le difficoltà incontrate nell'accidentato cammino (ricerca dei locali e reperimento dei fondi) erano le stesse con cui si era misurato, soprattutto nei primi anni, l'abate Assarotti. In ogni caso, sarebbe stato preferibile investire in un'istituzione già esistente, seppur instabile e precaria, piuttosto che in un progetto *ex novo*.

Appare quindi evidente che le ragioni del silenzio vadano ricercate altrove con riferimento, nello specifico, alle scelte in materia didattica. Scagliotti, formatosi nella capitale asburgica sotto la guida del May, era fautore di un sistema che affiancava alla mimica il linguaggio verbale²⁶. Non tralasciava, infatti, di porre l'accento, nei suoi scritti, sulla pluralità di benefici che derivano al soggetto sordomuto dall'acquisizione della parola: fisici con la prevenzione di malattie causate da ristagni nella zona polmonare; cognitivi grazie ai notevoli progressi assicurati sul piano dell'ortografia e della concatenazione logica del pensiero; sociali perché in grado di favorire il contatto con un ampio numero di persone (in un periodo caratterizzato da elevati tassi di analfabetismo la scrittura non rappresentava un altrettanto efficace strumento di integrazione)²⁷. Non è da escludere che sulla successiva decisione di Carlo Alberto di preferire don Francesco Bracco a Scagliotti alla guida della Regia Scuola normale di Torino, aperta nel 1834 per istitutori di non udenti, abbia influito, in parte, anche il rapporto instaurato dal sacerdote alessandrino con Assarotti quando nel 1829 cominciò a istruire ad Acqui un piccolo gruppo di sordomuti²⁸.

²⁵ L'esperienza di Scagliotti era conosciuta addirittura oltre oceano: nel 1822, infatti, il ministro americano Woodbridge aveva offerto all'educatore vercellese l'incarico di direttore all'Istituto di Hartford nel Connecticut.

²⁶ Sul metodo utilizzato da Scagliotti cfr. T. Pendola, *Le istituzioni dei sordomuti in Italia*, Siena, Porri, 1867, p. 119; G. Ferreri, *Il sordomuto e la sua educazione*, Siena, Tip. San Bernardino, 1896, pp. 288-289; Morandini, *L'istruzione dei sordomuti a Torino nell'Ottocento*, cit., pp. 53-57; Ead., *La conquista della parola. L'educazione dei sordomuti a Torino tra Otto e Novecento*, Torino, Sei, 2010, pp. 27-28.

²⁷ G.B. Scagliotti, *Cenni storici sulle istituzioni de' sordi-muti e de' ciechi*, Torino, Stamperia reale, 1823, pp. 31-33.

²⁸ La rivalità con Genova non costituì l'unico fattore destinato a penalizzare l'istitutore vercellese: decisiva al riguardo fu, infatti, la volontà del sovrano di ricorrere, per la direzione della scuola, alle congregazioni religiose e, in subordine, al clero in linea con gli orientamenti che caratterizzarono la politica dell'età carloalbertina nei settori della beneficenza e dell'istruzione. Per una puntuale ricostruzione della storia umana e professionale di Scagliotti si veda, oltre ai testi

Al termine di un triennio, caratterizzato da diverse proposte di modifica al progetto e da un lungo e fitto carteggio tra la regia segreteria degli affari interni, la direzione dell'istituto, la deputazione degli studi e le autorità ecclesiastiche della diocesi, il sovrano autorizzò l'apertura in Genova di una scuola esterna gratuita per non udenti rivolta agli alunni e alle alunne domiciliati nei sei quartieri della città. Il corso, finanziato dal consiglio municipale con lo stanziamento annuo di lire 500, doveva avere inizio l'8 aprile 1824 per i maschi e il 22 per le femmine, secondo un programma che riproponeva, nella sostanza, quello precedentemente formulato²⁹; erano incaricati dell'insegnamento il ripetitore (don Carlo Richelmi) e la ripetitrice (Serafina Grego) in servizio presso l'istituto, affiancati da un sordomuto (Luigi Armirotti) e da una sordomuta (Rosa Maggi)³⁰. Non era stata del tutto abbandonata l'ipotesi di un'utenza più ampia: nell'articolo ottavo del regolamento era contemplata la presenza di allievi provenienti da altri «Comuni di qualunque Provincia dei Regj Stati [...] ammessi, mediante concorrenza alle spese, o per parte delle rispettive Provincie o per parte dei particolari, siano Parenti, siano Benefattori»³¹.

Si trattava, in ogni caso, di un evidente ridimensionamento di prospettiva, riconducibile a una pluralità di fattori: alla convinzione, alimentata dal moto del 1821, della pericolosità sociale insita nella più ampia opera di diffusione dell'alfabeto tra i fanciulli delle classi popolari si affiancavano, infatti, preoccupazioni di carattere finanziario e forti riserve espresse dalla curia. Solo un ristretto numero di beneficiari poteva consentire – si sottolineava a più riprese – di contenere le spese di primo impianto e quelle di mantenimento entro la cifra di 4.650 lire in considerazione anche del fatto che gli amministratori dell'ente, contrari all'imposizione di una tassa, non disponevano delle risorse necessarie né erano stati in grado di suggerire mezzi economici adeguati. Esplicite al

citati, M.A. Pirello, *G.B. Scagliotti e l'istruzione dei sordomuti a Torino nel primo Ottocento*, Tesi di laurea, Università degli Studi di Torino, Facoltà di Magistero, a.a. 1992-1993, pp. 94-249. Sull'esperienza di don Bracco come direttore della Regia Scuola Normale di Torino cfr. Morandini, *La conquista della parola. L'educazione dei sordomuti a Torino tra Otto e Novecento*, cit., pp. 3-17.

²⁹ I giorni di frequenza differivano in base al sesso: le mattinate di lunedì, mercoledì e venerdì erano riservate ai sordomuti; quelle di martedì, giovedì e sabato alle sordomute. All'atto dell'iscrizione venivano richiesti: la fede di battesimo, un certificato di domicilio nel comune, un attestato medico comprovante la sordità e una serie di documenti relativi alla vaccinazione contro il vaiolo, alla sana costituzione e all'assenza di *deficit* di natura intellettuale.

³⁰ Don Carlo Richelmi e Serafina Grego insegnarono per oltre un cinquantennio nell'opera avviata da Assarotti: il primo dal 1817 al 1869; la seconda dal 1812 al 1866. Armirotti Luigi, originario di Sampierdarena, aveva cominciato a frequentare l'istituto nel 1815, in qualità prima di esterno, poi di interno: dal 1824 al 1840 figura tra gli allievi applicati alle arti come «legatore di libri». Rosa Maggi, nata a Genova, era stata accolta nel convitto nel 1812: dal 1824 al 1874 fu impiegata nel ruolo di sotto-maestra.

³¹ *Regolamento per la scuola esterna* (29 marzo 1824), in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118, p. 2. Gli alunni non residenti a Genova, destinati a rappresentare la maggioranza della popolazione scolastica, erano considerati esterni solo rispetto al convitto perché ospitati, a pagamento, nel cittadino Albergo dei Poveri.

riguardo sono le considerazioni di Nicolò Grillo Cattaneo e di Domenico De Marini nella relazione compilata su incarico della Deputazione degli studi:

[La] munificenza del sovrano può certamente essa sola supplire al bisogno. Ma non si deve impegnare questa straordinaria risorsa, se non nel caso, che vi fossero altri mezzi ordinarij, onde ricavare il necessario. La liberalità degli amici dell'umanità non può somministrare risorsa sicura, ed ordinaria; mentre ché le dotazioni di uno stabilimento vogliono essere fisse e permanenti. Quanto alle sovvenzioni delle Comuni difficilmente si troverà, che ve ne sia alcuna, che abbia degli avanzi, su dei quali poter distogliere, con sicurezza, una tal sovvenzione, e la città di Genova, che potrebbe forse somministrare un qualche discreto sussidio ha di già nel suo causato annuale una considerabile assegnazione, a favore dell'Instituto dei Sordi e Muti³².

Nemmeno la parte relativa ai doveri di religione era esente da critiche. L'arcivescovo Luigi Lambruschini, in una corrispondenza riservata, aveva evidenziato l'emergere, tra le righe, di una dottrina che poteva apparire 'sospetta'. Nello specifico denunciava la tendenza a favorire una modalità di preghiera che, volta a distaccare i giovani sordomuti dalle «pratiche preziose della cristiana pietà, sotto il pretesto di sbarazzarle dalle superstiziose materialità», rischiava di inaridire i cuori³³. Chiaro è il riferimento alle simpatie giansenistiche manifestate da Assarotti e da alcuni sacerdoti suoi collaboratori: il maestro Luca Agostino Descalzi³⁴ e Eustachio Degola³⁵, responsabile dell'educazione religiosa degli allievi e membro della commissione amministrativa. Non sorprende, quindi, la richiesta del prelado di sottoporre alla sua personale approvazione la nomina del corpo docente e la scelta del catechismo e dei libri di morale e di pietà in uso

³² *Giudizio Deputazione degli studi* (28 febbraio 1822), *ibid.*, p. 4.

³³ *Ibid.*, p. 6. Tra i numerosi documenti, presenti nell'archivio torinese, non figura il testo della lettera dell'arcivescovo. L'attribuzione del virgolettato è però certa dato che i commissari trascrivono puntualmente in corsivo le espressioni usate da Lambruschini. Il monsignore si riferisce, nello specifico, al seguente passaggio della proposta di Assarotti: «[Gli allievi] si instruiranno nello scrivere e nel leggere, giacché questo è il solo mezzo per cui possono loro svolgersi le facoltà intellettuali, senza le quali è impossibile di avere le idee religiose nella loro verità, con la dovuta chiarezza e libere dalla confusione in cui cerca di imbarazzarle la superstiziosa materialità» (*Erezione e Regolamento di una Scuola per istruire nei doveri almeno della Religione i Sordomuti mancanti delle qualità prescritte ad esserlo in Allievi nel Reale Istituto di questa classe* [13 ottobre 1821], cit., pp. 1-2).

³⁴ Luca Agostino Descalzi (Chiavari, 1765-Genova, 1840): ordinato sacerdote, si dedicò all'insegnamento nelle scuole per i bambini poveri. Collaboratore del periodico giansenista *Annali politico ecclesiastici*, guidò il giovane Mazzini nei quattro anni del corso di grammatica. Nel 1818 fu assunto come insegnante all'istituto dei sordomuti, incarico che mantenne fino al 1829. Trascorse i suoi ultimi anni nello studio dell'archeologia e della numismatica. Per ulteriori notizie si veda G. Assereto, *Descalzi Luigi Agostino*, in DBI, Vol. IXL (1991), pp. 339-341.

³⁵ Sul sacerdote genovese, nota figura del clero giansenista ligure, cfr. M. Caffiero, *Degola Eustachio*, in DBI, Vol. XXXVI (1988), pp. 178-186 ed Codignola, *Carteggi di giansenisti illustri*, cit., Vol. I, pp. CIII-CIX e CCLI-CCLIX; Vol. III, pp. 103-563.

nella scuola; richiesta prontamente accolta dalla deputazione degli studi come si evince dal testo del nuovo regolamento sottoposto all'esame dell'ente³⁶.

Erano modifiche destinate a suscitare pareri discordanti: a una risposta ufficiale, sottoscritta all'unanimità dai consiglieri, in cui si accettano tacitamente gli articoli in oggetto, si contrappone, infatti, una lettera del religioso ligure che esprime forti riserve, consapevole del carattere peculiare dell'insegnamento rivolto ai non udenti e, quindi, del possesso di specifiche competenze richiesto per operarne una corretta ed efficace valutazione. Altrettanto interessante è il passaggio in cui il padre scolopio ricostruisce le dinamiche maturate durante la seduta plenaria, indice di una netta divisione e di un clima caratterizzato da scarsa fiducia:

Tre dei membri diedero quanto basta a conoscere che si erano sul punto controverso previamente accordati. Dissero che sarebbe andare contro alla mente del Governo l'opporvi: che è bene abbiano i vescovi il vigilare sulla istruzione e su di coloro che devono istruire [...]. Ripigliai io, non essere mia intenzione contrariare al Governo, ma che il Governo nulla ha ancora decretato, e che domanda riflessioni sovra quello che si dispone a decretare, [che] bisogna alle sue domande rispondere con previdenza e con esattezza. Comunque io ed un altro collega (mancava il sesto) sul punto in questione rispettosamente tacquimo; e si notò agli articoli 4° e 5° *nulla*³⁷.

D'altra parte la libertà e il tono confidenziale con cui Assarotti invita il primo segretario di Stato a prendere in considerazione le sue obiezioni e a impegnarsi a sostenerle, se riconosciute valide, testimoniano l'esistenza, con le autorità politiche, di un rapporto diretto e privilegiato che trascende il momento della discussione all'interno del consiglio. Tra i documenti d'archivio non figura nessun riscontro a tale richiesta: non siamo, quindi, in grado di conoscere la posizione assunta al riguardo dal governo. Il confronto tra le diverse versioni del regolamento, compresa quella definitiva del 1824, induce tuttavia a ritenere che, ad alto livello, sia stata svolta un'opera di mediazione: se è vero che dall'iniziale ampia e dettagliata formulazione dei contenuti della dottrina cristiana e degli atteggiamenti destinati a caratterizzare la vita di fede si passa a poche e generiche righe in cui scompaiono le 'tracce' di giansenismo (*istruiti nei misteri della Nostra Religione, nella Divina Legge, nei precetti della Chiesa, ne' mezzi della Nostra Santificazione, nel culto di spirito e verità*)³⁸, è altrettanto vero che la proposta di supervisione da parte del vescovo è destinata a decadere.

³⁶ Si vedano, al riguardo, i punti cinque e sei della bozza. Cfr. *Giudizio Deputazione degli studi* (28 febbraio 1822), cit., p. 9.

³⁷ *Lettera al primo segretario di Stato per gli Affari interni* (6 aprile 1822), in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118, pp. 2-3. Sulla base delle firme poste in calce al documento è ragionevole presumere che il collega di cui Assarotti tace il nome sia l'amico fraterno Eustachio Degola.

³⁸ *Regolamento per la scuola esterna* (29 marzo 1824), cit., p. 2.

Non mancarono, nemmeno, pressioni e tentativi d'ingerenza da parte della congregazione, denunciati con amarezza dall'«apostolo dei sordomuti» in una lettera al conte De Cholet. Fin dalle prime righe egli descrive, in modo preciso e puntuale, la strategia messa in atto dai confratelli: dall'invio di richieste anonime per essere assunti in qualità di collaboratori al ben più ambizioso progetto volto a ottenere la gestione e il controllo della scuola convitto. Il religioso ligure, «accertato da canali sicuri, non che da fatti positivi», illustra, con dovizia di particolari, le fasi del piano:

Essi brigano di ottenere da Torino, che sia devoluto loro l'Instit.o de' sordo-muti, avendo indotto altro de' miei collaboratori a farsi scolopio, per il quale oggetto hanno scritto a Roma, onde otternergliene la vestizione, col permesso di fare la Professione religiosa nel Locale destinato sovraneamente per l'alloggio de' Sordo-muti, ed in questo farvi il suo Noviziato, ed alloggiarvi finché dal suo superiore scolopio, non venisse destinato altrove; condotta assolutamente irregolare, e tendente non al bene dell'Instituto Sordo-muti, bensì ad imbarazzarlo, e quanto prima a distruggerlo³⁹.

La volontà di preservare l'esperienza educativa da qualsiasi forma di speculazione lo indusse addirittura a chiedere al sovrano, per il bene dei sordomuti e nel rispetto della propria coscienza, di non concedere a «nessuna società, congregazione, compagnia o corporazione religiosa di sacerdoti regolari, frati, monaci, o chierici di qualunque siasi istituzione ed appellazione [...] la proprietà, o parte alcuna alla Direzione, all'istruzione, né alla sorveglianza dei sordo-muti del R.o Instituto di Genova»⁴⁰. In assenza della risposta, non è possibile ipotizzare le ragioni che abbiano sconsigliato alle autorità politiche l'adozione di tale norma. La fondatezza dei timori del padre scolopio è comprovata almeno in parte, come avremo occasione di vedere, dai fatti successivi alla sua morte.

I programmi dei saggi pubblici, svolti dai convittori e dagli esterni⁴¹, offrono interessanti spunti per una riflessione sui criteri sottesi al metodo. La volontà di predisporre interventi educativi in stretta correlazione con le attitudini, l'intelligenza e le conoscenze dell'allievo non escludeva, infatti, il ricorso a principi universalmente validi: in primo luogo l'idea di un apprendimento graduale che, basato sull'esperienza, faceva leva sull'intuizione dei fanciulli applicata ai dati della realtà nel rispetto delle leggi naturali dello sviluppo. Allo studio delle regole grammaticali era quindi anteposta, nell'insegnamento

³⁹ *Lettera di Assarotti al Conte Rogex de Cholet* (4 luglio 1827), in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118, p. 1.

⁴⁰ *Ibid.*, p. 3.

⁴¹ Il primo saggio degli alunni e delle alunne della scuola esterna ebbe luogo nel 1825: in esso risposero, in forma scritta e attraverso i gesti, a una serie di domande sulle «cognizioni necessarie», rispettivamente, alla donna e all'uomo con particolare riferimento ai contenuti della religione cattolica. Erano presenti sovrani italiani e stranieri: i re di Sardegna e di Napoli, il Granduca di Toscana, il duca di Modena e l'imperatore austriaco. Un breve resoconto dell'evento è pubblicato sulla «Gazzetta di Genova» del 4 giugno di quello stesso anno.

delle lingue, la traduzione di semplici proposizioni: i vocaboli appresi venivano poi utilizzati per comporre nuove frasi più complesse. Fra i numerosi esercizi proposti due sono quelli che, in particolare, denotano l'originalità e l'efficacia del sistema introdotto da Assarotti. Il primo consiste nella scrittura di un breve pensiero con lettere desunte da nomi di persone e di oggetti o da definizioni di argomento vario; una prova molto simile alla soluzione di una sciarada che metteva in evidenza la profonda cultura dei convittori⁴². Il secondo, volto a riunire in un periodo logico parole senza alcun nesso fra loro, presupponeva, oltre alla mera erudizione, il possesso di capacità cognitive elevate, riscontrabili a fatica anche tra gli udenti⁴³. Si spiegano, così, lo stupore e l'ammirazione manifestati da don Severino Fabriani durante la visita, nel 1825, all'istituto genovese: in una lettera, rivolta alla maestra delle sordomute di Modena, il sacerdote utilizza l'aggettivo «confuso» per esprimere lo stato d'animo suscitato in lui dalla constatata padronanza linguistica degli alunni alla luce anche del ricco e articolato piano di studi⁴⁴. L'estensione dei contenuti è giustificata, almeno in parte, dalla costante preoccupazione di dimostrare l'infondatezza del pregiudizio, ancora diffuso, circa l'impossibilità di istruire i sordomuti.

Non è difficile ravvisare punti di contatto con il modello aportiano, destinato a incidere sulle riforme piemontesi in materia d'istruzione durante il decennio antecedente l'Unità⁴⁵: il concetto della gradualità improntato alla valorizzazione dell'esperienza (passaggio dal semplice al complesso e dal noto all'ignoto), la centralità della cognizione pratica della lingua, l'ampiezza dei programmi. Gli

⁴² Ecco, ad esempio, le indicazioni fornite agli allievi per indurli a scrivere la parola *gelsomino*, composta da nove lettere: «Della prima dell'uno e dell'altro dei partiti politici che tanto funestarono l'Italia nei secoli XIII e XIV (Guelfi e Ghibellini); della sesta lettera del nome che si dà a quella scienza, la quale insegna le combinazioni dei numeri (aritmetica); della quinta lettera del nome di quel personaggio, che prima fu console e poscia imperatore dei Francesi (Napoleone); della terza lettera del nome di quel cittadino che primo fondò in Genova l'ospedale per gli ammalati (Boasco); della settima lettera del nome di quell'Ateniense che distrusse la flotta dei Persiani a Salamina (Temistocle); della prima lettera del nome che si dà a quella massa d'acque che bagna l'Italia, la Francia, ecc. (Mediterraneo); della seconda lettera del nome che ha un corso perenne d'acqua (fiume); della quarta lettera del nome di quel genovese, che fu promotore e fondatore dello spedale degli incurabili (VerNazza); della terza lettera del nome che aveva presso i Pagani il re degli dei (Giove)». Cfr. Monaci, *Storia dell'Istituto nazionale pei sordomuti in Genova*, cit., pp. 82-83.

⁴³ Per ulteriori approfondimenti si veda l'Appendice sul metodo particolare del P. Assarotti per l'insegnamento grammaticale, in L.A. Boselli, *Sui sordo-muti: sulla loro istruzione ed il loro numero. Memoria del Direttore del Reale Istituto di Genova*, Genova, Tip. Y. Gravier, 1834, pp. 89-98. Numerosi spunti sono contenuti anche nelle *Ossezzazioni sull'insegnamento della grammatica*, tre articoli, sempre a firma di Boselli, pubblicati sulla rivista «L'educatore» nel 1847 (pp. 321-333, 481-490 e 609-619).

⁴⁴ L'episodio è riferito da R. Sani e P.P. Saladini nel volume *Severino Fabriani: un ecclesiastico ed educatore nella Modena della restaurazione*, Roma, Città nuova, 2001, pp. 46-47.

⁴⁵ In merito al ruolo svolto da Aporti nella diffusione degli asili in Piemonte e nell'avvio della scuola di metodo a Torino cfr. M.C. Morandini, *Scuola e nazione. Maestri e istruzione popolare nella costruzione dello Stato unitario (1848-1861)*, Milano, Vita e Pensiero, 2003, pp. 20-26 e 35-44; Ead., *Tra pubblico e privato. Carlo Boncompagni educatore e ministro*, Milano, Educatt, 2012, pp. 10-19.

elementi comuni tra le due esperienze non sorprendono se si considera che la proposta educativa di Assarotti si colloca all'interno del più ampio processo di rinnovamento metodologico e curriculare avviato, in quegli stessi anni, nelle scuole Pie della Liguria rette da scolopi di tendenze gianseniste: si pensi, ad esempio, all'introduzione a Carcare, fra le classi elementari e il ginnasio, di un corso di lingua nazionale, ispirato alle teorie di padre Girard⁴⁶. D'altra parte non mancano le testimonianze dell'esistenza di un rapporto diretto con l'abate cremonese come attesta l'incontro avvenuto, tra i due, nel 1828 a Genova: un confronto, proseguito nei mesi successivi, attraverso uno scambio epistolare con Boselli, subentrato, nel frattempo, al compianto maestro⁴⁷.

Dal 1801 al 1828, ultimo anno della gestione di Assarotti, furono istruiti 141 sordomuti: 45 femmine, 96 maschi. La trasformazione da semplice iniziativa privata a realtà economicamente sostenuta dal governo incise positivamente sul numero degli allievi: nel solo 1812 se ne contano 14 a fronte dei 13 complessivi del periodo precedente. L'apertura della scuola esterna, nel 1824, costituì un'altra occasione per incrementare il bacino di utenti: ben 28 furono, infatti, gli ingressi nell'anno della sua inaugurazione. Le sordomute cominciarono a frequentare i corsi nel 1812: dalle 6 iscrizioni iniziali, accresciute in maniera discontinua di qualche unità nel decennio successivo⁴⁸, si passa alle 12 del 1824 in concomitanza con l'avvio dell'esperienza priva di convitto. Nella quasi totalità dei casi (128 su 141)⁴⁹ è stato possibile stabilire la provenienza geografica: elevata risulta la percentuale (51,5%) dei residenti nel capoluogo ligure e nelle sue diverse frazioni (Sampierdarena, S. Fruttuoso, Crevari, Morego, Struppa); il tasso è destinato a salire ulteriormente se esteso ai comuni della regione (63,2%). La proporzione è addirittura superiore ai 2/3 in riferimento al territorio del regno subalpino: agli 81 alunni liguri si aggiungono, infatti, i 20 piemontesi, i 4 sardi e i 3 della Savoia per un totale di 108 (84%,3). Le altre zone della penisola rappresentate sono quelle confinanti: la Lombardia, l'Emilia, la Toscana⁵⁰.

⁴⁶ Il direttore dell'istituto, Domenico Maurizio Buccelli, aveva visitato la scuola di Friburgo e letto le opere di padre Girard: alle *Lezioni di lingua materna* si era ispirato, nello specifico, per la stesura della *Ragion della lingua per le prime scuole, esposta da un individuo delle Scuole Pie*, edita a Torino nel 1820. Sugli stimoli offerti in ambito educativo dagli scolopi liguri di orientamento giansenista cfr. Codignola, *Carteggi di giansenisti illustri*, cit., Vol. I, pp. CCXXXVII-CXLVIII.

⁴⁷ Alcune lettere sono pubblicate in A. Gambaro, *Ferrante Aporti e gli asili nel Risorgimento*, Torino, presso l'autore, 1937, Vol. II, pp. 615-617, 635-637, 644-647, 650 e 653-654.

⁴⁸ Si registra, infatti, un andamento oscillante nelle ammissioni delle allieve: una nel 1813; zero dal 1814 al 1816; una nel 1817; sei nel 1818; due nel 1819; una nel 1820; tre nel 1821 e nel 1822; una nel 1823. I dati sono stati desunti dall'*Elenco cronologico degli alunni e delle alunne dall'anno di fondazione della scuola (maggio 1801)*, in Monaci, *Storia dell'Istituto nazionale pei sordomuti in Genova*, cit., pp. CCIII-CCVI.

⁴⁹ In otto casi non è presente alcun riferimento al paese di origine; negli altri cinque il nome della località indicata o è generico (consente quindi più attribuzioni) o non compare negli attuali elenchi di comuni e frazioni. Le percentuali saranno calcolate, pertanto, in rapporto a un totale di 128 allievi.

⁵⁰ Tra gli alunni figurano anche due sordomuti stranieri: uno africano e l'altro inglese, iscritti,

Interessante, in termini quantitativi, è anche la relazione tra interni ed esterni: il 62% del totale dei non udenti aveva eletto l'istituto a sua abituale dimora (circa il 10% aveva optato per questa soluzione durante il percorso di studi)⁵¹. Nel caso delle allieve si arriva a sfiorare il 100%: delle 23 ammesse tra il 1812 e il 1823 solo una, infatti, figura come esterna; se si considera che 11 vivevano a Genova appare evidente l'incidenza di una mentalità incline a ritenere la donna debole e fragile e, quindi, oggetto di una particolare azione di tutela e di protezione. Dall'anno successivo si registra una generale inversione di tendenza, esito della scelta, più volte richiamata, di promuovere un'iniziativa che non prevedesse, nello stesso luogo, la forma dell'internato: non è un caso che dei successivi 54 iscritti appena 18 fossero quelli ospitati nella struttura.

3. *Una pesante eredità*

Nel 1828 il religioso ligure, cagionevole di salute fin dalla giovane età, si ammalò gravemente⁵²: fu chiamato a farne le veci, Luigi Boselli, prete di appena trent'anni, di orientamento cattolico-liberale, stretto e valente collaboratore del padre scolio dal lontano 1813⁵³. La commissione amministratrice, preso atto della rinuncia dell'abate Descalzi, decise, infatti, di affidare al giovane sacerdote, in maniera provvisoria, il disbrigo degli affari correnti⁵⁴. La morte di Assarotti, avvenuta il 24 gennaio 1829, pose il delicato problema della successione. Ebbero inizio manovre, abbastanza esplicite, per influenzare dall'esterno la scelta del nuovo direttore. Il nome individuato fu quello di Antonio Gatti, discepolo di Calasanzio con un'esperienza pregressa di circa un anno come istitutore di sordomuti a Genova⁵⁵. Attorno alla sua candidatura sembrarono convergere

rispettivamente, nel 1812 e nel 1816.

⁵¹ Ben 15 furono gli allievi passati, durante l'iter scolastico, dalla condizione di esterni a quella di interni. L'unica eccezione è rappresentata da Fumagalli Costantino che compì il percorso in senso contrario.

⁵² Le precarie condizioni di salute avevano già indotto, in passato, il religioso a chiedere, senza successo, di essere sollevato dall'incarico: si pensi, ad esempio, alla proposta, il 19 novembre 1820, di nominare l'abate Descalzi facente funzioni di direttore in caso di necessità oppure alla domanda di dimissioni presentata il 13 febbraio 1826.

⁵³ Sulla figura del sacerdote cfr. P. Tamagnini Piras, *Boselli Luigi*, in DBI, Vol. XIII (1971), pp. 238-240; Torlutter, *Ottavio Assarotti und sein Einfluss auf die Entwicklung der Italienischen Gehörlosenbildung im 19. Jahrhundert*, cit., pp. 144-151; D. Montino, *Boselli Luigi Antonio*, in DBE, Vol. I, p. 203.

⁵⁴ Sulle «cose importanti, dubbie o straordinarie» era, invece, tenuto a confrontarsi con il presidente, scelto a rotazione, ogni trimestre, tra i membri della commissione amministratrice. Cfr. *Estratto verbale della Seduta Vigesimaquinta della Commissione Amministrativa* (20 giugno 1828), in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118, p. 1. Bisognava però attendere il 18 ottobre perché la delibera ottenesse l'approvazione ufficiale del re.

⁵⁵ Nell'*Elenco del personale addetto all'istruzione e alla disciplina dall'epoca della sua*

i diversi interessi in campo: da un lato le pressioni della curia arcivescovile, intenzionata a 'estirpare il germe' del giansenismo che, fin dalle origini, aveva caratterizzato lo spirito dell'iniziativa; dall'altro l'aspirazione del consiglio di gestione dell'ente all'esercizio di un ruolo più incisivo e di maggiore visibilità. È sufficiente leggere quanto scrive, in forma strettamente privata, il presidente Domenico Del Carretto al primo Segretario di Stato per cogliere un senso di disagio dovuto alla consapevolezza di ricoprire un incarico del tutto marginale stante la forte e, a tratti, 'ingombrante', personalità del fondatore:

Il rispetto e la venerazione in cui teneva la R. Commissione Amministrativa del R. Istituto de' Sordo-muti il benemerito padre Assarotti suo Decano, Collega, e Fondatore di sì utile stabilimento, erano tali che lasciò sempre alle di lui vigili cure presso che la Reggenza totale dell'Istituto, della quale mostrava Egli di essere sommamente geloso. Colla morte però di sì rispettabile soggetto essendo adesso variate totalmente le circostanze, ha creduto la Commissione di non dover più continuare questo sistema, per non mancare a quella responsabilità che tiene verso il Governo, e verso se medesima⁵⁶.

L'analisi dei documenti, conservati presso l'archivio di Stato di Torino, induce a individuare proprio nel nobile genovese il regista occulto dell'operazione che, svoltasi nell'arco di quattro mesi, era finalizzata a impedire la definitiva conferma del direttore *pro tempore*. L'episodio da cui ebbe origine il contenzioso tra la commissione e Boselli, deciso a rassegnare le dimissioni⁵⁷, fu la scelta di don Antonio Rivara come maestro: il suo nominativo, proposto dal marchese, era l'ultimo di una lista in cui figuravano, per volontà dell'abate ligure, anche don Bassi e i chierici Grasso e Revello. Il problema non era rappresentato tanto dall'identità dell'aspirante prescelto, cappellano della Legazione Sarda a Costantinopoli, quanto dalle ripercussioni che tale designazione era destinata ad avere nei rapporti di forza tra il sacerdote e la commissione amministrativa. Evidente da parte di Boselli è la lettura della vicenda in termini di delegittimazione del proprio ruolo: non a caso, nella lettera del 7 marzo, richiamava l'attenzione sull'articolo settimo del regolamento del 1818 in cui si distinguono «precisamente le attribuzioni, e della Commissione, e del Direttore, assegnando alla Prima l'*amministrazione*, al secondo l'*Educazione morale e l'istruzione*»⁵⁸. Il consiglio

fondazione, pubblicato in appendice all'interno del più volte citato volume di Monaci, padre Antonio Gatti di Riva (Montenotte) figura come istitutore in seconda solo nell'anno 1812.

⁵⁶ Lettera del presidente Del Carretto al primo Segretario di Stato (9 marzo 1829), in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118, p. 1.

⁵⁷ La lettera di dimissioni, datata 1° marzo 1829, è breve ma perentoria: «Prendo la libertà incomodar S.V. Ill.ma, deg.mo Signor Presidente, per prevenirla che dietro le deliberazioni della Commissione del 27 Febb.o p.p. in concorso col R. Regolamento 1818, trovandomi incapace a seguire le orme del venerato mio Maestro, ho preso, e vado ultimando le mie misure per ritirarmi dall'impiego che ho fin qui coperto nell'Istituto del Re dalle SS. Ill.me saggiamente amministrato». Il sacerdote ligure aveva già avviato dei contatti con Ferrante Aporti per un trasferimento presso l'Istituto dei sordomuti di Cremona.

⁵⁸ Lettera di Boselli al presidente Del Carretto (7 marzo 1829), in *ibid.*, p. 1.

non riteneva, invece, sua indebita ingerenza l'esercizio di una funzione di sorveglianza sull'educazione religiosa e civile con specifico riferimento ai libri di testo e al personale insegnante tanto più alla luce del carattere provvisorio dell'incarico assunto dal fedele collaboratore di Assarotti⁵⁹. Il conflitto di competenze era, in realtà, l'esito di una difficile convivenza, caratterizzata da sospetti e da scarsa stima: se il sacerdote ligure temeva che don Rivara fosse il satellite di una corporazione religiosa, orientata ad assumere la gestione del convitto, il presidente non esitava a esprimere parere negativo sull'elezione a direttore del giovane e arrogante Boselli (*Ha tante pretese nei primi momenti che ne esercisce le incombenze*), facilmente sostituibile, a suo giudizio, con un soggetto esperto nell'educazione dei non udenti (in una lettera indirizzata al Primo segretario di Stato esplicito è il riferimento al già citato Gatti)⁶⁰.

L'impossibilità di giungere a un accordo tra le parti rese necessario l'intervento delle autorità governative. Il 27 marzo 1829 il re affidò la presidenza perpetua della commissione amministratrice all'arcivescovo di Genova a cui concesse la facoltà di delegare, in propria rappresentanza, un membro del clero⁶¹. La curia era soddisfatta perché, grazie alle nuove disposizioni, era in grado di esercitare un controllo diretto sui contenuti morali e religiosi dell'insegnamento. La novità introdotta dal sovrano ebbe però l'effetto di limitare il potere degli altri componenti del consiglio e, quindi, di indebolire il fronte dell'opposizione interna nei confronti dell'abate genovese che poteva contare sul sostegno incondizionato del marchese Gian Carlo di Negro, l'unico della commissione a conoscere la lingua dei segni e a vantare, fin dalle origini, una presenza ininterrotta nell'assetto amministrativo dell'istituto. Non sorprende, pertanto, la volontà di Carlo Felice di procedere, il 30 maggio di quello stesso anno, alla nomina effettiva di Boselli a successore del compianto «apostolo dei sordomuti»: la decisione, inoltre, di avocare a sé la scelta dei consiglieri, incarico fino ad allora di competenza del primo Segretario di Stato, poteva scongiurare il ripetersi, in futuro, di situazioni di conflitto⁶².

⁵⁹ Il presidente della commissione non esitava, infatti, a scrivere alle autorità governative: «Anche nell'ipotesi che tutto fosse dato al Direttore egli non è tale, e non so se dietro il dispaccio di V.S. Ill^{ma} in data del 18 ottobre 1828, in cui è autorizzato a farne interinalmente le veci, possa egli con ragione supporre di averne tutte le attribuzioni, come se lo fosse in effettività» (*Lettera del presidente Del Carretto al primo Segretario di Stato* [9 marzo 1829], cit., pp. 4-5).

⁶⁰ *Lettera del presidente Del Carretto al primo Segretario di Stato* (30 marzo 1829), in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118, p. 1.

⁶¹ La scelta cadde su Giovanni Battista De Albertis che, però, rinunciò all'incarico: il 13 agosto 1829 venne, quindi, nominato, in sua sostituzione, Giovanni Battista Podestà.

⁶² Si veda, al riguardo, la *Relazione a S.M.* (30 maggio 1829), sottoscritta dallo stesso sovrano, in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118. Nella monografia sull'istituto, Monaci ripercorre l'intera vicenda in termini abbastanza vaghi e approssimativi: accenna alle ripetute difficoltà e alle resistenze incontrate dal sacerdote ligure, ma evita riferimenti dettagliati a situazioni e a persone. Non rivela, ad esempio, l'identità del collaboratore non gradito a Boselli né quella di coloro che ne avversavano la nomina a direttore.

Ottenuto il pieno riconoscimento sotto il profilo istituzionale, il sacerdote ligure mise in atto una strategia per apparire, anche agli occhi del personale docente, come guida credibile e autorevole. La costante ricerca da parte del nuovo direttore dell'appoggio dei collaboratori è evidente nel richiamo alla volontà di promuovere una conduzione dell'istituto il più possibile condivisa. Emblematica al riguardo è la lettera che, rivolta al personale insegnante il 13 gennaio 1831, accompagna il *Regolamento disciplinare degli studi e della sorveglianza*. Colpiscono, in primo luogo, il tono confidenziale e l'azzeramento di qualsiasi prospettiva gerarchica: dall'*incipit* (*Amici e compagni di fatica*) alle parole conclusive (*Chi vi ama e desidera essere da voi considerato piuttosto compagno e confratello, servo ed amico, che superiore*). Esplicito appare il riferimento al principio della collegialità che, in antitesi con i criteri in precedenza adottati (*Se meno io fossi persuaso della vostra affezione all'istituto... direi come il mio Predecessore Chi vuol star stia, chi non vuole vada*), si esprime nella richiesta di pareri (*consultarvi sui mezzi più adattati a conseguire sì lodevole fine per cui il Re ci ha uniti*), nel tentativo di predisporre un ambiente sereno e gratificante (*Vorrei tutti veder contenti, e nell'altrui contento troverei un piacere che ho sempre desiderato*) nel rispetto delle esigenze di ciascuno (un calendario settimanale che per la prima volta prevedeva turni di riposo)⁶³, nella disponibilità ad accogliere proposte di modifiche e variazioni ai progetti presentati (*Se crede alcuno di voi suggerisca ancora il mezzo di meglio ripartire le cose*), nell'adesione libera e consapevole ai valori e alle norme sottese all'organizzazione del sistema scolastico e della vita quotidiana all'interno della struttura (approvazione personale della bozza del documento)⁶⁴. È interessante però notare come nello specifico ambito metodologico-didattico permanga la netta e asimmetrica distinzione di ruoli in nome di un'invocata uniformità d'indirizzo. Gli istitutori, infatti, erano tenuti ad attenersi scrupolosamente a quanto loro indicato come si evince dalla lettura dell'articolo tredicesimo:

Gl'Impiegati che saranno di lezione dovranno a norma del Regolamento interno parte del Direttore «ricevere da lui i materiali della loro lezione, dai quali non dovranno punto dipartirsi all'oggetto di non introdurre difformità nell'insegnamento» [...]. Ogni sera ciascuno degl'Impiegati che furono di lezione durante la giornata, corretti i quaderni degli allievi, li ritirerà e li rimetterà al Direttore⁶⁵.

L'accorato appello all'intesa e all'azione sinergica tra le parti appare, quindi, come l'esito di una pura strategia volta a rimuovere ostacoli e a rafforzare la posizione, ancora incerta, del direttore. D'altra parte le parole di Boselli, scritte a un anno di distanza, non lasciano dubbi in proposito:

⁶³ Sulla base della nuova distribuzione del monte orario, l'istitutore e i due ripetitori potevano godere, settimanalmente, di tre mezzeggiate di riposo.

⁶⁴ Per le citazioni cfr. *Lettera del direttore* (13 gennaio 1831), in AST, *Opere Pie al di qua dei monti. Comuni e borgate*, m. 118, pp. 1, 4 e 3.

⁶⁵ *Regolamento disciplinare per gli studi e sorveglianza* (20 gennaio 1831), *ibid.*, p. 3.

In tempi ove non mi credea ancora sicuro abbastanza delle conseguenze di vicende passate, era necessario – si legge nel rapporto presentato alla commissione amministrativa nella seduta del 15 febbraio 1832 – prevenire ed impedire ogni possibile contestazione. Quindi proposi a' miei Collaboratori un piano di regolamento, esiggendo, che dall'esame di esso o me ne proponessero ragionevoli correzioni, o per iscritto lo approvassero [...] tolta come a loro la possibilità di lagnarsi, così a me il pericolo di avere de' dispiaceri⁶⁶.

Sarebbe tuttavia erroneo ricondurre la continuità con la gestione didattica precedente alla sola preoccupazione di garantire all'istituto una guida riconosciuta e autorevole. Nella *Memoria*, data alle stampe nel 1834, le argomentazioni di Boselli a sostegno del ruolo fondamentale della mimica nell'educazione dei non udenti sono indice, infatti, di una piena e convinta adesione alle teorie del compianto maestro: se da un lato egli nega alla parola articolata la funzione di «sorgente primitiva e generatrice di idee nel sordomuto», riducendola a semplice ornamento, dall'altro circoscrive l'efficacia della lettura labiale alla ristretta cerchia di persone con cui il soggetto instaura un rapporto di familiarità. Non mancano osservazioni relative alla possibile insorgenza di disturbi fisici a causa dello sforzo prodotto nell'emissione dei suoni né accenni alla voce sgraziata e alla pronuncia non sempre comprensibile. L'insegnamento del linguaggio verbale doveva quindi essere limitato «a qualche istante» per non pregiudicare ciò che era più utile, «l'istruzione intellettuale per mezzo dei gesti e della parola scritta, colla quale l'esperienza di tanti anni prova mettersi i sordo-muti al caso di conversare con chicchessia»⁶⁷.

Sostanzialmente analogo è il giudizio espresso, cinque anni dopo, in occasione di una visita compiuta, su incarico del governo subalpino, presso la scuola veronese di Provolo. Si legge, infatti, nel rapporto indirizzato al ministero dell'Interno il 10 luglio 1839:

In linea di fatto è innegabile: 1° Che don Provolo fa cantare qualche sordomuto, almeno fino ad un certo punto; 2° Che i sordomuti di D. Provolo parlano assai meno acremento di quello succeda altrove [...]. Rapporto alla utilità, osservando per una parte che gli scolari di D. Provolo intendono qualsiasi cosa loro si dica, e che alcune pure di me ne intesero, sarei inclinato a credere che vi fosse una vera utilità: e per l'altra non avendo quelli inteso da me la massima parte delle mie questioni, il vantaggio sembrerebbemi ristretto a stabilire una labiale comunicazione fra' soli famigliari, come fra maestro e scolaro, fra padre e figlio⁶⁸.

Il proposito conclusivo di avviare una sperimentazione in tal senso non pare aver avuto seguito, come afferma lo stesso Monaci, autore fino a oggi della più ricca e documentata monografia sull'istituto genovese. Le riserve

⁶⁶ *Rapporto del Direttore del R. Istituto dei Sordomuti alla commissione amministrativa per la seduta n. 36 (15 febbraio 1832)*, *ibid.*, p. 1.

⁶⁷ Boselli, *Sui sordo-muti: sulla loro istruzione ed il loro numero. Memoria del Direttore del Reale Istituto di Genova*, cit., pp. 20 e 23.

⁶⁸ Monaci, *Storia dell'Istituto nazionale pei sordomuti in Genova*, cit., pp. 111-112. Durante il viaggio Boselli aveva avuto modo di visitare anche gli istituti dei non udenti di Milano e Parma.

sul sistema orale erano, presumibilmente, ancora forti nel 1871 quando il sacerdote declinò l'invito di Tommaso Pendola a collaborare attivamente alla prima rivista specializzata sull'educazione dei non udenti: è ragionevole supporre, infatti, che la motivazione all'origine del rifiuto fosse, al di là del semplice risentimento per essere stato coinvolto a posteriori nell'impresa, la consapevolezza della distanza che lo separava dalle posizioni metodologico-didattiche di cui il giornale intendeva farsi interprete⁶⁹. È curioso notare come tra i fautori di tale rinnovamento ne figurassero alcuni che, formati alla scuola di Assarotti, avevano, a differenza di Boselli, vissuto l'esortazione del padre scoliopeo «a non avere alcun metodo» come stimolo e incentivo all'apertura e al confronto con le esperienze promosse, in quegli anni, nella penisola e in Europa.

Le granitiche certezze del sacerdote ligure sembrarono vacillare di lì a poco a causa, forse, delle positive impressioni suscitate in lui dalla visita al Pio Istituto dei Sordomuti Poveri di campagna⁷⁰, diretto da don Giulio Tarra, pioniere, insieme a Tommaso Pendola e a Serafino Balestra, del metodo orale in Italia. Risale, infatti, al 1872 una memoria in cui, per la prima volta, Boselli afferma che «si possono benissimo utilmente surrogare molti gesti col moto delle labbra, della bocca, della gola» al punto da dichiararsi favorevole all'esclusione dalla scuola dell'alfabeto manuale e di tutti i gesti convenzionali. Il ricorso alla parola articolata, come canale «ordinario» attraverso cui veicolare l'istruzione, veniva giustificato, inoltre, alla luce di una duplice tipologia di fattori: un maggior grado di integrazione e un più facile apprendimento delle forme grammaticali sulla base della semplice imitazione «senza dover esitare nel dubbio che si possa, al caso di loro estrinsecazione, applicarsi la tale o tal'altra teoria o regola sintetica»⁷¹. Ciò implicava una serie di modifiche di natura organizzativa che egli stesso indicava al consiglio di gestione dell'istituto genovese: un *iter* scolastico non inferiore a otto anni; l'abbassamento dell'età massima per l'accettazione degli allievi; l'assunzione di almeno sei insegnanti, divisi equamente tra maschi e femmine, allo scopo di garantire l'apertura di nuove classi in entrambe le sezioni. Era un'esortazione destinata a rimanere tale: la commissione amministrativa, infatti, preso atto del considerevole aumento di spesa imposto dall'adozione di

⁶⁹ Sull'argomento cfr. O. Tosti, *I cento anni de «L'educazione dei Sordomuti»*, «Educazione dei Sordomuti», vol. C, n. 1, 1972, pp. 3-24. Per un'analisi dettagliata dei contenuti del periodico si rimanda a E. Cimino, *L'educazione dei sordomuti: rivista fondata da Tommaso Pendola. Indici bibliografici dal 1872 al 2002*, Siena, Cantagalli, Voll. I-II, 2003-2004.

⁷⁰ F. Fusina, *Il Pio Istituto Sordomuti poveri di campagna di Milano e don Giulio Tarra (1854-1889)*, in R. Sani (ed.), *L'educazione dei sordomuti nell'Italia dell'800. Istituzioni, metodi, proposte formative*, Torino, Sei, 2008, pp. 251-292.

⁷¹ *Nuovi bisogni per la istruzione dei sordo-muti. Memoria di L.A. Boselli alla Commissione Amministratrice del R. Istituto di Genova*, Genova, Tip. dei Sordomuti, 1872, p. 10. Una breve recensione dell'opuscolo, a firma del padre scoliopeo Micheli, è pubblicata su «L'educazione dei sordomuti», vol. I, n. 5, 1872, pp. 213-214.

tali misure, si limitò a un generico invito al direttore a «ampliare ed ordinare nei limiti del possibile l'istruzione fonetica degli alunni sordomuti».

Nelle risposte ai dieci quesiti sull'insegnamento del linguaggio verbale, oggetto di discussione durante il congresso degli istitutori dei sordomuti italiani tenutosi a Siena nel 1873⁷², la tesi veniva ribadita in modo più preciso e puntuale: dalla necessità di ammettere alle lezioni soggetti al di sotto degli otto anni, nel tentativo di prevenire l'inerzia dei tessuti organici e la radicata abitudine all'uso esclusivo del gesto, all'individuazione di ben cinque tappe nel processo di acquisizione della parola articolata⁷³; dall'utilizzo di un approccio individuale e solo in un secondo tempo simultaneo alla composizione di classi poco numerose, atte a favorire un rapporto di costante vicinanza con il maestro, finalizzato ad una migliore osservazione degli organi vocali, e di scambio tra gli alunni, utile a rilevare errori e inesattezze nella forma espressiva; dall'esigenza di promuovere un «triplice ed avvicendato esercizio della pronuncia, del leggere e dello scrivere», nell'intento di favorire un forte e immediato collegamento tra pensiero e parola, ai vari accorgimenti da porre in atto per rendere l'oralità «il mezzo preponderante di comunicazione», alla consapevolezza dell'opportunità di avvalersi di un sussidiario che, nel presentare fin dalle prime pagine una nomenclatura relativa ai contesti di vita domestica e sociale del sordomuto, consentisse di indicare gli oggetti familiari e comuni attraverso la parola senza ricorrere alla mimica⁷⁴.

Un esame attento e accurato del testo induce, tuttavia, a ipotizzare, nei confronti del modello «germanico», un atteggiamento di apertura piuttosto che un'adesione chiara e consapevole. Nella parte introduttiva, infatti, Boselli dichiara di essersi limitato a rispondere a quanto richiesto nelle domande, quasi a voler prendere le distanze dal principio a esse sotteso, oltre ad auspicare «una coscienziosa e profonda disamina» della questione metodologica alla luce dei «numerosi ed autorevoli» argomenti «addotti a sostegno dell'una o dell'altra

⁷² Boselli e gli istitutori genovesi non avevano potuto partecipare a causa delle difficili condizioni sanitarie in cui versava il capoluogo ligure: le risposte, quindi, erano state inviate tramite posta. Sullo svolgimento e sulle deliberazioni del convegno senese cfr. O. Tosti (ed.), *Atti del primo Congresso degli insegnanti italiani dei sordomuti: Siena 15-25 settembre 1873*, Siena, Scuola tipografica sordomuti, 1972.

⁷³ Il punto di partenza era rappresentato, secondo il sacerdote, dall'insegnamento della posizione degli organi vocali cui faceva seguito l'acquisizione della progressiva capacità di pronuncia e di lettura sulle labbra delle lettere, delle sillabe, delle parole, di una o più proposizioni. Cfr. *Temi di prima categoria relativi all'insegnamento del linguaggio articolato*, «Educazione dei sordomuti», vol. II, n. 7, 1873, pp. 319-320.

⁷⁴ Boselli e i suoi collaboratori utilizzavano il sillabario del professor Vincenzo Troya, stampato presso l'Istituto. Fin dal 1840, infatti, era stata avviata una tipografia interna cui vennero affiancate, nei decenni successivi, un negozio di libri scolastici, una legatoria e una litografia. Per ulteriori notizie cfr. R. Drago, *Cenni sul R. Istituto de' sordo-muti in Genova*, Genova, Tip. Istituto dei sordomuti, 1867, p. 89 e Monaci, *Storia dell'Istituto nazionale pei sordomuti in Genova*, cit., pp. 189-197.

tesi»⁷⁵. D'altra parte la manifestata volontà del sacerdote di escludere il ricorso ai gesti non si traduceva nell'abolizione di qualsiasi sussidio mimico, come lui stesso aveva avuto modo di precisare in una lettera, indirizzata, nel maggio del 1872, a padre Pendola: «La parola articolata – affermava in tale circostanza – deve estendersi [...] a tutti come mezzo ordinario di istruzione escludendone i segni convenzionali, e non i naturali»⁷⁶.

Non deve, quindi, sorprendere la posizione assunta dal sacerdote ligure in occasione del Congresso internazionale di Milano, né, tanto meno, essere letta come un'inversione di tendenza rispetto alle dichiarazioni dei primi anni Settanta. Nella primavera del 1880 il successore di Assarotti pubblicò, presso la tipografia del proprio istituto, un opuscolo che, redatto in lingua francese, illustrava il pensiero dell'autore sui punti destinati a costituire l'oggetto del confronto in programma, di lì a poco, nel capoluogo lombardo⁷⁷. Lo scritto, divulgato all'estero (gli italiani ne furono informati dai colleghi d'oltralpe), gettò discredito, seppur non intenzionalmente, sulle esperienze di metodo orale puro promosse nella penisola e fu motivo di prevenzione per i numerosi istitutori stranieri che avevano deciso di prendere parte al convegno nella speranza di veder fugati dubbi e incertezze legate all'utilizzo esclusivo della parola. Le motivazioni, espresse da Boselli contro l'adozione di un sistema che non contemplava l'uso dei segni, appaiono deboli, talora contraddittorie, non sempre circoscritte al piano della didattica. Egli denuncia l'impossibilità di soddisfare universalmente al diritto all'istruzione per i sordomuti con il ricorso a una forma di insegnamento basata sul solo linguaggio verbale:

Il s'en trouve un bon nombre qui ne peuvent pas réussir, et bien d'autres dont la prononciation est à peine intelligible à leur proches: et ceux-là même (et c'est la moindre portion) qui ont une bonne disposition et prononcent assez intelligiblement, ont besoin, pour être moralement, intellectuellement instruits, d'un temps trop long, qui n'est pas convenable à tous⁷⁸.

Al tempo stesso, però, il direttore di Genova non esita, più volte, a dichiararsi incompetente sul tema trattato al punto da non assumersi la responsabilità di

⁷⁵ *Temi di prima categoria relativi all'insegnamento del linguaggio articolato*, cit., p. 318.

⁷⁶ *Lettera a Tommaso Pendola* (26 maggio 1872), in O. Tosti, *Momento storico in tre lettere del Boselli del 1872 al P. Pendola*, «Educazione dei sordomuti», vol. LXXXIII, s. VII, n. 2, marzo-aprile 1972, p. 110.

⁷⁷ Per un puntuale resoconto del convegno promosso nel capoluogo lombardo cfr. *Atti del congresso internazionale tenuto in Milano dal 6 all'11 settembre 1880 pel miglioramento della sorta dei sordomuti*, Roma, Tip. Eredi Botta, 1881. Sul metodo orale e sulle fasi relative alla sua affermazione nella penisola cfr. Sani, *L'educazione dei sordomuti in Italia prima e dopo l'Unità. Itinerari, esperienze, discussioni*, cit., pp. 15-19.

⁷⁸ Da questi presupposti, secondo Boselli, derivava, come logica conseguenza, la creazione di istituti separati con professori distinti: «Une école ou un pensionat pour l'insegnement par la seule articulation; un'autre école, un autre établissement pour l'instruction de ceux qui ne peuvent pas prononcer» (L.A. Boselli, *Au Congrès International de 1880 pour l'amélioration du sort des sourds-mutes. Notes au programme*, Gênes, Imprimerie des sourds-mutes, 1880, pp. 19-20).

ipotizzare, nemmeno per approssimazione, la durata di un percorso fondato sulla lettura labiale come alternativa alla mimica nella fase propedeutica all'acquisizione della parola⁷⁹. In questo giudizio, non suffragato dall'esperienza, entrano in gioco anche dinamiche di natura affettiva: la fedeltà al metodo è percepita come espressione della fedeltà alla memoria del compianto maestro. Nel testo, infatti, non solo si pone l'accento sull'abilità degli insigni istitutori del passato (de l'Épée, Sicard, Assarotti) nel formare, attraverso i gesti, la scrittura e la parola, allievi in grado di eccellere nei diversi campi del sapere, ma si denuncia come «orrenda» e «ridicola» l'accusa loro rivolta di aver reso soggetti al peccato quei sordomuti nei quali avevano creduto di promuovere, mediante l'intervento educativo, una coscienza etica, religiosa e sociale; sordomuti che, secondo la convinzione attribuita agli «oralisti» dall'autore, dovevano essere abbandonati a se stessi perché, come testimoniava la loro stessa impossibilità a esprimersi nel linguaggio verbale, erano privi di capacità cognitive e, quindi, di discernimento tra bene e male. La crescente diffusione del metodo «alemanno» era spiegata dal sacerdote ligure con l'entusiasmo ingenuo di coloro che si lasciavano sopraffare dalle emozioni all'udire la voce di una persona condannata al silenzio dalla nascita e con il desiderio di protagonismo di non meglio precisati «individui» inclini a fermarsi alla semplice apparenza pur di ottenere il consenso popolare (*Ils applaudissent, sans rien examiner, à ceux qui font plus de bruit avec des déclamations, où il ne manque que deux petites choses qu'on appelait autrefois la solidité et le bon sens*)⁸⁰.

L'opuscolo era destinato a suscitare una dura reazione nel panorama italiano sia per la gravità dei giudizi espressi, sia per la volontà di Boselli di limitarne la circolazione oltre i confini nazionali. Se l'idea di un deliberato boicottaggio può apparire esagerata, è pur vero che la posizione assunta dall'istitutore ottuagenario risulta quanto meno singolare in considerazione della sua abituale tendenza a rimanere ai margini dei dibattiti di natura metodologico-didattica sull'educazione dei non udenti, interessato unicamente al bene dei suoi allievi (*mon maître et moi, contents de faire un peu de bien et d'y employer tout notre temps, sans la moindre prétention de faire des prosélytes, nous n'avons publié ni méthodes, ni leçons, ni livres, ni mémoires*)⁸¹. Padre Marchiò, che in un articolo pubblicato sull'«Educazione dei sordomuti» (*Un libretto stampato in Italia e piovutoci di Francia*) confuta con tono fermo e deciso ognuna di

⁷⁹ *Ibid.*, p. 16. Il concetto è ribadito più avanti: «Par la méthode d'articulation exclusivement, j'avoue mon incompetence à donner un jugement quelconque, après ce que j'ai déjà dit» (p. 23).

⁸⁰ *Ibid.*, p. 25.

⁸¹ *Ibid.*, p. 4. Il concetto era già stato espresso nella citata lettera del 26 maggio 1872 a padre Pendola: «Io non ho altro mandato – scriveva in quell'occasione – che di curare il miglior bene che per me si possa questi infelici, che vengono al nostro Istituto affidati. Fuori dei confini di questo locale e delle sue scuole, io no debbo ingerirmi in cosa alcuna, non ho mai preteso né pretendo d'imporre agli altri le mie idee, perciò non iscrivo, non stampo, non prendo parte a congressi, a discussioni, a giornalismo» (Tosti, *Momento storico in tre lettere del Boselli del 1872 al P. Pendola*, cit., p. 109).

queste obiezioni, interpreta le parole del direttore come tentativo di legittimare l'adozione di una linea ormai minoritaria, facendo leva sull'impraticabilità e sull'inefficacia dell'ipotesi ad essa alternativa⁸². Monaci, nella monografia, offre un'ulteriore chiave di lettura. La considerazione iniziale, legata al dispiacere e al risentimento per il mancato invito all'istituto genovese a prendere parte ai lavori del congresso, lascia, infatti, subito il posto a un'analisi che individua nella visione conservatrice e miope del successore di Assarotti la ragione alla base di tale atteggiamento:

La forza delle cose e dell'ambiente – egli scrive – non permisero al Boselli di avere la visione netta del momento che attraversava la pedagogia emendatrice in Italia e la progressiva evoluzione che, lentamente sì, ma incessantemente si svolgeva, e l'andamento didattico continuò il suo cammino, venendo relegato l'insegnamento della parola nell'ultimo gradino e restando incontrastato il campo della mimica anche nella scuola⁸³.

Nel corso di una lunga esistenza interamente dedicata alla causa dei sordomuti, Boselli si era, di fatto, limitato a mettere in pratica, in modo diligente e puntuale, gli insegnamenti del predecessore: la curiosità suscitata in lui dalle visite presso gli istituti, dove veniva applicato il sistema tedesco, aveva aperto degli spiragli che, però, non si erano mai tradotti nella volontà di dare avvio a sperimentazioni con il metodo orale; un immobilismo influenzato, in parte, dal temperamento schivo, esitante, poco incline all'iniziativa e forse anche dal desiderio di conservare inalterata la fama di un uomo verso cui l'abate ligure nutriva una profonda stima e alla cui memoria era legato da affetto e da un debito di riconoscenza. È indubbio, però, che questa rigida e strenua difesa del passato con la conseguente chiusura nei confronti delle innovazioni determinò l'isolamento di un istituto che, nei primi decenni del secolo, era stato un modello, non solo in Italia, per l'educazione dei sordomuti.

⁸² P. Marchiò, *Un libretto stampato in Italia e piovuto di Francia*, «Educazione dei sordomuti», vol. IX, n. 7, 1880, p. 174.

⁸³ Monaci, *Storia dell'Istituto nazionale pei sordomuti in Genova*, cit., p. 202.

La pedagogia di Félix Dupanloup in Italia

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The pedagogy of Félix Dupanloup in Italy

ABSTRACT: Félix Dupanloup (1802-1878), Savoyard priest and afterwards bishop of Orleans, was one of the most important figures of Catholicism in France and Europe during the second half of the Nineteenth century. Author of numerous pedagogic essays, he promoted a new catechetical method, defended the teaching of pagan classics in the school, and fought the battle for the freedom of education. In this field, his commitment concurred to approve in France the Falloux law (1850) and the Reform of higher education (1875). He is also known for the promotion of women's education, so that has been considered one of the most prominent catholic emancipationist. Dupanloup's thought spread throughout Europe, with numerous translations of his essays. He had a considerable influence in Italy as well, where he brought new perspectives in the pedagogical and school debate. The article focuses on the meaning and features of this influence.

EET/TEE KEYWORDS: Christian Education; Teaching Method; Principles of Education; France; XIX Century.

Nel corso del secondo Ottocento, la cultura francese esercitò un forte ascendente su quella italiana¹. Anche il dibattito pedagogico, nelle diverse scuole che ne animarono il confronto, fu segnato dall'afflato per le idee ed i movimenti che andavano sviluppandosi oltralpe. Per quanto riguarda la corrente spiritualista cattolica, ampie tracce di questa influenza emersero nelle

¹ Per limitarci a qualche riferimento nei vari campi culturali si veda: S. Cigada, *L'influenza della letteratura francese in Italia nell'età umbertina*, in *Cultura e società in Italia nell'età umbertina*, Milano, Vita e Pensiero, 1981, pp. 370-401; S. Franchini, *Cultura nazionale e prodotti d'importazione: alle origini di un archetipo italiano di «stampa femminile»*, in S. Franchini, S. Soldani (edd.), *Donne e giornalismo. Percorsi e presenze di una storia di genere*, Milano, Franco Angeli, 2004, pp. 75-109; L. Ballini, G. Pécout, *Scuola e Nazione in Italia e in Francia nell'Ottocento*, Venezia, Istituto Veneto di Lettere, Scienze ed Arti, 2007.

varie forme del suo impegno culturale: dalla elaborazione teorica, alle iniziative pubblicistiche, alla florida letteratura educativa popolare².

Tra le varie personalità francesi che ebbero una certa risonanza nello scenario italiano, Félix Dupanloup rappresentò senza dubbio una delle più significative. Protagonista del dibattito europeo, fu una «personnalité protéiforme»³, che spaziò dalla teologia dell'educazione alla didattica del greco, dall'educazione femminile alla battaglia per la libertà di insegnamento. Approfondire la sua circolazione in Italia permette non solo di tornare su un «classico» poco studiato della pedagogia cristiana dell'Ottocento, ma anche di meglio lumeggiare le vicende di una corrente, quella spiritualista nei decenni dell'età liberale, intorno a cui continuano a scarseggiare gli studi.

1. Cenni biografici

Félix Antoine Philibert Dupanloup⁴ nacque il 3 gennaio 1802 in un piccolo paesino dell'alta Savoia, Saint Felix, allora territorio del Regno di Sardegna. Figlio di una ragazza madre, all'età di sette anni si trasferì a Parigi, dove, nonostante le precarie condizioni economiche, portò avanti con successo i primi studi. Nel 1815 fu ammesso al Seminario minore di Saint Nicolas du Chardonnet, mentre sei anni dopo passò a quello maggiore di San Sulpizio, con sede ad Issy. Ordinato sacerdote il 18 dicembre 1825, fu nominato curato nella parrocchia della Maddalena a Parigi dove si occupò soprattutto del catechismo e della formazione dei giovani. Presto noto per il suo talento educativo, divenne cappellano di M.me la Dauphine, figlia di Luigi XVI, e catechista del figlio, il Duca di Bordeaux, il «mancato» Enrico V. In seguito curò l'educazione religiosa del duca di Nemours, principe di Orléans, e della sorella, la principessa Clementina. Nel 1829 gli fu offerto il posto di segretario *generale* del Ministero dei culti, ma declinò l'invito, preferendo l'impegno catechistico. L'interesse per la formazione religiosa si tradusse in alcuni scritti. Tra i primi vi fu il *Manuel de catéchisme* (1830), poi seguito dal *Méthode générale de catéchisme, recueillie*

² Cfr. A. Ascenzi, *Itinerari e modelli di educazione femminile nella pubblicistica del secolo XIX*, in C. Ghizzoni, S. Polenghi (edd.), *L'altra metà della scuola: educazione e lavoro delle donne tra Otto e Novecento*, Torino, SEI, 2008, p. 4.

³ C. Marcilhacy, *Le Diocèse d'Orléans sous l'épiscopat de Mgr. Dupanloup (1849-1878)*, Paris, Plon, 1962, p. X.

⁴ Sulla vita e le opere di Dupanloup si veda: F. Buisson, *Dupanloup*, in *Dictionnaire de pédagogie*, Paris, Hachette, 1882, Vol. I, pp. 742-747; F. Lagrange, *Vie de Mgr Dupanloup*, Paris, Librairie Poussielgue Frères, 1884, Vol. III; E. Faguet, *Mgr. Dupanloup: un grand évêque*, Paris, Hachette, 1914; R. Aubert, *F. Dupanloup*, in *Dictionnaire d'histoire et de géographie ecclésiastiques*, Paris, Letouzey et Ané, 1960, Vol. XIV, pp. 1070-1122; F. Dupanloup, *Diario*, Modena, Ed. Paoline, 1962, pp. 1-33; F. Restaino, *Littré, Dupanloup e altri: positivismo e antipositivismo durante il secondo impero*, «Giornale critico della filosofia italiana», n. 1, 1981, pp. 87-125.

des ouvrages des pères et docteurs de l'Église et des catéchistes les plus célèbres depuis St Augustin jusqu'à nos jours (1841), *Manuel des petits séminaires* (1843) e dal più tardo *Le catéchisme chrétien, ou un exposé de la doctrine de J.-C. offert aux hommes de monde* (1865). Con i suoi saggi diede un significativo contributo per il rinnovamento del metodo catechistico in Francia⁵, sino ad influenzare la stesura del più noto catechismo di Pio XII⁶.

Nel 1837, Dupanloup fu nominato direttore del Seminario minore di Saint Nicolas du Chardonnet. Qui rivoluzionò la vita dell'Istituto⁷, ottenendo ottimi risultati⁸. L'esperienza arricchì non solo la sua vita spirituale, ma contribuì a far maturare le sue conoscenze pedagogiche. Per volere dell'arcivescovo di Parigi Mgr Affre, nel 1845 lasciò la direzione e fu nominato canonico della Chiesa di Notre Dame.

Poco dopo, il Re di Sardegna Carlo Alberto, tramite il suo ambasciatore il marchese di Brignola, gli offrì il vescovado di Annecy e la direzione dell'istruzione pubblica⁹. Dupanloup rifiutò, sia perché preferiva restare in Francia, sia per un certo timore nel ricoprire la carica di vescovo¹⁰. Non molto tempo dopo, incalzato dal Cardinal Giraud, decise invece di accettare l'elezione episcopale nella diocesi di Orléans, dove fu consacrato il 9 dicembre 1849.

Tra le sue prime iniziative, promosse un sondaggio tra le varie parrocchie per conoscere la situazione religiosa delle diocesi¹¹. Emerse un quadro sociale segnato dalla secolarizzazione e da una «ignorance crasse»¹². Altrettanto critica gli apparve la situazione del clero, «trop peu nombreux et de médiocre valeur»¹³. Per questa ragione, nel suo disegno di «riconquista», Dupanloup

⁵ Cfr. P. Braido, *Catechesi e catechismi tra ripetizione, fedeltà e innovazione in Italia dal 1815 al 1870*, in *Problemi di storia della Chiesa dalla Restaurazione all'unità d'Italia*, Napoli, Edizioni Dehoniane, 1985, p. 16.

⁶ *Ibid.*, p. 48.

⁷ Diverse memorie offrono una testimonianza di quell'esperienza. Si vedano: A. Marillon, *Souvenirs de Saint-Nicolas*, Paris, Lecoffre, 1859; Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. I, pp. 169-233; E. Renan, *Ricordi d'infanzia e di giovinezza*, Torino, UTET, 1954, pp. 115-158.

⁸ Grazie all'impegno del nuovo direttore, in pochi anni l'Istituto passò da ottanta a più di duecentocinquanta allievi, divenendo uno dei più importanti centri educativi della capitale. Cfr. Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. I, p. 364.

⁹ Dupanloup racconta l'episodio in una lettera mandata alla principessa Borghese e riportata da Lagrange: «Princesse, le roi de Sardaigne, après m'avoir souvent, depuis quelques années, fait parvenir des témoignages de grande bonté, m'a fait offrir directement, par son ambassadeur ici, des places considérables en ses États, évêché, archevêché, et particulièrement la direction de l'instruction publique». Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. I, pp. 367-368.

¹⁰ Cfr. Faguet, *Mgr. Dupanloup: un grand évêque*, cit., p. 33.

¹¹ La Marcilhacy dedicò due ampi ed accurati saggi all'azione pastorale del vescovo e alla situazione socio-religiosa della sua diocesi: Marcilhacy, *Le Diocèse d'Orléans sous l'épiscopat de Mgr. Dupanloup (1849-1878)*, cit.; C. Marcilhacy, *Le Diocèse d'Orléans au milieu du XIX^e siècle. Les Hommes et leurs mentalités*, Paris, Sirey, 1964.

¹² Marcilhacy, *Le Diocèse d'Orléans sous l'épiscopat de Mgr. Dupanloup (1849-1878)*, cit., p. II.

¹³ *Ibid.*, p. 81.

puntò sulla preparazione dei giovani preti. Ripensò la formazione del clero e riorganizzò secondo i principi sperimentati al Saint Nicolas il seminario minore de *La Chapelle Saint-Mesmin*, e ne fondò uno nuovo, il *Saint-Croix*. Il primo fu affidato all'abbé Hetsch, uno dei suoi più stretti collaboratori¹⁴. In poco tempo arrivarono ottimi risultati. Gli allievi dei «piccoli seminari» aumentarono in modo esponenziale e si ebbe un deciso incremento delle ordinazioni sacerdotali¹⁵. Attribuendo alle congregazioni femminili una importanza fondamentale per la formazione delle nuove generazioni, il vescovo si impegnò con successo nella loro diffusione¹⁶. Tra le altre, chiese personalmente a Madeleine-Sophie Barat di aprire un collegio della Società del Sacro Cuore nella sua diocesi¹⁷. Riuscì a facilitare anche l'insediamento di diverse congregazioni maschili¹⁸.

In seguito alla seconda guerra d'indipendenza, l'attenzione di Dupanloup si concentrò sull'annosa questione del potere temporale del Papa. Al tema dedicò alcuni scritti già dal 1859, ma il saggio più organico uscì nel 1864 col titolo *La Convention du 15 septembre et l'encyclique du 8 décembre*¹⁹, dove legò la difesa dell'indipendenza territoriale del Pontefice ad una puntuale spiegazione della *Quanta Cura*. Il libro, che rappresentò una «étape capitale» del cattolicesimo liberale francese²⁰, raggiunse un eccezionale successo. A soli venti giorni dalla pubblicazione ne erano già state vendute centomila copie. Nel giro di pochi anni arrivò a contare solo in Francia trentaquattro edizioni. La sua fortuna travalicò i confini nazionali: fu tradotto in tutta Europa, negli Stati Uniti e nell'America latina. Seicentotrenta tra cardinali e vescovi inviarono al Dupanloup messaggi di apprezzamento per il suo lavoro²¹. Tra gli altri, spiccano quelli di Pio IX, del segretario di Stato Antonelli e del cardinale di Perugia Pecci, futuro Leone XIII²².

Alla fine degli anni '60, si diffusero voci sempre più insistenti sulla possibilità di un nuovo Concilio in cui si sarebbe affrontato il tema dell'infalibilità

¹⁴ A questa figura Netty du Boÿs, anche lei allieva di Dupanloup, dedicò un saggio: *L'Abbé Hetsch par l'Auteur des derniers-Jours de Monsieur Dupanloup, Avec introduction de Mgr Perraud, évêque d'Autun*, Paris, Poussielgue, 1886. Dopo la pubblicazione della biografia, la «Rassegna Nazionale» gli dedicò un articolo a cura di G. Grabinski, *Un collaboratore di monsignor Dupanloup*, «Rassegna Nazionale», 1 ottobre 1886, pp. 417-450. Nel 1888, il libro della Netty du Boÿs fu tradotto in Italia dalla contessa Sofia Douglas Scotti, con la tipografia vescovile Ghiotti di Mondovì.

¹⁵ Marcihacy, *Le Diocèse d'Orléans sous l'épiscopat de Mgr. Dupanloup (1849-1878)*, cit., pp. 84-91.

¹⁶ *Ibid.*, p. 205.

¹⁷ Se nel 1851 la diocesi di Orléans contava dodici congregazioni religiose, nel 1878 divennero trentuno. Cfr. Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. II, pp. 187-188.

¹⁸ *Ibid.*, pp. 205-209.

¹⁹ Una puntuale ricostruzione storica della preparazione, pubblicazione e delle reazioni al saggio, è proposta in R. Aubert, *Mgr Dupanloup et le Syllabus*, «Revue d'histoire ecclésiastique», n. 1, 1956, pp. 79-142; n. 2-3, 471-512; n. 4, 837-915.

²⁰ *Ibid.*, n. I, p. 79.

²¹ Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. II, pp. 502-513.

²² Aubert, *Mgr Dupanloup et le Syllabus*, cit., n. 4, pp. 913-915.

pontificia. Sulla questione, Dupanloup era concorde nel merito, ma non reputava fosse il momento opportuno per la promulgazione del dogma. Nel novembre del 1869, poco prima di partire per l'inizio dei lavori conciliari, espresse le sue riserve nell'opuscolo: *Observations sur le controverse soulevée relativement à la définition de l'infailibilité au futur concile*. Da Villa Grazioli, residenza della famiglia Borghese in cui era ospite, organizzò una serie di incontri e colloqui per allargare il consenso attorno alle sue tesi. Arrivò a scrivere direttamente al Pontefice²³, e il 14 dicembre poté avere un'udienza privata²⁴. Le sue ragioni restarono comunque minoritarie. Non volendo esprimere un'opinione contraria a quella di Pio IX e alla maggioranza dei padri conciliari, lasciò Roma assieme ad altri «inopportunisti» poco prima della votazione. Tornato ad Orléans, spedì al Papa una lettera in cui ribadiva le sue motivazioni, ma gli rinnovava totale obbedienza²⁵.

In Francia era già scoppiata la guerra contro la Prussia. Dopo l'occupazione di Orléans l'11 ottobre 1870, il vescovo si spese nel sostegno alle famiglie e ai rifugiati. Concluse le ostilità ed iniziò il travagliato corso politico che portò alla Terza Repubblica, l'8 febbraio 1871 fu eletto nel dipartimento di Loiret all'Assemblea Nazionale in rappresentanza dell'episcopato, raggiungendo quasi le trentamila preferenze²⁶. Nel frattempo, senza la Francia a fare da deterrente, il Regno italiano aveva concluso l'occupazione dello Stato della Chiesa. Nel 1872 Pio IX chiese al vescovo di Orléans di intervenire pubblicamente sul tema. Dupanloup diede alle stampe la *Lettre de M. l'évêque d'Orléans à M. Minghetti, ministre des finances du Roi Victor-Emmanuel sur la spoliation de l'Eglise à Rome et en Italie* (1874), in cui lamentò l'usurpazione italiana e tornò a spiegare le motivazioni del potere temporale. Il Papa definì la lettera «irréfutable»²⁷, mentre il cardinale Antonelli elogiò il testo scrivendo al vescovo d'Orléans: «Votre plume nous a valu une armée»²⁸.

Quando nel 1875 fu sciolta la camera, Dupanloup fu designato come settantaquattresimo senatore «inamovibile». Nel 1878 salì sul soglio pontificio Leone XIII. Il nuovo Papa aveva l'intenzione di elevare il vescovo d'Orléans alla porpora cardinalizia²⁹, ma il governo francese pretese come condizione per l'elezione che Dupanloup non intervenisse pubblicamente contro i festeggiamenti per il centenario di Voltaire. La richiesta fu rivolta direttamente al vescovo, ma, come ricorda Emile Faguet, «Il n'était pas habitué à faire des

²³ Aubert, *F. Dupanloup*, in *Dictionnaire d'histoire et de géographie ecclésiastiques*, cit., p. 1081.

²⁴ Dupanloup, *Diario*, cit., p. 300.

²⁵ Faguet, *Mgr. Dupanloup: un grand évêque*, cit., pp. 99-100.

²⁶ Marcilhacy, *Le Diocèse d'Orléans sous l'épiscopat de Mgr. Dupanloup (1849-1878)*, cit., p. 444.

²⁷ Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. III, p. 297.

²⁸ *Ibid.*, Vol. III, p. 84.

²⁹ Aubert, *F. Dupanloup*, in *Dictionnaire d'histoire et de géographie ecclésiastiques*, cit., p. 1081.

marchés. Il répondit avec placidité qu'il n'avait pas à entrer dans cet ordre de considérations; il publia ses lettres contre la célébration du centenaire de Voltaire et il ne fut pas cardinal»³⁰. Avrebbe indossato la porpora per poco tempo: l'11 ottobre del 1878, Dupanloup lasciò questo mondo.

2. Una pedagogia organica

Tra le più di cento opere pubblicate da Dupanloup nel corso della sua carriera³¹, una parte cospicua fu dedicata a tematiche pedagogiche. Per quanto le sue posizioni abbiano già attirato l'attenzione dei ricercatori³², manca ancora uno studio sistematico e completo dedicato alla sua riflessione educativa.

La pedagogia del vescovo d'Orléans si presenta come una costruzione coerente e sistematica, poggiata su due cardini fondamentali: l'antropologia religiosa e l'annuncio evangelico. Oltre alla tradizione sulpiziana in cui fu formato, la sua elaborazione fu arricchita dagli apporti di Fénelon³³ e Bossuet³⁴, che rappresentarono per tutta la vita delle fonti di ispirazione. Un notevole contributo fu fornito, inoltre, dalla lunga esperienza di formatore, dalla quale attinse numerose lezioni ed esempi, sovente riportati nei suoi saggi.

Dupanloup illustrò le sue riflessioni in due testi principali: *De l'éducation* (pubblicato in tre tomi tra il 1850 e il 1857) e *De la haute éducation intellectuelle*, (sempre in tre tomi, pubblicati tra il 1855 e il 1866)³⁵. Il primo è ritenuto

³⁰ Faguet, *Mgr. Dupanloup: un grand évêque*, cit., p. 126.

³¹ L'elenco completo delle opere di Dupanloup fu riportato da H. Herluison, *Mgr. Dupanloup, évêque d'Orléans, de l'Académie française*, Orléans, Herluison, 1878.

³² F. De Hovre, *Le Catholicisme, ses pédagogie*, Bruxelles, Albert Dewit, 1930, pp. 110-154; A. Siracusa, *Il pensiero pedagogico di Mgr Dupanloup*, Tesi di Laurea in Pedagogia, R. Università di Torino, Facoltà di Magistero, Anno accademico 1940-1941; A. Ciribini Spruzzola, *Le correnti cattoliche contemporanee*, Milano, Viola, 1951, pp. 31-35; A. Kautz, *Félix Dupanloup*, in *Dizionario Enciclopedico di Pedagogia*, Torino, S.A.I.E., 1958, Vol. I, pp. 773-774; P. Viotto, *Lo spiritualismo francese*, in *Nuove questioni di storia della pedagogia*, Brescia, La Scuola, 1977, Vol. II, pp. 637-642; G. Vico, *Ottocento pedagogico cristiano*, Brescia, La Scuola, 2005, pp. 110-111.

³³ Uno dei primi scritti pubblicati dal sacerdote savoiano fu un'ampia antologia degli scritti di Fénelon, stampata in sei volumi con il titolo *Le christianisme présenté aux hommes du monde*. Il lavoro fu prima editato tra il 1835 e il 1836, e poi ripetutamente ripubblicato sino al 1860. Nel 1837 diede alle stampe un'altra antologia del vescovo di Cambrai, intitolata *La vraie et solide vertu sacerdotale*. Il legame fu così stretto che Dupanloup fu definito come «l'erede più diretto del pensiero di Fénelon». M. Milan, *Donna, famiglia, società. Aspetti della stampa femminile cattolica in Italia tra '800 e '900*, Genova, ECIG, 1983, p. 28.

³⁴ Le sue opere restarono con quelle del vescovo di Cambrai un faro nella sua formazione giovanile e nella preparazione alla vita sacerdotale. Cfr. Dupanloup, *Diario*, cit., pp. 53, 58, 62, 64, 66; Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. I, pp. 35, 58.

³⁵ Da entrambi estrasse delle parti pubblicate separatamente: *Enfant* (1869), *Conseils aux jeunes gens sur l'étude de l'histoire* (1872), *Conseils aux jeunes gens sur l'étude de la philosophie*

dalla maggior parte degli studiosi il capolavoro della sua vita. Secondo Piero Viotto rappresenta «una “summa” dei principi pedagogici cristiani»³⁶, mentre Frans De Hovre ne ha parlato come di un «classico»³⁷. Il saggio fu decisivo per l'elezione di Dupanloup all'accademia di Francia, avvenuta il 18 maggio 1854. Nel discorso con cui presentò il vescovo tra gli «immortali», Salvandy elogiò il saggio come un «monument de la plus haute pédagogie qui fut jamais»³⁸. Nel testo sviluppa temi generali quali il senso dell'educazione, i suoi caratteri principali e le più importanti figure formative, ma propone anche puntuali analisi intorno alla psicologia e alle facoltà degli allievi, avallati da numerosi episodi di «vita educativa». Non a caso, il filosofo spiritualista Edme Caro ha osservato che il libro non è solo pensato, ma «vécu»³⁹. *De la haute éducation intellectuelle* si incentra, invece, sullo scopo e i tratti dell'insegnamento superiore. Ebbe una influenza significativa nella pedagogia cristiana successiva, ispirando, tra le altre opere, *Le sources* (1861) del padre Gratry⁴⁰, e successivamente *La vie intellectuelle* (1920) di Antonin-Dalmace Sertillanges.

Alla base della riflessione pedagogica di Dupanloup vi è una severa diagnosi sulla situazione sociale ed educativa del tempo. Introducendo *De l'éducation* lamentava ripetutamente che «Les hommes manquent». A suo giudizio, solo la riscoperta della più autentica formazione umana poteva permettere una riscossa ed assicurare alle nuove generazioni una società buona e prospera⁴¹. In questo senso invitava a ritornare sulle domande fondamentali legate alla riflessione educativa, collocando il dibattito pedagogico su temi essenziali come il valore dell'uomo e il senso della sua destinazione.

Dupanloup considerava la formazione come «la continuation de l'œuvre divine dans ce qu'elle a de plus noble et de plus élevé: la création des âmes»⁴². Assieme arte e scienza⁴³, l'educazione era definita come un'azione di «autorità e rispetto»⁴⁴. Si tratta di due concetti centrali nella sua visione pedagogica. Se infatti nelle sue opere contestava la deriva autoritaria di una certa metodologia

(1872), *Lettre sur l'étude du droit* (1865).

³⁶ Viotto, *Lo spiritualismo francese*, in *Nuove questioni di storia della pedagogia*, cit., p. 637.

³⁷ De Hovre, *Le Catholicisme, ses pédagogues, sa pédagogie*, cit., p. 154.

³⁸ Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. II, p. 158.

³⁹ Aubert, *F. Dupanloup*, in *Dictionnaire d'histoire et de géographie ecclésiastiques*, cit., p. 1088.

⁴⁰ Dupanloup ebbe uno stretto rapporto con l'oratoriano. Si veda: H. Ramière, *L'abbé Gratry et mgr. Dupanloup évêque d'Orléans*, Toulouse, A. Regnault; Paris, Enault et Vuailat, 1870.

⁴¹ «Cultiver, exercer, développer, fortifier et polir toutes les facultés physiques, intellectuelles, morales et religieuses qui constituent dans l'enfant la nature et la dignité humaine; donner à ces facultés leur puissance et de leur action; Par là former l'homme et le préparer à servir sa patrie dans les diverses fonctions sociales qu'il sera appelé un jour à remplir, pendant sa vie sur la terre; Et ainsi, dans une pensée plus haute, préparer l'éternelle vie, en élevant la vie présente: Telle est l'œuvre, tel est le but de l'Éducation». Dupanloup, *De l'éducation*, cit., Vol. I, p. 2.

⁴² *Ibid.*, p. 4.

⁴³ *Ibid.*, pp. 23-24.

⁴⁴ *Ibid.*, p. 1.

che sviliva l'apporto della libertà personale, richiamava al valore dell'autorità criticando i nefandi esiti dell'educazione negativa di Rousseau⁴⁵. Reputava necessario l'apporto di una guida affinché l'educando potesse raggiungere la maturità della sua libertà, la quale non si dava spontaneamente, ma era l'esito di un cammino nel segno della verità. In questo sviluppo, l'educatore era chiamato a rispettare la coscienza e la libertà del discente, che a sua volta doveva divenire il protagonista del suo perfezionamento: «l'enfant doit travailler lui-même à la grande œuvre de son Éducation, par un concours personnel, par une action libre, spontanée, généreuse: c'est la loi de la nature et de la Providence»⁴⁶. Nel rispetto di questa legge, l'educatore doveva calibrare il suo intervento: «ce que fait l'instituteur par lui-même est peu de chose, ce qu'il fait faire est tout: j'entends ce qu'il fait faire librement. Quiconque, encore une fois, n'a pas compris cela, n'a rien compris à l'œuvre de l'Éducation humaine»⁴⁷. La libertà andava persuasa e accompagnata, non costretta. Anche perchè, citando Fénelon, ricordava: «Nulle puissance humaine ne peut forcer le retranchement impénétrable de la liberté d'un cœur»⁴⁸. Per questa attenzione alla volontà e alla libertà dell'educando, Dupanloup può essere considerato come un antesignano di quella «costellazione oratoriana»⁴⁹ segnata da autori come Gratry, Laberthonniere, Newman e Blondel.

L'azione educativa doveva essere «une, simple, constante, comme l'homme lui-même»⁵⁰. L'obiettivo era individuato nello sviluppo integrale della persona, cioè nella sua «unité radicale». Sotto questo versante, lamentava l'ipertrofia del nozionismo a discapito della disciplina e della tempra del carattere, aspetti per i quali invocava un maggior impegno delle famiglie e delle istituzioni scolastiche. Riteneva l'educazione e l'istruzione come due aspetti necessari l'uno all'altro⁵¹. Dalla sua esperienza rilevava come: «Il y a des gens très-instruits et qu'on trouve avec raison, très-mal élevés, à ne parler même que de l'Éducation de l'esprit»⁵². Troppo spesso l'istruzione si limitava alla comunicazione delle «regole», senza

⁴⁵ Cfr. De Hovre, *Le Catholicisme, ses pédagogie, sa pédagogie*, cit., p. 115.

⁴⁶ Dupanloup, *De l'éducation*, cit., Vol. I, p. 177.

⁴⁷ *Ibid.*, p. 178.

⁴⁸ *Ibid.*, p. 214.

⁴⁹ L'espressione è usata da F. De Giorgi, *Rosmini e il suo tempo. L'educazione dell'uomo moderno, tra riforma della filosofia e rinnovamento della Chiesa (1797-1833)*, Brescia, Morcelliana, 2003, p. 399.

⁵⁰ *Ibid.*, p. 111.

⁵¹ «Si les soins du maître et les efforts de l'élève n'aboutissaient pas à développer, à étendre, à élever, à affermir les facultés; s'ils se bornaient, par exemple, à pourvoir l'esprit de certaines connaissances, et, si je l'ose dire, à les y emmagasiner, sans ajouter à son étendue, à sa force et à son activité naturelle, l'Éducation ne serait pas faite; il n'y aurait là que de l'instruction. Je n'y reconnaitrais plus cette grande et belle œuvre créatrice qui se nomme l'Éducation: *educere*. L'enfant pourrait à toute force être *instruit*, il ne serait pas *élevé*! L'Éducation même de l'esprit serait en défaut». *Ibid.*, p. 9.

⁵² *Ibid.*, p. 139.

però animare nel profondo la volontà dell'educando e sollevarlo verso gli ideali più autentici dell'esistenza.

3. *Le battaglie per la libertà d'insegnamento, la legge Falloux, le Università cattoliche*

L'impegno di Dupanloup a favore di un'effettiva libertà educativa si inserì nel più ampio e complesso dibattito scolastico che si svolse in Francia tra la Restaurazione e la Terza Repubblica. Il tema occupò un posto rilevante nell'opera del vescovo d'Orléans. Giuseppe Grabinski, suo allievo e redattore della «Rassegna Nazionale», scrisse che fu «la grande tesi della sua vita»⁵³. Alla base di questa rivendicazione vi erano due principali ragioni. Da una parte, Dupanloup difendeva la prerogativa della famiglia nella formazione dei figli, «L'État – sosteneva – assiste la famille et ne la supplante pas»⁵⁴, dall'altra promuoveva il concorso di soggetti non statali all'istruzione e all'educazione dei giovani, in particolare la Chiesa e le congregazioni religiose. Se divenne celebre la sua espressione che voleva le giovani educate «sur les genoux de l'Église»⁵⁵, promosse, tanto in linea teorica quanto nel suo impegno politico, un sistema scolastico plurale accettando, nel suo intrinseco valore, il principio della libertà d'insegnamento. Per questa ragione subì gli attacchi dei gruppi intransigenti che non ammettevano, neanche come «ipotesi» o male minore, che alla Chiesa fosse tolto il pieno controllo dell'educazione dei giovani.

I primi interventi sul tema risalgono al periodo in cui Dupanloup era ancora direttore del San Nicola. Polemico contro un progetto di legge che stava prendendo forma in Parlamento, nel 1844 diede alle stampe la *Première et Deuxième lettres à M. le duc de Broglie, rapporteur du projet de loi relatif à l'instruction publique*. Tra gli altri aspetti criticati dal sacerdote, vi era l'ostinazione a voler lasciare inattuato il principio della libertà d'insegnamento professato nel terzo articolo della legge Guizot del 1833. Tornò sull'argomento in un libro di poco seguente, *De la pacification religieuse* (1845). Il saggio, che sintetizzava con chiarezza le posizioni dei cattolici liberali, trovò anche l'apprezzamento di padre Roothaan, allora generale dei Gesuiti⁵⁶. Poco dopo la sua pubblicazione, Dupanloup incontrò il 21 settembre 1846 a Roma il neoeletto Pio IX. Il nuovo pontefice rinfrancò il sacerdote nella battaglia per la scuola libera da poco intrapresa, rivolgendogli questo invito: «réclamer

⁵³ Grabinski, *Un collaboratore di monsignor Dupanloup*, cit., p. 434.

⁵⁴ Dupanloup, *De l'éducation*, cit., Vol. II, p. 237.

⁵⁵ Si veda per esempio il recente: J.M. Chapoulie, *L'École d'État conquiert la France. Deux siècles de politique scolaire*, Presses universitaires de Rennes, 2010, p. 139.

⁵⁶ H. Chapon, *Mgr Dupanloup et la liberté: sa vraie doctrine*, Paris, H. Chapelliez et Cie, Libraires-Éditeurs, 1889, p. 93.

la liberté d'enseignement avec courage, avec fermeté»⁵⁷. Poco tempo dopo, fu avanzato un nuovo progetto di legge dal conte di Salvandy, successore di Villemain al Ministero dell'istruzione. La proposta deluse i cattolici. Dupanloup pubblicò una critica puntuale dal titolo: *Du nouveau projet de loi sur la liberté d'enseignement* (1847). L'opuscolo ebbe grande successo. Tra gli altri, Alexis de Tocqueville gli inviò una lettera per complimentarsi dell'opuscolo⁵⁸.

Nel Dicembre del 1849 Luigi Napoleone Bonaparte nominò come Ministro dell'istruzione e dei culti il conte di Falloux, amico di Dupanloup e suo collaboratore nel periodico cattolico liberale «Correspondant». Inizialmente titubante ad assumersi questa responsabilità, lo statista accettò con l'assicurazione di Dupanloup e degli altri cattolici liberali, che lo avrebbero sostenuto nella preparazione di una riforma della scuola finalmente rispettosa della libertà d'insegnamento⁵⁹. Il suo impegno in questa direzione fu immediato e risoluto. Falloux istituì due commissioni extraparlamentari, poi diventate una, chiamando a farne parte Thiers, Monsignor Sibour, Cuvier, Cousin, Saint-Marc Girardin e Dupanloup. Come confermano gli atti della commissione, l'impegno del sacerdote fu decisivo per trovare una sintesi e concludere la proposta di legge⁶⁰.

La riforma disegnata dalla Commissione rilanciava il ruolo della scuola pubblica ed insieme promuoveva una reale «libertà» dell'istruzione. L'articolo 17 aboliva il monopolio governativo della scuola e professava il principio della libertà d'insegnamento. Gli articoli 18 e 21 limitavano ai soli ambiti dell'igiene e della morale i controlli statali sulle scuole non governative. Prevedeva, poi, la possibilità che gli istituti privati potessero essere finanziati da fondi pubblici. Si trattò di una norma rivoluzionaria, che rappresentò nei decenni seguenti una conquista esemplare. Per quanto concerne il «monopolio delle abilitazioni», il testo confermò quanto stabilito dalla legge Pelet del 1836, vale a dire che le «lettres d'obédience» dei superiori delle congregazioni religiose potessero considerarsi equipollenti al brevetto statale per l'insegnamento. Ad ogni cittadino francese con almeno venticinque anni ed in possesso del titolo di baccellierato o, in alternativa, con cinque anni di insegnamento, la legge consentiva di fondare un istituto privato. Obbligava, infine, i comuni con più di ottocento abitanti a fondare una scuola femminile.

La legge fu votata il 15 marzo 1850, passando con 450 voti a favore e 148 contro. Nel giro di pochi anni portò ad un generale aumento del tasso di alfabetizzazione, ed in special modo quello femminile⁶¹. Le scuole non statali,

⁵⁷ Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. I, p. 393.

⁵⁸ *Ibid.*, p. 425.

⁵⁹ *Ibid.*, p. 476.

⁶⁰ G. Chénisseau, *La commission extraparlamentaire de 1849, texte intégral inédit des procès-verbaux*, Paris, De Gigord, 1937.

⁶¹ Come ha notato la Mayeur: «les trente années qui séparent la loi Falloux de l'avènement des républicains voient continuer le progrès de l'alphabétisation, et surtout, l'alphabétisation des

tanto le primarie quanto le secondarie⁶², ebbero un notevole sviluppo. Gli istituti religiosi incrementarono la loro presenza, in particolare nell'educazione delle giovani⁶³.

Dopo le polemiche con il ministro Duruy legate alla formazione femminile⁶⁴, sul finire degli anni '60 il vescovo d'Orléans iniziò una campagna volta ad estendere le libertà già ottenute per le scuole anche al sistema universitario. Sul tema pubblicò un saggio nel 1869, *La liberté de l'enseignement supérieur*, e dopo aver concorso a bloccare la proposta di Jules Simon del 1871, sostenne il progetto di legge che arrivò in aula nel 1874 presentato da Jaubert. Tale riforma stabiliva la parificazione tra i certificati di laurea delle Università statali e non statali, alle quali erano tuttavia richieste almeno tre Facoltà per essere riconosciute. Per le assegnazioni dei diplomi di laurea e di dottorato, la legge prevedeva commissioni miste, composte da docenti di atenei governativi e non governativi. La norma era volta a scardinare il monopolio statale dei diplomi di laurea, portando ad una reale concorrenza tra le varie Università. Dupanloup fu tra i maggiori sostenitori della riforma e intervenne ripetutamente all'Assemblea per perorarne la causa⁶⁵. Replicando al parlamentare Bert, che accusava la Chiesa di voler sostituire il proprio monopolio a quello dello Stato, difese la legge sulla base dei principi «laici» di «libertà»⁶⁶, «emulazione», e «concorrenza»⁶⁷.

La riforma fu approvata definitivamente il 12 luglio 1875. Per il vescovo, come lui stesso disse in aula, fu il coronamento della battaglia di tutta una vita⁶⁸. A soli due anni dalla promulgazione della riforma, nacquero cinque Università

filles». Mayeur, *Histoire générale de l'enseignement et de l'éducation. De la Révolution à l'École républicaine*, cit., pp. 358-359. Si vedano anche: C. Lelièvre, *Histoire des institutions scolaires (depuis 1789)*, Paris, Nathan, 1990, p. 91; N. Arnaud-Duc, *Le contraddizioni del diritto*, in G. Dury, M. Perrot (edd.), *Storia delle donne in Occidente*, Roma, Laterza, 1991, p. 60.

⁶² Lelièvre, *Histoire des institutions scolaires (depuis 1789)*, cit., pp. 89-90.

⁶³ Cfr. Prost, *Regards historiques sur l'éducation en France: 19.-20. Siècles*, cit., p. 222.

⁶⁴ Cfr. F. Dupanloup, *M. Duruy et l'éducation des filles*, Paris, Charles Douniol, 1867; *La femme chrétienne et française, dernière réponse de Mgr Dupanloup à M. Duruy et à ses défenseurs*, Paris, Charles Douniol, 1868; *Les armes de l'épiscopat justifiées par les faits, lettre à un cardinal par Mgr l'évêque d'Orléans*, Paris, Charles Douniol, 1868.

⁶⁵ Cfr. *Discours prononcés par Mgr L'Évêque d'Orléans à l'Assemblée Nationale dans les séances des 4 et 5 décembre 1874, pour appuyer le projet de loi présenté par M. le comte Jaubert sur La liberté de l'enseignement supérieur*, Paris, Douniol, 1874; *Discours prononcés par Mgr L'Évêque d'Orléans à l'Assemblée Nationale dans les séances des 15 mars, 28 mai, et 7, 12, 14 et 16 juin 1875 pour appuyer le projet de loi présenté par M. le comte Jaubert sur La liberté de l'enseignement supérieur*, Paris, Douniol, 1875.

⁶⁶ *Ibid.*, p. 29.

⁶⁷ *Discours prononcés par Mgr L'Évêque d'Orléans à l'Assemblée Nationale dans les séances des 4 et 5 décembre 1874, pour appuyer le projet de loi présenté par M. le comte Jaubert sur La liberté de l'enseignement supérieur*, cit., p. 6.

⁶⁸ Cfr. *Discours prononcés par Mgr L'Évêque d'Orléans à l'Assemblée Nationale dans les séances des 15 mars, 28 mai, et 7, 12, 14 et 16 juin 1875 pour appuyer le projet de loi présenté par M. le comte Jaubert sur La liberté de l'enseignement supérieur*, cit., pp. 42-43.

libere per iniziativa dei cattolici a Parigi, Lione, Lille, Angers e Tolosa⁶⁹. Leone XIII elogiò l'operato del vescovo d'Orléans con due *bref* inviati il 19 luglio 1875 e il 5 febbraio 1877⁷⁰.

4. L'educazione femminile

La prospettiva di Dupanloup in merito all'educazione femminile è stata oggetto di una serie di studi, a motivo della sua rilevanza nel pensiero cattolico e non⁷¹. I principali testi in cui svolse le sue posizioni su questi temi furono *Quelques conseils aux femmes chrétiennes sur le travail intellectuel qui leur convient*, presente nell'ultimo tomo di *De la haute éducation, Femmes studieuses et femmes savantes* (1869), *Femmes studieuse* (1869), e poi nelle opere postume: le *Lettres sur l'éducation des filles et sur les études qui conviennent aux femmes dans le monde* (1879), le *Conférence aux femmes chrétiennes* (1881), *Les vocations différentes de la femme: l'union conjugale, le célibat, la vie religieuse, la direction* (1908).

Nell'approccio di Dupanloup al tema si possono cogliere le influenze di Fénelon, ma anche del circuito cattolico liberale, che in quegli anni stava maturando una nuova prospettiva sul ruolo della donna. Valorizzando le capacità intellettuali del mondo femminile, difese il diritto all'istruzione delle giovani, sottolineando i vantaggi per la vita morale e spirituale delle donne e di tutta la società. Per le ragazze prospettava una formazione solida, caratterizzata da studi letterari, artistici, musicali, storici, ed esortava allo studio del diritto e, naturalmente, della religione. Oltre alla lettura dei grandi classici⁷², sosteneva che la filosofia dovesse avere uno spazio centrale nell'educazione femminile. Negli ultimi anni prima della sua scomparsa, Dupanloup aveva l'intenzione di comporre un'opera su questo tema, delineando un piano di studi per le giovani allieve⁷³, che non ebbe, tuttavia, il tempo di stendere.

⁶⁹ P.H. Prelot, *Naissance de l'enseignement supérieur libre: la loi du 12 juillet 1875*, Paris, PUF, 1987; Mayeur, *Histoire générale de l'enseignement et de l'éducation. De la Révolution à l'École républicaine*, cit., pp. 495-496; D. Moulinet, *Laïcité catholique et société française. Les Comités catholique (1870-1905)*, Paris, Cerf, 2008, pp. 386-390.

⁷⁰ Chapon, *Mgr Dupanloup et la liberté: sa vraie doctrine*, cit., p. 266.

⁷¹ Cfr.: F. Mayeur, J. Gadille (edd.), *Éducation et images de la femme chrétienne en France au début du XX^{ème} siècle: entretiens de La Combe de Lancey (Isère) 8, 9, 10 octobre 1978 à l'occasion du centenaire de la mort de Mgr Dupanloup*, Lyon, L'Hermès, 1980; A. Dordoni, *La "Donna studiosa" di Dupanloup nella riflessione di Geremia Bonomelli*, in L. Pazzaglia (ed.), *Cattolici, educazione e trasformazioni socio-culturali in Italia tra Otto e Novecento*, Brescia, La Scuola, 1999, pp. 211-238; F. Mayeur, *L'éducation des filles en France au XIX^e siècle*, Paris, Perrin, 2008, pp. 67-84.

⁷² M. De Giorgi, *Il modello cattolico*, in Dury, Perrot (edd.), *Storia delle donne in Occidente*, cit., pp. 170-171.

⁷³ Cfr. L. Desbordes, *Les écrits de Mgr Dupanloup sur la haute éducation des femmes*, in

Le posizioni del vescovo d'Orléans, che si tradussero in un impegno educativo e di apostolato verso numerose giovani e madri di famiglia⁷⁴, vanno comprese nel più ampio progetto di «riconquista» cristiana della società. Anche in Dupanloup, infatti, era matura la convinzione che la donna avesse ormai un ruolo indispensabile per i destini del cattolicesimo. Di fronte ad una chiesa sempre più «femminile»⁷⁵, la nuova evangelizzazione passava per la formazione delle giovani. Era dunque il tempo di: «Réveiller parmi les femmes du monde le sens de la vraie et grande vertu chrétienne»⁷⁶. I tempi, tuttavia, obbligavano a superare un cristianesimo fatto solo di pratiche pie e di sentimentalismo, per giungere ad una fede solida e ricca di ragioni che potesse opporsi all'apostasia dilagante. In questo senso, per «savoir sa religion»⁷⁷, le giovani dovevano in primo luogo «fortifier la raison». «La femme ignorante – chiariva il pedagogista francese – même pieuse, est pour le combat divin un soldat inutile»⁷⁸.

In un contesto dove ancora pesava la misoginia di autori come Rousseau, De Maistre e Molière, le posizioni di Dupanloup rappresentarono un forte impulso al progresso della formazione delle giovani⁷⁹. Come ha osservato Emile Faguet, egli fu un vero e proprio «precursore del femminismo»⁸⁰. Che ciò avvenisse per opera di un uomo di Chiesa appariva, soprattutto ai suoi estimatori cattolici, particolarmente significativo⁸¹.

Le posizioni del sacerdote savoirdo sono state anche al centro di alcune critiche. Gli appunti mossi hanno riguardato in prevalenza due aspetti: la quasi esclusiva attenzione per le classi più agiate e la resistenza a prospettare per

Mayeur, Gadille (edd.), *Éducation et images de la femme chrétienne en France au début du XX^{ème} siècle: entretiens de La Combe de Lancey (Isere) 8, 9, 10 octobre 1978 a l'occasion du centenaire de la mort de Mgr Dupanloup*, cit., p. 33.

⁷⁴ Cfr. Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. III, pp. 399-441; Faguet, *Mgr Dupanloup: un grand évêque*, cit., pp. 189-234.

⁷⁵ Il fenomeno della «femminilizzazione» del cattolicesimo riguardò anche la diocesi di Orléans. Cfr. Marcilhacy, *Le Diocèse d'Orléans sous l'épiscopat de Mgr Dupanloup (1849-1878)*, cit., pp. 312-314.

⁷⁶ Lagrange, *Vie de Mgr Dupanloup*, cit., Vol. II, p. 225.

⁷⁷ J. Gadille, J. Godel, *L'héritage d'une pensée en matière d'éducation des femmes*, in Mayeur, Gadille (edd.), *Éducation et images de la femme chrétienne en France au début du XX^{ème} siècle: entretiens de La Combe de Lancey (Isere) 8, 9, 10 octobre 1978 a l'occasion du centenaire de la mort de Mgr Dupanloup*, cit., p. 19.

⁷⁸ Desbordes, *Les écrits de Mgr Dupanloup sur la haute éducation des femmes*, cit., p. 25.

⁷⁹ Cfr. Gadille, Godel, *L'héritage d'une pensée en matière d'éducation des femmes*, cit., p. 19; Mayeur, *Histoire générale de l'enseignement et de l'éducation. De la Révolution à l'École républicaine*, cit., pp. 139-140; A. Ascenzi, *Il plutarco delle donne*, Macerata, eum, 2009, p. 47.

⁸⁰ Faguet, *Mgr Dupanloup: un grand évêque*, cit., p. 179.

⁸¹ Facendo un paragone tra le posizioni di Dupanloup e quelle di De Maistre, Bonomelli osservava: «È bello vedere il laico, filosofo, modello di credente cattolico, scrittore inarrivabile, alle prese con un Vescovo per nulla a lui inferiore e sopra un punto sì importante e sì difficile come questo della educazione della donna: più bello ancora il vedere laico, gentiluomo e già ambasciatore, negare alla donna il diritto e la convenienza di correre il campo delle scienze e delle arti belle, e il Vescovo aprirglielo e incoraggiarvela». F. Dupanloup, *La donna studiosa*, Milano, Cogliati, 1896, p. XIV.

la donna un impegno al di fuori delle mura domestiche. Dupanloup, infatti, esortava la donna ad educare sé e la sua famiglia, prepararsi intellettualmente, financo a pubblicare studi storici o romanzi, ma sempre «nei limiti precisi di quello che è il posto che essa deve occupare col matrimonio e con la maternità»⁸². Nonostante ciò, in confronto al clima coevo, le sue posizioni furono senza dubbio innovative. Le sue premesse condussero, in un secondo momento, alcuni dei suoi epigoni a ripensare in modo più radicale il ruolo della donna. Già il vescovo Bonomelli, presentando un libro del pedagogista francese, arrivò ad auspicare un'azione ed un'influenza «politica» delle donne⁸³. Le posizioni di Dupanloup ebbero uno sviluppo analogo anche nel cattolicesimo francese⁸⁴.

5. *Diffusione in Italia*

Una prima circolazione delle opere di Dupanloup passò per il gruppo cattolico liberale, che nelle tesi del pensatore francese, da quelle politiche a quelle scolastiche, trovò una costante fonte di ispirazione. Il vescovo d'Orléans ebbe rapporti amicali ed epistolari con Cesare Cantù, che invitò, peraltro, a scrivere per il «Correspondant»⁸⁵. I contatti e le occasioni di collaborazione furono numerose. Davide Norsa, uno studioso legato al moderato toscano Augusto Conti, tradusse il saggio *Dove andiamo?*, con una lettera di presentazione e ringraziamento dello stesso vescovo d'Orléans⁸⁶. Le esperienze pubblicitiche dei cattolici liberali, dagli «Annali Cattolici» sino alla «Rassegna Nazionale»⁸⁷, confermano questa prossimità. Tra gli esponenti di quest'ultimo periodico, il vescovo Bonomelli fu particolarmente affascinato dalle posizioni di Dupanloup, anche grazie al legame con il cenacolo di Lacombe, che dopo la morte raccolse i discepoli del sacerdote savoiano⁸⁸. La stima del prelado emerge chiaramente

⁸² M.L. Trebiliani, *Modello mariano e immagine della donna nell'esperienza educativa di don Bosco*, in F. Traniello (ed.), *Don Bosco nella storia della cultura popolare*, Torino, Sei, 1987, pp. 194-195.

⁸³ Dupanloup, *La donna studiosa*, cit., pp. XV-XVI.

⁸⁴ Cfr. J. Gadille, *La transmission de l'héritage*, in Mayeur, Gadille (edd.), *Éducation et images de la femme chrétienne en France au début du XX^{ème} siècle: entretiens de La Combe de Lancey (Isere) 8, 9, 10 octobre 1978 a l'occasion du centenaire de la mort de Mgr Dupanloup*, cit., pp. 61-74.

⁸⁵ Cfr. F. Kaucisvili Melzi d'Eril (ed.), *Cesare Cantù e i cattolici liberali francesi. Cinque corrispondenze con François-Alexis Rio, Albert Du Boys, Camille de Meaux, Mons. Félix Dupanloup, Maxime de la Rocheterie*, Milano, Edizioni comune di Milano Amici del Risorgimento, 1994.

⁸⁶ F. Dupanloup, *Dove andiamo? con lettera dell'A. al traduttore Davide Norsa*, Firenze, R. Ricci, 1876.

⁸⁷ Cfr. A. Marrone, *Pedagogia e scuola nella «Rassegna Nazionale» (1879-1915)*, «History of Education & Children's Literature», vol. VIII, n. 2, 2013, p. 231.

⁸⁸ Cfr. Dordoni, *La «Donna studiosa» di Dupanloup nella riflessione di Geremia Bonomelli*,

nell'introduzione a *La donna studiosa*, opera di cui scrisse che «dovrebb'essere sul tavolo di tutte!»⁸⁹. Nello stesso testo, parlò de *L'ateismo e il pericolo sociale* come di «un saggio profetico». Si trattò, non a caso, di un libro tradotto in Italia dall'Ufficio della «Rivista Universale»⁹⁰. Sempre in campo cattolico liberale, ma in questo caso sul fronte rosminiano, anche Carlo Uttini, educatore e studioso attento all'infanzia e all'educazione delle giovani, mostrò nelle sue opere una certa conoscenza e stima per le opere di Dupanloup⁹¹.

Molto diversa fu l'accoglienza degli intransigenti, che fecero proprie le critiche già mosse al pensatore savoirdo dall'«Univers» e dai gruppi più reazionari del cattolicesimo francese. Nel campo scolastico, alcuni esponenti dell'Opera dei Congressi contestarono la linea di Dupanloup e considerarono tanto la Falloux quanto la legge sull'insegnamento superiore come un deleterio compromesso. Se, infatti, da una parte si era ottenuto maggiore spazio per gli istituti cattolici, dall'altra si avallava un sistema scolastico plurale considerato non solo pericoloso, ma contrario alla prerogativa educativa della Chiesa⁹². Solo più tardi, quando il clima tra i cattolici era ormai divenuto più disteso ed era più diffusa una posizione meno pregiudizialmente avversa allo Stato, la «Civiltà Cattolica» poteva elogiare le «conquiste» del pedagogista francese relative alla libertà della scuola⁹³.

Per quanto attiene le idee relative all'educazione femminile, ebbe un certo ruolo nella loro diffusione una rivista di sentimenti cattolici liberali: «La Donna e la famiglia». Fondata a Genova nel 1863, ebbe anche una versione parigina intitolata «La femme et la famille», apprezzata e sostenuta direttamente dal Dupanloup⁹⁴. La battaglia del vescovo a favore dell'istruzione e dell'educazione delle giovani persuase in particolare Fortunata Bottaro, che fu direttrice del periodico⁹⁵. Il legame con le «femministe» cattoliche italiane durò a lungo.

cit., p. 226.

⁸⁹ Dupanloup, *La donna studiosa*, cit., p. IX.

⁹⁰ F. Dupanloup, *L'ateismo e il pericolo sociale*, Genova-Firenze, Ufficio della Rivista Universale, 1867.

⁹¹ Cfr. C. Uttini, *Educhiamo! Scritti vari*, Firenze, Sansoni, 1874, Vol. I, pp. 151, 153-154, 161-162; C. Uttini, *Nuovo compendio di pedagogia e didattica: ad uso delle scuole e delle famiglie*, Torino, Libreria scolastica di Grato-Scioldo, 1884, p. IX.

⁹² L. Pazzaglia, *Educazione e scuola nell'Opera dei Congressi (1874-1904)*, in L. Pazzaglia, R. Sani (edd.), *Scuola e società dell'Italia unita dalla Legge Casati al Centro-Sinistra*, Brescia, La scuola, 2001, p. 98.

⁹³ Cfr. *Il congresso cattolico di Genova*, «La Civiltà Cattolica», quaderno 1388, vol. II, 1908, pp. 147-148.

⁹⁴ Milan, *Donna, famiglia, società. Aspetti della stampa femminile cattolica in Italia tra '800 e '900*, cit., p. 27.

⁹⁵ «Le teorie pedagogiche del vescovo di Orléans impressionarono vivamente Fortunata Bottaro, la quale attinse ampiamente dalle sue opere, tanto che da quel momento i suoi scritti ne divennero soprattutto una rilettura puntuale, arricchita da riflessioni personali». *Ibid.*, p. 29.

Ancora a cavallo tra la fine dell'Ottocento e l'inizio del nuovo secolo, le sue posizioni ispirarono l'*Unione Romana* e la sua rivista, «l'Ora presente»⁹⁶.

Anche una serie di «plutarci» femminili contribuirono a promuovere le sue tesi sull'educazione delle giovani⁹⁷. Si trattò di un genere letterario nel quale l'influenza di Dupanloup continuò sino ai primi decenni del nuovo secolo⁹⁸. Appare sintomatico che, tra i volumi regalati da Pio X nel 1927 alla presidente dell'Unione donne di azione cattolica italiana, vi erano pure titoli del vescovo d'Orléans⁹⁹.

Una certa impronta della lezione di Dupanloup è rintracciabile anche nella riflessione pedagogica del gruppo salesiano. Sebbene negli scritti del santo piemontese manchino riferimenti espliciti al pensatore francese, diversi concetti accomunano il pensiero educativo di Don Bosco a quello del vescovo d'Orléans: l'esortazione ad educare i giovani con amore autentico e sollecito¹⁰⁰, l'impostazione educativa dei seminari, l'uso di alcune espressioni¹⁰¹. Commentando il noto scritto, *Il sistema preventivo nella educazione della gioventù*, Pietro Braido, osservò che una «suggerzione potrebbe essere giunta a Don Bosco anche attraverso la conoscenza, almeno sommaria, dell'opera pedagogica più impegnativa di Mons. Dupanloup, *De l'éducation*, dove ricorrono le formule “disciplina repressiva”, “disciplina preventiva”, “disciplina direttiva”»¹⁰². È possibile, inoltre, che il santo piemontese abbia attinto dalla riflessione del vescovo d'Orléans per le sue posizioni sull'insegnamento dei classici pagani nelle scuole cattoliche¹⁰³. Espliciti riferimenti sono invece presenti nelle opere dei primi pedagogisti salesiani¹⁰⁴. Gli *Appunti di pedagogia sacra* (1897) di Barberis riprendono diversi contenuti del prelado francese¹⁰⁵, così come la *Storia della pedagogia in Italia* (1883) di Cerruti¹⁰⁶.

⁹⁶ R. Fossati, *Élites e nuovi modelli religiosi nell'Italia tra Otto e Novecento*, Urbino, QuattroVenti, 1997, p. 96.

⁹⁷ Si veda per esempio: J. Berthier, *La madre secondo il cuore di Dio, ossia doveri della madre cristiana*, Torino, Tipografia salesiana, 1890.

⁹⁸ Trebiliani, *Modello mariano e immagine della donna nell'esperienza educativa di don Bosco*, cit., p. 194.

⁹⁹ Cfr. De Giorgi, *Il modello cattolico*, cit., p. 173.

¹⁰⁰ P. Stella, *Don Bosco nella storia della religiosità cattolica. Vita e opere*, Roma, LAS, 1979, p. 246.

¹⁰¹ P. Stella, *Don Bosco nella storia della religiosità cattolica. Mentalità religiosa e spiritualità*, Roma, LAS, 1981, p. 458.

¹⁰² P. Braido, *L'esperienza pedagogica preventiva nel secolo XIX. Don Bosco*, in Id. (ed.), *Esperienze di pedagogia cristiana nella storia*, Roma, LAS, 1981, p. 317.

¹⁰³ «L'impulso maggiore per don Bosco dovette venire dalla Francia, anch'essa segnata dalla polemica sugli studi latini dei classici cristiani, suscitando numerose pubblicazioni di testi per le scuole». G. Proverbio, *La scuola di don Bosco e l'insegnamento del latino (1850-1900)*, in Traniello (ed.), *Don Bosco nella storia della cultura popolare*, cit., p. 181.

¹⁰⁴ G. Chiosso, *Alfabeti d'Italia*, Torino, Sei, 2011, p. 142.

¹⁰⁵ J.M. Prelezzo, *Giuseppe Allievo negli scritti pedagogici salesiani*, «Orientamenti pedagogici», n. 3, maggio-giugno 1998, p. 411.

¹⁰⁶ D. Cerruti, *Storia della pedagogia in Italia*, Torino, Tipografia e libreria salesiana, 1883, p. 6.

La larga diffusione del pensiero del Dupanloup in Italia è confermata dalla significativa quantità di saggi che furono tradotti da una serie di case editrici nelle varie parti del Paese¹⁰⁷. Il primo titolo pubblicato fu la summa pedagogica del vescovo, stampata nel 1851 dalla casa editrice dello Stato Pontificio Bencini. Uscì solo il primo tomo, intitolato *Dell'educazione in generale*, al prezzo di otto Paoli¹⁰⁸. Lo stesso volume fu tradotto l'anno seguente dalla Marsigli e Rocchi di Bologna¹⁰⁹, mentre l'intera opera fu pubblicata dalla Fiaccadori, che diede alle stampe il primo tomo nel 1868¹¹⁰, e il secondo ed il terzo nel 1869¹¹¹. Anche altre opere pedagogiche del vescovo furono proposte al pubblico italiano. Nel 1852 la Rossi di Modena curò il saggio *Sullo studio dei classici antichi: lettera di monsignor Dupanloup vescovo d'Orleans ai direttori di stabilimenti religiosi e civili*¹¹², e a Prato uscì nel 1869 la prima traduzione di *Donne dotte e donne studiose*¹¹³.

Grande interesse suscitavano le opere catechistiche e religiose, che al tempo rappresentavano un'importante fetta del mercato editoriale. Nel 1870, Clemente De Angelis pubblicò *L'opera per eccellenza ossia Trattenimenti sul catechismo*¹¹⁴, da cui poi Farrocco ispirò la stesura de *L'opera per eccellenza di monsignor Dupanloup in una povera parrocchia della Diocesi di Montecassino*¹¹⁵. Il *Catechismo cristiano* fu pubblicato a Firenze nel 1866¹¹⁶, mentre nel 1873 la Fiaccadori stampò in tre volumi il *Metodo generale di Catechismo*¹¹⁷. Nel 1906 uscì una seconda edizione riveduta e ampliata. Furono pubblicati altri saggi con a tema questioni religiose e pastorali¹¹⁸. Il suo pensiero su tali temi

¹⁰⁷ Si veda: G. Chiosso (ed.), *TESEO. Tipografi e editori scolastico-educativi dell'Ottocento*, Milano, Editrice Bibliografica, 2003, pp. 159-160, 202-204, 219-220, 632-634, 348-349, 355-356, 342-343.

¹⁰⁸ F. Dupanloup, *Dell'educazione, Tomo I*, Firenze, Tipografia di F. Bencini, 1851.

¹⁰⁹ F. Dupanloup, *Della educazione: volume unico*, Bologna, Marsigli e Rocchi, 1852.

¹¹⁰ F. Dupanloup, *Dell'educazione in generale*, Parma, Fiaccadori, 1868.

¹¹¹ F. Dupanloup, *Dell'autorità e del rispetto nell'educazione*, Parma, Fiaccadori, 1869; Id., *Degli uomini addetti all'educazione*, Parma, Fiaccadori, 1869.

¹¹² F. Dupanloup, *Sullo studio dei classici antichi: lettera di monsignor Dupanloup vescovo d'Orleans ai direttori di stabilimenti religiosi e civili*, Modena, Coi tipi di A. Rossi, 1852.

¹¹³ F. Dupanloup, *Donne dotte e donne studiose*, Prato, Tip. R. Guasti, 1869.

¹¹⁴ F. Dupanloup, *L'opera per eccellenza ossia Trattenimenti sul catechismo*, versione del prof. D. Clem. De Angelis, Parma, Fiaccadori, 1870, Vol. II.

¹¹⁵ G. Farrocco, *L'opera per eccellenza di monsignor Dupanloup in una povera parrocchia della Diocesi di Montecassino*, Siena, Tip. arcivescovile S. Bernardino, 1888.

¹¹⁶ F. Dupanloup, *Catechismo cristiano, ossia esposizione della dottrina di Gesù Cristo offerta agli uomini di mondo da mons. Felice Dupanloup; colla giunta del compendio e sommario di tutta la dottrina del simbolo, di Bossuet; traduzione approvata dall'Autore*, Firenze, Società toscana per la diffusione di buoni libri, 1866.

¹¹⁷ F. Dupanloup, *Metodo generale di catechismo: raccolto dalle opere dei ss. padri e dottori della Chiesa e dai più celebri catechisti*, Parma, Fiaccadori, 1873.

¹¹⁸ F. Dupanloup, *Il progresso per mezzo del cristianesimo: conferenze tenute in nostra signora di Parigi*, Milano, Ernesto Oliva editore, 1862; Id., *Il barcaiuolo della Galilea*, Bologna, Direzione delle piccole letture cattoliche, 1864; Id., *Lettera sul futuro Concilio Ecumenico diretta dal vescovo di Orléans al clero della sua diocesi / traduzione italiana fatta sulla 4. edizione francese da*

ebbe così tanto successo che gli organizzatori del primo Congresso catechistico italiano, tenutosi a Piacenza nel 1889, inviarono una richiesta a Lagrange, nel frattempo eletto vescovo di Chartres, pregandolo di spiegare in un contributo il metodo catechistico di Dupanloup. La lettera inviata dal prelado fu poi oggetto di discussione tra i partecipanti¹¹⁹.

Oltre alle opere pedagogiche ed educative, in Italia ebbero ampio successo le opere legate alla Questione romana. *Della sovranità temporale del Papa* fu tradotto in varie città: Roma, Napoli, Milano, Modena, Perugia, Padova. Nel 1859, di fronte alla propaganda anticlericale del governo provvisorio, un gruppo di cattolici bolognesi decise di diffondere alcuni saggi per chiarire le posizioni della Chiesa sulla questione temporale e sui diritti del Papa. Tra le altre opere, decisero di stampare *Roma, l'Italia e l'Europa senza il Papa* di Dupanloup. Da quella riunione nacque pure l'iniziativa delle «Piccole letture cattoliche»¹²⁰. Anche *La convenzione del 15 settembre e l'enciclica dell'8 dicembre* fu pubblicata in diverse città. Nel 1865 fu stampata a Roma, Napoli, Firenze, Genova e Venezia. Una serie di editori diedero alle stampe le altre opere di Dupanloup sul rapporto Stato-Chiesa, e sulla particolare situazione italiana¹²¹. Furono poi pubblicati diversi discorsi, sermoni e lettere su varie tematiche¹²².

Giovanni Viceconte, Napoli, tip. di G. Argento, 1869; Id., *Il matrimonio cristiano*, Torino, Enrico Moreno, 1870; Id., *Sulle profezie contemporanee, con la opinione di più concilii dei dottori della Chiesa e del nostro Santo Padre il Papa*, Modena, Tip. dell'Immacolata concezione, 1874.

¹¹⁹ Cfr. *Atti e Documenti del primo Congresso Catechistico*, «Rassegna Nazionale», I settembre 1890, p. 191.

¹²⁰ Cfr. I. Piazza, *Buoni libri per tutti: l'editoria cattolica e l'evoluzione dei generi letterari nel secondo Ottocento*, Milano, Unicopli, 2009, p. 181.

¹²¹ F. Dupanloup, *Lettera di monsignor Dupanloup vescovo d'Orleans ad un cattolico: sullo smembramento onde sono minacciati gli Stati Pontifici*, Milano, Boniardi-Pogliani di Ermenegildo Besozzi, 1860; Id., *La questione romana: protesta e lettere di monsignor Dupanloup vescovo d'Orleans*, Lugano, Tip. Veladini e Comp, 1860; Id., *L'Orazione funebre dei volontari cattolici dell'esercito pontificio morti per la difesa della Santa Sede*, Roma, Tip. Monaldi, 1860 (opere poi stampata anche a Lucca, Nizza, Bologna); Id., *Intorno l'opuscolo Il Papa ed il Congresso*, Venezia, G.B. Merlo, 1860; Id., *Roma, l'Italia, l'Europa senza il Papa, traduzione italiana dell'avv. Giuseppe Bastia*, Bologna, Tip. delle Scienze, 1861; Id., *Lettera di mons. Felice Dupanloup al signor visconte De Laguerroniere intorno all'opuscolo La Francia, Roma e l'Italia*, Verona, Tip. di Antonio Merlo, 1861; Id., *Lettera di monsig. vescovo d'Orleans al sig. Minghetti ministro per le finanze di Re Vittorio Emanuele intorno la spogliazione della Chiesa a Roma e in Italia* Roma, Roma, Tip. Ed. Romana, 1874.

¹²² F. Dupanloup, *Lettera di al signor Grandguillot redattore in capo del Constitutionnel*, Genova, Stabilimento tipografico di Giacomo Caorsi, 1860; Id., *Parole di monsignor vescovo di Orleans dette nella Cattedrale di Santa Croce al suo ritorno da Roma li 27 luglio 1862; Lettera pastorale del medesimo con cui trasmette al clero della sua diocesi l'allocuzione pontificia e l'indirizzo episcopale dei 9 giugno*, Roma, tipi dell'Osservatore Romano, 1862; Id., *Elogio funebre del generale De Lamoriciere pronunziato in Nantes il 17 ottobre 1865*, Firenze, tip. virgiliana per M. Casini, 1865; Id., *Il centenario di Voltaire: lettere dieci / di mons. Felice Dupanloup vescovo d'Orleans ai membri del Consiglio municipale di Parigi; tradotte in italiano da Uberti Giansevero*, Milano, Libreria Ambrosiana, 1878.

Un altro notevole contributo alla diffusione delle opere di Dupanloup, soprattutto a cavallo tra l'Ottocento e il Novecento, giunse dalla Cogliati di Milano, una casa editrice vicina al circuito cattolico liberale. La sua prima traduzione uscì nel 1881. Si trattò de *La frammassoneria*, opera in cui Dupanloup si occupò della storia e dei riti dell'associazione segreta, riferendosi alle logge francesi e belghe¹²³. Nel 1891 Giuseppe D'Isengard, peraltro collaboratore della «Rassegna Nazionale», curò le *Lezioni ed esempi d'un eminente catechista*¹²⁴, un'antologia delle opere di Dupanloup. Ancora la Cogliati stampò nel 1896 la citata *Donna studiosa*, affidando al vescovo di Cremona, Geremia Bonomelli il compito di introdurla. Il commento del prelado fu pubblicato sulla «Rassegna Nazionale», con una breve presentazione di Giuseppe Grabinski¹²⁵. Nel 1907 fu data alle stampe una nuova edizione senza apportare nessuna modifica. Nel 1897 la Cogliati curò la traduzione delle *Conferenze alle Donne cristiane*¹²⁶, tradotta da Luisa Croce, con prefazione del sacerdote Adalberto Catena. Nel 1903 dedicò un piccolo libro alla vita del vescovo, curato da Meregalli. Nella prima parte è proposto un breve saggio dell'autore, mentre nella seconda si riportano due capitoli della vita di Lagrange dedicati alla conversione di Talleyrand¹²⁷. Nell'introduzione si «promette» che a quest'anticipazione sarebbe seguita la traduzione integrale della biografia, ma in realtà non fu mai stampata¹²⁸.

¹²³ F. Dupanloup, *La frammassoneria, studii di Monsignor Dupanloup Vescovo d'Orléans preceduti da un breve di S.S. Pio IX all'autore con prefazione del Sac. Carlo Locatelli*, Milano, Cogliati, 1881.

¹²⁴ F. Dupanloup, *Lezioni ed esempi d'un eminente catechista, ossia il catechismo secondo Mons. Dupanloup, compilazione del Sa. Giuseppe D'Isengard della Congregazione della Missione*, Milano, Cogliati, 1891.

¹²⁵ G. Grabinski, *La donna studiosa*, «Rassegna Nazionale», I novembre 1896, pp. 103-114.

¹²⁶ F. Dupanloup, *Conferenze alle Donne cristiane. Traduzione di Luisa Croce, con prefazione del sac. Adalberto Catena*, Milano, Cogliati, 1897.

¹²⁷ L. Meregalli, *Dupanloup, I: nella sua fisionimia generale (L. Meregalli), II: nella conversione del principe di Talleyrand (mons. Lagrange)*, Milano, Cogliati, 1903.

¹²⁸ «Gentilmente autorizzati dalla Casa Editrice Ch. Poussielgue di Parigi, abbiamo creduto mandare innanzi due dei più brillanti capitoli della Vita di monsignor Dupanloup scritta dal Lagrange, prima di metter mano alla pubblicazione di tutta quella voluminosa ma splendida Vita che ora si sta traducendo. [...] Questo saggio è una promessa di qualche cosa di più, della traduzione completa della vita di Dupanloup, che dovrebbe comparire il luce in un avvenire molto prossimo se la parola dataci non mentirà». *Ibid.*, pp. 5-6.

«Ignorancia e incivilización, o miseria y despotismo». Pueblos indígenas y escuelas de primeras letras vistos desde el poder estatal en Oaxaca, México, 1825-1889

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«Ignorance and uncivilization, or misery and despotism». Indigenous people and primary schools seen from the state power in Oaxaca, Mexico, 1825-1889

ABSTRACT: The European Enlightenment which began disembarking in the New Spain by the end of the 18th century carried cogent ideas about the importance of building a public education system for the prosperity and strength of a State. By the end of the Independence, Mexican politicians and intellectuals undertook a project for transforming the subjects of the Crown into citizens of the Republic. The significant presence of indigenous peoples in Mexico caused heated discussion in the decision-making arena of power, because their languages, customs, and their ways of producing and conceiving life were considered an obstacle in the route to modernity. In the end, dealing with the 'indigenous matter' in the classrooms was the prevailing resolution of the debate. In the southern State of Oaxaca, the presence of 17 ethnic groups which in the first decades of the 19th century represented 90% of the total population, also accounted for strong debate and discussion among politicians and intellectuals. The dominating minority which was worried about ignorance, incivility, immorality and the vices attributed to the indigenous people, opted for overcoming the 'Indian obstacle' by building a public education system in charge of instructing and alphabetizing the people. This text traces the public image of the Indian and shows how the Oaxacan 19th-century-elite repeatedly delivered a demand for education to transform him in order to 'mould the Citizen'. This was done by recovering the official speeches reproduced in the administration memoirs, and the educational policies implemented by the state governments for the elementary level, from the Mexican Independence and until the ends of the 19th century.

EET/TEE KEYWORDS: Ethnic Group; Cultural Assimilation; Educational Policy; Mexico; XIX Century.

Premisa

La Ilustración que desde Europa, a finales del siglo XVIII, empezó a desembarcar en tierra Novohispana traía, entre otras, ideas contundentes sobre la importancia de la construcción de un sistema educativo público para la prosperidad y la fortaleza de un Estado. Jovellanos, en 1802, comenzaba su Memoria sobre la educación con estas palabras:

¿Es la instrucción pública el primer origen de la prosperidad social? Sin duda. Ésta es una verdad no bien reconocida todavía, o por lo menos no bien apreciada: pero es una verdad. [...] Las fuentes de prosperidad son muchas, pero todas nacen de un mismo origen: es la instrucción pública [...]. Con la instrucción todo se mejora y florece; sin ella todo decae y se arruina en un Estado¹.

Al igual que los filósofos ilustrados, los diputados de las Cortes de Cádiz contemplaron la instrucción pública como la condición necesaria del progreso social y, al concluir la revolución de independencia, también políticos e intelectuales mexicanos se dedicaron a consolidar y difundir teorías y propuestas sobre el tema.

La disolución de los estamentos, la individualización de la sociedad y la concepción de un Estado que debía de perseguir la modernidad, determinaron la idea de que el progreso y la fortaleza de la nación dependían de las aportaciones de cada individuo y de que sobre el Estado recaía la responsabilidad de cuidar de las capacidades de cada uno de ellos a través de su intervención sobre la infancia².

A partir de ese momento, la educación se convirtió en un asunto de Estado y fue concebida como medio de progreso económico y de integración social. Gracias a ella, los gobiernos llegarían a formar ciudadanos racionales y trabajadores capacitados, conocedores de sus obligaciones y respetuosos con el orden político y social que suponía el liberalismo y, finalmente, miembros identificados con la nación.

El proyecto de transformar a los súbditos de la Corona en ciudadanos de la República necesitó de un prolongado periodo de gestación y maduró a lo largo de todo el siglo XIX. Su realización precisó del empeño de los gobiernos en turno, quienes fueron diseñando políticas educativas cada vez más complejas. Éstas, acordes al desarrollo teórico y práctico de las ciencias pedagógicas y de los sistemas educativos, debieron en última instancia responder a las necesidades de la nación en consolidación.

En México, la significativa presencia de pueblos indios provocó encendidas discusiones en los espacios del poder porque sus idiomas, costumbres, modos de

¹ Citado en E. Martín Criado, *La escuela sin funciones. Crítica de la sociología de la educación crítica*, Barcelona, Ediciones Bellaterra, 2010, p. 206.

² *Ibid.*, pp. 205-207.

producción y de concebir la vida, eran considerados un obstáculo en el camino a la modernidad; sin embargo, frente a las propuestas de un exterminio violento o la desaparición a través de la unión con migrantes blancos y católicos, prevaleció la determinación de resolver la cuestión indígena en las aulas escolares³.

En el estado de Oaxaca, la presencia de 17 grupos étnicos que representaban para las primeras décadas del siglo XIX el 90% del total de la población⁴, suscitó entre políticos e intelectuales ciertas polémicas y muchas discusiones. La prensa local y los documentos oficiales fueron los canales de expresión de una minoría dominante preocupada por la ignorancia, la incivilización, la inmoralidad y los vicios que atribuían al indio, el cual fue definido (e imaginado) como bárbaro, descalzo y desnudo, arraigado a sus costumbres, desgraciado, supersticioso, oprimido y esclavo.

Como para la Nación, en Oaxaca también se optó por superar el “obstáculo indio” con la edificación de un sistema público de escolarización que se hiciera cargo de ilustrar y alfabetizar a los pobladores.

El presente texto se propone rastrear la imagen pública del indio y evidenciar cómo la elite decimonónica oaxaqueña entregó a la educación, reiteradamente, la tarea de transformarlo para así, “construir al ciudadano”. Para ello se rescataron los discursos oficiales reproducidos en las memorias administrativas⁵ y las políticas educativas implementadas por los gobiernos estatales para el nivel elemental, desde la independencia hasta las postrimerías del siglo XIX.

Las dos leyes estatales de educación de 1825 y 1889, serán los extremos de referencia en el análisis de un periodo histórico marcado por los devenires propios de la educación primaria en la entidad.

Considero que esta propuesta se ubica en el entrecruce de diversos intereses y temáticas abordadas por los estudiosos del siglo XIX oaxaqueño. Podemos pensar en la historia de la educación, la historia política y, de manera tangencial, en la etnohistoria que, caracterizadas por diferencias metodológicas y analíticas importantes, han contribuido en las últimas tres décadas a construir una historiografía novedosa y sugerente. Se trata de estudios recientes que han sabido recurrir a conceptos y paradigmas propios de otras disciplinas como la antropología, la sociología, la economía o la ciencias políticas; que se han caracterizado por una lectura nueva de viejas fuentes o el rescate de fuentes desconocidas; que han enfocado la mirada a los grupos subalternos y reorientado sus preguntas sobre las realidades locales. Es así como, ahora, es posible explicar el pasado decimonónico de Oaxaca en función de los cambios y persistencia de

³ D. Traffano, *En torno a la cuestión indígena en Oaxaca: La prensa y el discurso de los políticos*, en C. Sánchez Silva (Coord.), *Historia, sociedad y literatura de Oaxaca*, Oaxaca, UABJO, IEEPO, 2004, pp. 123-134.

⁴ L. Reina Aoyama, *Camino de luz y sombra. Historia indígena de Oaxaca en el siglo XIX*, México, CIESAS, CDI, 2004, p. 42.

⁵ Las memorias administrativas reportan los informes que los Gobernadores presentaban anualmente a los respectivos Congresos.

las instituciones de gobierno, de las historias de las corporaciones religiosas, de las estrategias de vida de los pueblos indios, de las actividades productivas, de las estructuras sociales y de las culturas políticas de las comunidades indígenas entre la colonia y la república⁶.

Con respecto a la historiografía sobre educación, Oaxaca cuenta con una tradición importante de estudios de carácter general relativos a los acontecimientos salientes de la creación del sistema educativo estatal, la historia del Instituto de Ciencias y Artes, la formación de profesores o la intervención de renombrados pedagogos⁷. En los últimos años, el campo se ha enriquecido con trabajos sobre la educación de la mujer, la presencia de los colegios católicos, el desarrollo de la educación superior, la producción de catecismos políticos o el discurso oficial en favor de la educación para la construcción de la nación⁸. Finalmente, también la historiografía de la educación – permeable a las fuentes, las preguntas y los problemas propios de la etnohistoria –, ha empezado a proponer estudios y reflexiones sobre la escuela y los pueblos indios formulando interrogantes y esbozando explicaciones concernientes: la aplicación de las políticas educativas en áreas específicas del territorio estatal; las relaciones entre autoridades étnicas locales y actores involucrados en la educación; la apropiación y manipulación de las políticas educativas por parte de las comunidades indígenas; pueblos indios, leyes, pedagogías y aulas escolares en zonas rurales⁹.

⁶ Para una referencia exhaustiva de obras y autores ver: L. Arrijoa Díaz Viruel, *Crítica de libro*, «Historia Mexicana», vol. 60, n. 4, 2011, pp. 2157-2161.

⁷ A. Lamperière, *La formación de las elites liberales en el México del siglo XIX: Instituto de Ciencias y Artes del estado de Oaxaca*, «Secuencias», n. 30, 1994, pp. 57-93; V.R. Martínez Vázquez, *Historia de la educación en Oaxaca. 1825/1940*, Oaxaca, UABJO, 1994; Id., *Juárez y la Universidad de Oaxaca*, México, UABJO, Senado de la República, 2006; F.J. Ruiz Cervantes, *El Instituto de Ciencias y Artes y la instrucción elemental en el estado de Oaxaca (1826-1891)*, «Huaxyácac», n. 8, 1996, pp. 15-17. Id., *La educación oaxaqueña en sus leyes*, Oaxaca, IEPO, 2001; J. Sánchez Pereyra, *Cassiano Conzatti, un hombre entre dos pasiones*, Oaxaca, Ex-Alumnos de la Normal Urbana de Oaxaca, Colegio de Investigadores en Educación de Oaxaca S.C., 2001; D. Traffano, «...y el gobierno mide en toda su magnitud la importancia de la instrucción pública...». *Retomando el sistema educativo de Oaxaca en el siglo XIX*, «Boletín de los Archivos y Bibliotecas de Oaxaca», n. 25, 2002, pp. 39-44.

⁸ Z.D. Jiménez Castro, *La educación "superior" pública de las mujeres en la ciudad de Oaxaca; 1866-1896*, Tesis de licenciatura en Ciencias de la Educación, Instituto de Ciencias de la Educación, UABJO, Oaxaca, 2008; E. López López, *La educación privada en la ciudad de Oaxaca; de la República restaurada a la Revolución*, Tesis de licenciatura en Ciencias de la Educación, Instituto de Ciencias de la Educación, 2010; C. Sánchez Silva, *Educando al ciudadano: los catecismos políticos oaxaqueños del siglo XIX*, Oaxaca, UABJO, 2008; D. Traffano, *Educación, civismo y catecismos políticos: Oaxaca, segunda mitad del siglo XIX*, «Revista Mexicana de Investigación Educativa», n. 34, 2007, pp. 1043-1063.

⁹ S. García Jiménez, *El ayuntamiento oaxaqueño y la consolidación del sistema educativo, 1857-1893*, Tesis de licenciatura en Ciencias de la Educación, Instituto de Ciencias de la Educación, UABJO, Oaxaca, 2008; F.J. Ruiz Cervantes, D. Traffano, «*Porque solo la ilustración puede desterrar de esos pueblos los vicios y la inmoralidad que los dominan*». *Indígenas y educación en Oaxaca (1823-1867)*, «Revista de História», Departamento de História da Universidade de

Una historia social de la educación cobija esta propuesta que, entrelazada con los acontecimientos que marcaron la historia política de la entidad, pretende esbozar los contornos del indio imaginado por las elites decimonónicas y rastrear cómo su afán por construir una sociedad ‘civilizada’ y homogénea las llevó a volcar todas las esperanzas en la educación. El trabajo relativo a estos procesos enmarcados en la diacronía propia de la historia de la educación primaria, alberga la esperanza de contribuir a la comprensión del siglo XIX así como a la explicación de orígenes, relaciones y situaciones que caracterizan la complejidad de las relaciones políticas e interétnicas de nuestros días.

1. *Estado, instrucción pública e indios*

Como los demás estados de la recién creada República Federal, una vez concluida la revolución de independencia, también Oaxaca emprendió la compleja labor de componer un marco legislativo acorde a su nueva situación política, de establecer un aparato de gobierno y de administración pública que sustituyese (o reconvirtiese) a las estructuras del antiguo régimen y de construir un nuevo pacto social con una ciudadanía multiétnica, pobre y esparcida sobre un territorio de muy difícil tránsito.

En 1825, la *Primera Constitución del Estado Libre y Soberano de Oajaca* establecía quiénes serían considerados ciudadanos y dictaba las condiciones sociales y territoriales necesarias para adquirir tal estatus¹⁰. Una de ellas insistía en que, para ejercer los derechos políticos, a partir del año de mil ochocientos cuarenta (los ciudadanos) deberían saber leer y escribir. Además, en tres artículos del capítulo XXVII, se decretaba que en todos los pueblos de la entidad se fundarían escuelas de primeras letras en donde se enseñaría a los niños a leer, escribir y contar el catecismo de la religión católica y el político; y se crearían establecimientos para la enseñanza pública de las Ciencias Naturales, Políticas y Eclesiástica, Bellas Letras y Artes útiles al Estado. A los ayuntamientos y repúblicas de indios correspondería el establecimiento, la dirección y el financiamiento de una escuela de primeras letras.

São Paulo, n. 154, 2006, pp. 191-220; S. Sigüenza Orozco, *Héroes y escuelas. La educación en la Sierra Norte de Oaxaca (1927-1972)*, Oaxaca, INAH, IEEPO, 2007; D. Traffano, *De la educación en Oaxaca a finales del siglo XIX*, «Archivo General de la Nación, Boletín», n. 11, 2006, pp. 96-105; D. Traffano, “La creación y la vigilancia de las escuelas municipales continuará a cargo de las autoridades [...]”. Ciudadanía, escuela y ayuntamientos. Oaxaca, siglo XIX, in Ead., a cura di A. Escobar Ohmstede, *Los pueblos indios en los tiempos de Benito Juárez*, UAM, UABJO, México, 2007, pp. 69-90.

¹⁰ Traffano, “La creación y la vigilancia de las escuelas municipales continuará a cargo de las autoridades [...]”. Ciudadanía, escuela y ayuntamientos. Oaxaca, siglo XIX, cit. pp. 77-78.

Estas disposiciones, que daban fundamentos a «el principio de la ilustración suspirada por las instituciones liberales»¹¹, presuponían la edificación de un aparato estatal de educación pública. El evento inicial en este sentido fue la publicación, en el verano del mismo año, de la primera Ley de Instrucción Pública de la entidad. Como señala Ruiz Cervantes, se trató de una reglamentación breve, de apenas ocho artículos que alentaban la apertura de nuevos centros educativos; se determinaba que todo oaxaqueño que se creyera capaz de enseñar alguna «ciencia política, natural o eclesiástica, noble arte o idiomas» era libre de hacerlo y de escoger el métodos de estudio y los textos de apoyo. El costo de la instrucción sería sostenido por los discípulos, aunque se agregaba que sería un mérito público reconocido el número de alumnos a los que se les enseñaría¹².

Para finales de los veintes, el gobierno anunciaba que el

pronto establecimiento de las escuelas de primeras letras en todos aquellos pueblos del estado que desgraciadamente no las tenían, era en su concepto, un asunto de tanta importancia y de una necesidad tan urgente, que se debía de verificar a cualesquiera costa y sacrificio¹³.

Sin embargo, si se exceptuaban unos pocos pueblos que tenían escuelas dotadas con fondos de ciudadanos particulares y las escuelas de Jamiltepec y Ocotlán sostenidas por sus respectivos ayuntamientos; en general, el ramo estaba en un «pie bastante lastimoso»¹⁴. Esto se debía a la escasez de fondos para la apertura y la ‘duración’ de las escuelas, además de dotaciones insuficientes para los preceptores, quienes, «libres del hambre y de la necesidad atormentadora, pudieran dedicarse con sosiego al cumplimiento de su oficio y promover los adelantos» de la numerosa juventud del estado¹⁵.

Parte de la responsabilidad de tan lastimosa situación, era atribuida al

torpe descuido de los indígenas, que desconociendo las ventajas que deben venir a sus familias de estos principios fundamentales de educación civil y religiosa, olvidaban este punto delicado de un interés general, por la mezquina utilidad que les resultaba de aplicar á sus hijos desde tiernos a los trabajos domésticos ó á las fatigas de los campos¹⁶.

Si bien para 1823 un anónimo autor había sostenido públicamente que la ilustración, en particular la de los hijos de los indios, habría traído como consecuencia ‘el bien de todos’, al concluir la década, los indígenas ya cargaban con el estigma de la ignorancia y la incivilización; además se decía que, sustrayendo a sus hijos a la ilustración, con egoísmo y mezquindad, obstaculizaban el bien común.

¹¹ *Memoria administrativa*, 1827, p. 21.

¹² Ruiz Cervantes, *La educación oaxaqueña en sus leyes*, cit., p. 5.

¹³ *Memoria Administrativa*, 1827, p. 20.

¹⁴ *Memoria Administrativa*, 1829, p. 9.

¹⁵ *Memoria Administrativa*, 1827, p. 22.

¹⁶ *Ibid.*, p. 21.

En 1829, para hacer frente a las circunstancias, la tercera legislatura, declaraba su empeño en

criar fondos en todas las poblaciones para dotar suficientemente las escuelas, confiarlas a sujetos que por su filantropía, instrucción y virtudes merezcan dirigir a la juventud [...] y obligar de un modo eficaz a los padres á que se interesen, y celen la concurrencia de sus hijos [...]¹⁷.

En los treinta el gobierno declaraba que un estado libre, soberano e independiente [...] necesitaba «de ciudadanos de ilustración, conocimiento y virtudes y por consiguiente que una general instrucción, formase esa porción de hombres útiles que hiciesen el bien de la comunidad»¹⁸. Sin embargo, al mismo tiempo, lamentaba que se hablara con entusiasmo en favor de la instrucción pero no se cooperaba a ella, y añadía: «no parece sino que se concibe el absurdo de que pueda haber sabios y virtuosos, sin que sepan leer, escribir y cultivar las ciencias»¹⁹.

Para 1832, de las 921 poblaciones del estado (sin considerar la capital) solo 395 contaban con una escuela de enseñanza primaria; tres sostenían a sus maestros con recursos de fundaciones piadosas, en Zochila intervenía el gobernador del departamento mientras que las demás se mantenían gracias a las aportaciones de los respectivos habitantes. Para la dotación y el funcionamiento de una escuela en todas las comunidades restantes, el gobernador presentaba dos propuestas. La primera contemplaba la elaboración de una ley que obligase a todo aquel pueblo que tuviese *bienes de comunidad* o *proprios y arbitrios* a invertir una parte en ese objeto, «y con dotaciones proporcionadas, para que sean regulares los preceptores»; para algunos más pobres se contemplaba un apoyo mientras que se debía de forzar a otros a ser «más trabajadores y laboriosos» para soportar ese severo gravamen que, en realidad, les debía ser «tan poco honeroso» en cuanto constituía una inversión «en su mismo provecho»²⁰. La segunda propuesta retomaba el decreto que en 1824 había creado la escuela lancasteriana²¹. Éste disponía que desde cada partido se remitieran dos jóvenes mayores de 20 años que viniesen a instruirse, para después servir de maestros en sus respectivas cabeceras y se generalizase la enseñanza mutua²².

Mientras refrendaba su preocupación por la ausencia de escuelas y de profesores preparados, el gobierno planteaba soluciones que nunca se aplicarían

¹⁷ *Memoria Administrativa*, 1829, p. 9.

¹⁸ *Memoria Administrativa*, 1831, p. 12.

¹⁹ *Memoria Administrativa*, 1832, p. 19.

²⁰ *Memoria Administrativa*, 1831, p. 13.

²¹ A finales de 1824, se adoptó el enfoque propuesto por la denominada enseñanza mutua o lancasteriana y se instaló la primera escuela de ese carácter bajo la dirección de Manuel Tomás Orozco quien había estado en la capital del país capacitándose en esa metodología. Sobre escuelas lancasterianas ver D. Tanck de Estrada, *Las escuelas lancasterianas en la ciudad de México: 1822-1842*, «Historia Mexicana», n. 88, 1973, pp. 494-513.

²² *Memoria Administrativa*, 1831, p. 13.

y apelaba a la buena voluntad de los «hombres de luces e influjo». Entre ellos los «curas párrocos» quienes, quizás estimulados en su «celo piadoso y patriótico» podrían con éxito remediar la deserción de los niños causada por «la repetida ignorancia de los indígenas» que ven con indiferencia la instrucción, y «con el más tenaz desafecto su consecución»²³.

En las áreas rurales, cuando todavía ni se concebía la separación entre los poderes eclesiástico y civil, el estado echaba mano de la infraestructura material y espiritual que la iglesia había construido en trescientos años de presencia entre la población. Esto era, utilizar a la parroquia como dimensión territorial de referencia para el recién creado sistema electoral²⁴ y confiar en la influencia del párroco para convencer a la población indígena de la importancia y la utilidad de la ilustración. Todavía para 1835, frente a las terribles epidemias y la crisis económica que habían obligado el cierre de las escuelas de muchos pueblos, las autoridades agradecían a los «Sres. Curas» su empeño para el aumento del número de escuelas en los departamentos de Huajuapán y Ejutla²⁵.

De mediados de los años treinta las fuentes nos remiten a finales de los cuarentas, cuando Benito Juárez fue designado gobernador.

Desde la revolución de independencia, México había sufrido los constantes conflictos de las elites por definir lo que consideraban el mejor rumbo para la nueva nación. Así del régimen monarquista de Agustín de Iturbide se pasó a la primera república federal y de ahí a la similar de corte centralista y nuevamente el régimen federal se impuso cuando arrancaba la guerra con Norteamérica.

Entre 1848 y 1852²⁶, en sus exposiciones al congreso, el mandatario renovó las preocupaciones por el adelanto de la ilustración de los pueblos, explicó el origen de sus deficiencias proponiendo soluciones y no construyó discursos entorno a la presencia y los vicios de los indios. Tampoco se ocupó de modificar la legislación relativa a la educación pública, dejando vigente la prístina ley de 1825.

Convencido que la instrucción aseguraba «el desarrollo y perfección de las facultades morales del hombre que sin disputa sirven de sólida base a la regeneración social»²⁷, desde su nombramiento Juárez apuntó a la miseria pública como la razón primaria de su rezago.

En 1848 declaraba:

El hombre que carece de lo preciso para alimentar a su familia, ve la instrucción de sus hijos como un bien muy remoto, ó como un obstáculo para conseguir el sustento diario. En vez de destinarlos a la escuela, se sirve de ellos para el cuidado de la casa o para alquilar su

²³ *Memoria Administrativa*, 1832, p. 20.

²⁴ Según la constitución política del estado de Oaxaca de 1825, las elecciones de diputados y senadores se debían de organizar “por medio de juntas parroquiales” (Artículos 37 y 38).

²⁵ *Memoria Administrativa*, 1835, pp. 9-10.

²⁶ Benito Juárez fue gobernador del estado de Oaxaca entre octubre de 1847 y julio de 1848, y entre diciembre de 1848 y agosto de 1852.

²⁷ *Memoria Administrativa*, 1852, p. 15.

débil trabajo personal, con que poder aliviar un tanto el peso de la miseria que lo agobia. Si ese hombre tuviera algunas comodidades, si su trabajo diario le produjera alguna utilidad, el cuidaría de que sus hijos se educasen y recibiesen una instrucción sólida en cualesquiera de los ramos del saber humano. El deseo de saber y de ilustrarse es innato en el corazón del hombre. Quítensele las trabas que la miseria y el despotismo le ponen y él se ilustrará naturalmente, aun cuando no se le dé una protección directa²⁸.

Según Juárez, la miseria pública hundía sus raíces en una situación económica ahorcada y estancada por el mal estado de las vías de comunicación y las dificultades en los transportes, dentro y fuera de la entidad. Para eso aclamaba que se abriesen puertos y caminos y que las mercancías circularan sin gravámenes ni trabas. El desarrollo del comercio permitirá así a los padres tener lo necesario para subsistir y «ellos mismos [...] dotarán escuelas, fundarán establecimientos literarios y los llenarán de sus hijos, cooperando de una manera eficaz al desarrollo de la inteligencia, sin la que los pueblos serán siempre miserables y desgraciados»²⁹.

La situación real provocaba la desertión de los niños, la escasez de fondos en los pueblos y la ausencia de preceptores instruidos y dedicados. A la vez, en este momento, el Estado solo podía contar con la fuerza y la buena voluntad de sus representantes locales y Juárez no dejó de reconocer la labor de «los señores gobernadores de los departamentos, los subprefectos y algunas corporaciones municipales» que hacían «cuanto estaba de su parte para fomentar la educación de la juventud»³⁰.

Con todo y los problemas que afligían a la instrucción pública, los esfuerzos del gobierno de Juárez dieron algunos resultados importantes: las escuelas primarias pasaron de 476 señaladas para 1848 a 699 reportadas para 1852 y sostenidas por los municipios. En su exposición al honorable Congreso sobre la situación de la instrucción pública el gobernador comentaba:

Pasado el tiempo de transición y colocados los pueblos en su estado normal, el gobierno ha podido dar a este ramo el ser que merece, y auxiliado en su empresa por las sabias disposiciones del cuerpo legislativo, por el empeño de los gobernadores y subprefectos, y por la docilidad y patriotismo de todos los ciudadanos, ha mejorado y aumentado notablemente el número de establecimientos para la educación primaria [...]. Es considerable ya el número de escuelas municipales que existen³¹.

Las fuentes señalan que esas escuelas eran sostenidas por los fondos comunales y, donde éstos no alcanzaban, se cubría el sueldo de los preceptores con suscripciones voluntarias de los padres de familia. En los pueblos asistidos

²⁸ *Memoria Administrativa*, 1848, p. 16.

²⁹ *Ibid.*, p. 17.

³⁰ *Memoria Administrativa*, 1849, p. 11; 1850, p. 10; 1852, p. 18.

³¹ *Memoria Administrativa*, 1852, p. 18.

por maestros indígenas originarios de la misma localidad, los niños sólo aprendían a leer, escribir y la doctrina cristiana³².

Tres temas específicos aparecieron como particularmente importantes para Juárez: la expansión de la educación primaria en zonas «que jamás habían recibido este precioso bien»³³, el empeño para la formación docente y la atención hacia la instrucción de la mujer. En cuanto al primer punto, el mandatario reportaba el caso de la sierra de Villa Alta donde según él «no conocían ni querían prestarse»³⁴ a la educación primaria. Ahora, gracias a «las providencias del gobierno»³⁵ y al apoyo de las autoridades locales, aquellos «honrados y laboriosos habitantes»³⁶ contaban con 105 establecimientos inspirando «una lisonjera esperanza para lo futuro»³⁷.

Villa Alta resultaba también ejemplar en el esfuerzo del gobierno para la formación de preceptores. Con cuatro escuelas normales, este departamento había acatado con éxito un decreto de 1850 que mandaba abrir en toda las cabeceras de partido escuelas para formar maestros. Éstos debían de ser jóvenes escogidos y sostenidos por sus respectivas comunidades quienes, una vez instruidos, regresarían a trabajar con los niños de aquellos lugares. Además de la cabecera y los partidos de Villa Alta, también en los partidos de Nochixtlán, Ocotlán, Yahutepec y Ejutla había normales en donde se verificaba anualmente un examen general, y se consignaba en las actas respectivas el estado de adelanto en que se encontraba la juventud³⁸.

Respecto a la educación femenina, Juárez sostenía que «formar a la mujer con todas las recomendaciones que exige su necesaria y elevada misión, es (era) formar el gérmen fecundo de regeneración y mejora social»³⁹. Las niñas estudiaban con los varones, con ellos aprendían a leer y los principios de la moral cristiana, «quedando el resto de su educación e instrucción al cuidado paternal». Separar los géneros y poder ampliar un poco la instrucción de las niñas había estimulado el empeño de las autoridades para abrir escuelas para «el seco débil»⁴⁰ en cuantos pueblos posibles, así que el estado, en 1852, contaba con 19 amigas⁴¹, siete en la capital y 12 en otras tantas poblaciones.

Acontecimientos nacionales y locales significativos dificultaron a esta fase de la administración de Juárez. El mandatario recibió un estado económicamente debilitado por su contribución «para sostener la guerra defensiva en que estaba

³² *Ibid.*, p. 34.

³³ *Ibid.*, p. 18.

³⁴ *Ibid.*

³⁵ *Ibid.*

³⁶ *Ibid.*

³⁷ *Ibid.*, p. 19.

³⁸ *Ibid.*, p. 18.

³⁹ *Ibid.*, p. 19.

⁴⁰ *Ibid.*

⁴¹ Con «Amigas» o «Amigas de niñas» se designaban las escuelas de primeras letras destinadas al sexo femenino.

empeñada la nación en contra de los Estados Unidos de Norte-América»⁴² y tuvo que hacer frente a importantes levantamientos populares, sobre todo en la zona del Istmo. Las ‘rebeliones indígenas’ que incendiaron Juchitán y Tehuantepec tuvieron eco también en las notas sobre educación pública. Convencido de que «solo la ilustración puede desterrar de esos pueblos los vicios y la inmoralidad que los dominan y que los precipitan a cometer los desórdenes que el gobierno se ha visto en la necesidad de reprimir con las fuerzas de las armas»⁴³, el mandatario exhortó la fundación de una escuela regular a cargo del erario en Juchitán, y la apertura de un colegio en Tehuantepec que, para 1852, se costeara gracias a una contribución del gobierno y al comercio de la sal local.

Pese a su evidente preocupación por las sombrías condiciones económicas y sociales de la población rural de la entidad, en ningún momento Juárez recurre a la ‘retórica del indio’. En las aseveraciones sobre la importancia de la educación para el progreso de las naciones, en los reportes sobre el estado de la educación pública o en las propuestas para su adelanto, no hay un ‘otro’ específicamente indígena a quién identificar con la ignorancia y los vicios, o responsabilizar de los males del estado. La miseria pública no agravia al indio sino al hombre «que carece de lo preciso para alimentar a su familia», y no los indígenas sino los oaxaqueños, todos por igual, «se dedican a la agricultura [...] para buscar los medios de subsistencia». Finalmente, para Juárez será gracias a «la docilidad y el patriotismo» de una población de ciudadanos en formación – y no de brutos incivilizados – que la educación primaria tendrá mejoras y expansión.

En los años que siguieron, Oaxaca quedó en manos de un militar y sufrió, como toda la nación, de las luchas entre liberales y conservadores. Fueron también los años de la proclamación de las constituciones nacional y local de 1857 y, cuando la primera señalaba que la enseñanza era ‘libre’, la segunda carecía de referencias explícitas al tema. Si un par de años más tarde, los liberales desde Veracruz anunciaban que el Gobierno procuraría el incremento de escuelas primarias gratuitas, las que serían dirigidas por personas de instrucción y con la moralidad requerida para desempeñar el cargo de preceptor; en Oaxaca fue necesario esperar el triunfo de los «borlados» (liberales moderados) para que se diera a conocer, en 1860, una nueva ley de instrucción pública⁴⁴.

Titulada *Ley Orgánica de la Instrucción Pública y del Instituto del Estado*, esta nueva reglamentación era más extensa y detallada que la de 1825 y abarcaba tanto a la enseñanza elemental que se impartía en las escuelas municipales y en las normales sobrevivientes, como a la superior y facultativa, que se brindaba en el Instituto de Ciencias y Artes del Estado y en los demás colegios establecidos en la entidad⁴⁵.

⁴² *Memoria Administrativa*, 1849, p. 14.

⁴³ *Memoria Administrativa*, 1850, p. 10.

⁴⁴ Ruiz Cervantes, *La educación oaxaqueña en sus leyes*, cit., pp. 21-25.

⁴⁵ *Ibid.*, p. 21.

Desde ahora el ramo educativo quedaban a cargo de la Dirección de Instrucción Pública del Estado, ente integrado por el Director del Instituto del Estado y sus catedráticos (art. 5º). Entre las asignaciones de la nueva Dirección estaban las de «vigilar sobre los establecimientos públicos, cuidando del fomento y exactitud de la enseñanza», «promover cuanto conduzca al progreso de la instrucción pública», «fijar los métodos de enseñanza, uniformarla y [...] presentar anualmente el Gobierno una memoria sobre el estado de la instrucción pública y medios de que adelante»⁴⁶.

En relación a la instrucción primaria se establecía que las escuelas municipales de primeras letras, su creación y vigilancia quedaba, como establecido en la Ley orgánica para el gobierno del estado de 1857, bajo la responsabilidad de los Ayuntamientos⁴⁷; pero la Dirección cuidaría que se uniformara la enseñanza además de imprimir y hacer circular los libros elementales. Para ese fin se instituyó una cátedra de tipografía y se dotó de un imprenta al Instituto de Ciencias y Artes del Estado⁴⁸.

En la Memoria Administrativa de 1861, el gobernador Ramón Cajiga en su relación sobre el ramo de Instrucción Pública volvía a proponer los temas centrales del discurso de las elites liberales: la importancia de la educación, las responsabilidades de su rezago que en buena medida se debía a ‘la condición de los pueblos’ y las iniciativas del gobierno liberal.

Es así que, para el gobernador, donde había ciencia e ilustración cesaba la violencia entre hermanos, el Estado se elevaba y adquirían vigor la seguridad, la tranquilidad y la dicha pública. En donde había ciencia e ilustración todos comprendían sus deberes y los cumplían; todos conocían sus derechos y reclamaban su violación; todos, trabajando para sí, trabajaban en provecho de la comunidad⁴⁹.

Firme en estas convicciones el mandatario aseguraba que el gobierno se había empeñado en «abrir escuelas gratuitas, inaugurar colegios, llamar a los jóvenes, [...] hacer tangibles los fecundos bienes que producía la ilustración»⁵⁰. Pero en la entidad se hablaban 17 idiomas diversos «que ciertamente eran una de las rémoras mas incontrastable que se habían opuesto al pleno desarrollo de la instrucción pública, y por consecuencia de la democracia, que era imposible plantear en un pueblo sin educación»⁵¹.

⁴⁶ Ley Orgánica de la Instrucción Pública y del Instituto del Estado, art. 6º 1ª, 2ª, 5ª, 10ª, *ibid.*, p. 28.

⁴⁷ Traffano, “La creación y la vigilancia de las escuelas municipales continuará a cargo de las autoridades [...]”. *Ciudadanía, escuela y ayuntamientos. Oaxaca, siglo XIX*, cit., pp. 82-83.

⁴⁸ Ruiz Cervantes, *La educación oaxaqueña en sus leyes*, cit., pp. 23, 27.

⁴⁹ *Memoria Administrativa*, 1861, p. 45.

⁵⁰ *Ibid.*, p. 47.

⁵¹ *Ibid.*, p. 49.

Así que, apuntaba el gobernador, para que los pobladores

se eduquen y comprendan nuestro lenguaje, no se han omitido sacrificios [...] se les han enviado libros elementales que los ilustren y nombrado preceptores que los enseñen a leer, se les escigen contestaciones escritas en castellano, se les prohíbe la vida nómada y casi salvaje que llevan, se les obliga a vivir en las poblaciones para ponerlos en contacto con los hombres que piensan y que hablan, se les predica sin cesar la urgente necesidad que hay de que hablen español⁵².

Sin embargo, el esfuerzo había caído como semilla en tierra infecunda porque «los habitantes del Estado, rudos y ariscos en una parte considerable, huían de la luz, temían a los hombres de razón». Además

Llenos de preocupaciones, apegados a sus recursos y a sus malas costumbres, rechazaban indignados la acción del poder, se burlaban de sus prescripciones, no aprendían lo que se les enseñaba, no concurrían a las escuelas que se abrían; y cuando uno los interrogaba, cuando compelían, cuando la autoridad urgía para que se olvidasen el pasado y aceptasen francos y sinceros el presente que un gobierno libre les ofrecía, ó comparecían encerrados en un mudismo tenaz, ó huían desprovistos á los montes para vivir como fieras⁵³.

El gobernador, con resignación, atribuía la hostilidad de estos ariscos habitantes también a su dispersión en más de 1500 pueblos, ranchos y haciendas; a las largas distancias que los separaban, a los caminos escabrosos, a medio siglo de guerras civiles y, sobretudo, a una miseria endémica⁵⁴. Por ella, los padres de familia que no tenían con qué alimentar y cubrir a sus hijos

no consentirán [...] en privarse del pequeño trabajo de aquellos para que se eduquen e ilustren; los frutos de estos sacrificios son tardíos, el hambre no admite espera, primero es vivir que ilustrarse, es más urgente conservarse que asistir a las escuelas y oír las lecciones del pedagogo⁵⁵.

Con dicha para la nación, los legisladores liberales comprendieron esta realidad. De allí que en consideración de las libertades individuales otorgadas por la constitución de '57: «se declarara que todo ciudadano debía ser propietario, que se bendijeran los esfuerzos del productor, que se estableciera la igualdad ante la ley, que se extinguieran los monopolios y los privilegios»⁵⁶.

Sin embargo, «no se hizo rico el pueblo, y si es cierto que se abrió un ancho campo a la producción, y que las subsistencias deberán aumentar, esto no será momentáneo ni fructificará con la violencia que la sociedad reclama»⁵⁷.

⁵² *Ibid.*

⁵³ *Ibid.*

⁵⁴ *Ibid.*, p. 46.

⁵⁵ *Ibid.*

⁵⁶ *Ibid.*, p. 47.

⁵⁷ *Ibid.*

Por lo pronto, era importante remediar la ausencia de escuelas de instrucción primaria en la infinidad de pueblos pequeños y pobres, sin fondos municipales, ni medios para crearlos, que les permitiesen sostener el sueldo de un preceptor y comprar los útiles necesarios.

De allí una propuesta del gobierno: mandar que los pueblos se esforzasen para sostener sus escuelas

y mientras, que los fondos de un municipio rico, se reúnan a los de otros pobres, formando una masa común de donde se pague un maestro cuando menos para cada pueblo. De este modo desaparecerá en algún tanto la dificultad que se opone a la conveniente ilustración de la muchedumbre por la porción de pueblos pequeños⁵⁸.

Para 1861, en Oaxaca se declaraba la presencia de 414 escuelas municipales con 15,738 niños, de 13 amigas con 677 niñas y de 9 normales con 1,076 alumnos.

Con el gobernador Cajiga, después del paréntesis de Juárez, los indios habían vuelto a su posición de marginados y reacios a las acciones del gobierno orientadas al crecimiento y al bien común. Los idiomas, las costumbres y su carácter, una vez más, les impedían entender y beneficiarse de las nuevas disposiciones liberales y superar los obstáculos de la pobreza y el aislamiento geográfico. La escuela, única solución para el desarrollo de un gobierno democrático, precisaba de los fondos que garantizaban su existencia y de ser aceptada por los pobladores. Además, si bien ya se estaban imprimiendo los mismos libros de texto para toda la entidad, la instrucción primaria todavía carecía de una ley que asegurase su uniformidad y fijase las materias que se enseñaban. Para eso se deberá esperar hasta 1889, cuando la Secretaría del Gobierno Político expidió la tercera Ley de instrucción primaria.

En las décadas que separaron la Ley de 1860 de la de 1889, la nación fue invadida por los franceses; Maximiliano de Habsburgo, coronado imperador, acabó fusilado cuatro años más tarde. La Guerra de Intervención volvió a destrozarse el país, Juárez falleció y, tras dos levantamientos, Porfirio Díaz logró llegar y afianzarse en la presidencia de la República. En Oaxaca, donde la presencia de los franceses se había hecho evidente tanto en la capital como en los distritos, entre 1860 y 1889 se sucedieron 19 gobernadores entre quienes destacaron el mismo Porfirio Díaz y su sobrino Félix; la población total del estado pasó de 5 a 8 millones aproximadamente, el telégrafo y el ferrocarril empezaron a facilitar las comunicaciones y se introdujeron productos para una agricultura de exportación⁵⁹.

⁵⁸ *Ibid.*, p. 48.

⁵⁹ F.R. Chassen-López, *Oaxaca entre el liberalismo y la revolución. La perspectiva del sur (1867-1911)*, Oaxaca, UABJO-UAMI, 2010; M. Dalton, *Breve historia de Oaxaca*, México, CFE, El Colegio de México, 2004; L. Reina Aoyama, *Camino de luz y sombra. Historia indígena de Oaxaca en el siglo XIX*, México, CIESAS, CDI, 2004; M. De los Angeles Romero Frizzi, *Lecturas históricas del estado de Oaxaca*, Vol. III, Siglo XIX, Oaxaca, INAH, Gobierno del Estado de

En las pronunciaciones de los gobernadores siguieron apareciendo datos cuantitativos sobre la presencia de la escuela en el territorio estatal y, una y otra vez, se repitió la retórica sobre la importancia de la educación, las iniciativas para mejorar la situación de la instrucción primaria y las razones de su retraso inevitablemente relacionadas a ciertas características propias de la población.

En cuanto a los números, el monto de escuelas primarias y las matriculas fueron fluctuando sometidas a las revueltas, a las dificultades del erario y a la escasez de docentes. Las fuentes reportan para 1869, 288 establecimientos de niños y 29 de niñas, el mismo número de preceptores y profesoras y una matrícula de 20,412 infantes⁶⁰; para 1875, 348 escuelas atendían a 21,474 niños y 2,469 niñas⁶¹; en 1881 las escuelas habían bajado a 202 con 12,600 alumnos⁶² mientras que para 1887 habían recuperado presencia y 558 establecimientos registraban una matrícula de 25,910 niños y 4,352 niñas⁶³.

En su discurso, los mandatarios reiteradamente insistieron acerca del valor de la instrucción pública que ejercía una benéfica influencia sobre la vida social de los pueblos y sobre su porvenir y felicidad, además que contribuía a su progreso moral y material. Gracias a la ilustración de los individuos, las masas regenerarían su inteligencia y llegarían a comprender sus derechos; solamente instruido el hombre será digno del título de ciudadano y comprenderá el valor de su posición⁶⁴. Ya para finales de los setentas apareció en el discurso político la necesidad de difundir una instrucción pública que fuera también gratuita y obligatoria⁶⁵ y se repropuso la certeza de que la instrucción primaria era la única esperanza del Estado para ilustrar a las masas y crear en ellas el noble deseo de saber. En tales circunstancias, la escuela de primeras letras era el libro rudimentario de la democracia, «en que el hombre daría los primeros pasos por la senda del patriotismo y de la gloria» y era «también la brújula que guiaba la inteligencia por los ignotos mares de las altas ciencias con que las naciones modernas estaban llamadas a ofuscar el esplendor de las antiguas para marchar a la vanguardia de los progresos humanos»⁶⁶.

Para que tan importantes esperanzas puestas en la escuela primaria fueran a traducirse en realidad, los gobiernos insistieron en la generalización de la instrucción a través de la apertura de nuevos establecimientos para ambos sexos y el aumento del número de alumnos. También se preocuparon por cuidar que los planteles estuviesen bajo la dirección de preceptores de «conocida aptitud y moralidad» y dotados de un sueldo adecuado y constante; y finalmente, por

Oaxaca, 1990.

⁶⁰ *Memoria Administrativa*, 1869, cuadro n. 19.

⁶¹ *Memoria Administrativa*, 1875, cuadro n. 62.

⁶² *Memoria Administrativa*, 1881, cuadro n. 25.

⁶³ *Memoria Administrativa*, 1887.

⁶⁴ *Memorias Administrativas*, 1879, p. XLVIII.

⁶⁵ *Memoria Administrativa*, 1877, p. 21.

⁶⁶ *Memoria Administrativa*, 1881, p. 37.

asegurar a los ayuntamientos una enseñanza costeada por el erario y auxiliada con un suficiente número de libros de texto⁶⁷.

En tema de creación de fondos, para hacer frente a su constante carencia, en agosto de 1867, el gobernador Maldonado implementaba el impuesto de 6 ¼ centavos para los gastos de instrucción primaria. De acuerdo a lo estipulado, se trataba de un gravamen aplicable a todo varón de entre 16 y 60 años. En el presupuesto de ingresos y egresos de aquel año se lee que esa asignación no podía sustraerse de su objeto, «conforme al reglamento que dé la instrucción pública»; lo que significaba que era un tipo de contribución personal dirigida exclusivamente a solventar los gastos de instrucción primaria.

Sabemos que se formaron padrones de los habitantes de cada municipio, con la finalidad de cobrar la capitación y al mismo tiempo cobrar el impuesto mensual de los 6 ¼ centavos. Estos últimos fueron elaborados por los presidentes municipales y mostraban los nombres de los contribuyentes; cada tres años eran actualizados con los datos de los nuevos vecinos. Las listas eran luego remitidas a los jueces del estado civil quienes a su vez las entregaban a la tesorería general. Finalmente eran enviadas a los jefes políticos para que hiciesen efectiva la contribución a través de los tesoreros distritales y municipales⁶⁸.

El impuesto fue derogado en diciembre de 1871 a causa del levantamiento de la Noria y reestablecido pocos meses después; quedó nuevamente suspendido en 1881 y fue reactivado al año siguiente.

La legislación sobre instrucción primaria también se fue ampliando y afinando; y las acciones emprendidas para difundir, sostener y garantizar una cierta calidad del servicio público exigieron una normatividad cada vez más precisa y detallada. En este sentido en los años que separaron la segunda ley de educación pública de 1860, de la tercera en 1889, el ejecutivo expidió tres reglamentos específicos para la instrucción primaria en 1867, 1872 y 1876. Con ellos, este nivel educativo se volvía definitivamente gratuito y obligatorio; y quedaba al cargo de la Dirección de Instrucción Pública, las juntas corresponsales, los jefes políticos, los presidentes y agentes municipales y bajo la protección y vigilancia del gobierno. En los tres documentos se van así construyendo y fijando la estructura general y los contenidos de la educación primaria; los perfiles y las tareas del personal docente; y las responsabilidades y funciones de los demás actores involucrados en el sistema⁶⁹. Las escuelas fueron divididas en dos clases. Las de primera, ubicadas en las cabeceras de

⁶⁷ En 1877 el gobernador informaba que los libros de texto distribuidos en el estado se imprimían en una Imprenta que se encontraba en Villa Juárez. *Memoria Administrativa*, 1877, p. 22.

⁶⁸ S. García Jiménez, *Las contribuciones directas y la capitación en Oaxaca: 1867-1881*, ensayo inédito, 2012.

⁶⁹ *Colección de Leyes, Decretos, Reglamento y disposiciones sobre Instrucción Pública*, Tomo I, Oaxaca, 1894, pp. 275-283, 408-413; *Colección de leyes, decretos y circulares del ramo de instrucción pública*, Tomo II, Oaxaca, 1902, pp. 7-20.

distrito, eran servidas por un profesor y varios ayudantes y las materias eran distribuidas a lo largo de cinco años. A su vez las escuelas de segunda clase que se encontraban en los demás pueblos, eran atendidas por un solo profesor y los niños completaban su instrucción en cuatro años. Los reglamentos fueron también normativizando métodos y materias de enseñanza, exámenes, horas de trabajo y libros de texto. En cuanto a los maestros, desde 1868 pudieron trabajar sólo «habiendo sido examinados y aprobados por la Dirección de Instrucción o Juntas Corresponsales» y tuvieron que respetar los lineamientos relativos a la aplicación de exámenes, transmisión de información a los órganos de control sobre resultados y concurrencia de niños y niñas, sueldos, licencias y conducta personal.

Finalmente, entre 1867 y 1876 se fueron perfilando las obligaciones de los padres de familia y las competencias de las instancias locales en cuanto a gobierno del ramo. Los primeros eran responsables de la asistencia y la permanencia de sus hijos en la escuela, mientras que a los presidentes y agentes municipales correspondía cobrar las multas aplicadas a los padres incumplidos. Para la escuela trabajarían también las Juntas de Instrucción Pública en la designación de maestros y las visitas a los establecimientos, los jefes políticos para la propuesta de candidatos a profesores, la transmisión de información entre la periferia y el centro, y la recolección y redistribución de fondos destinados al ramo.

A unos años de la publicación del último reglamento, el gobernador Luis Mier y Terán tomó una nueva iniciativa. En 1885 instituyó una Junta Auxiliar de Instrucción Pública a la que encargó la revisión del actual sistema educativo y la tarea de proponer los cambios necesarios para la implantación de un mejor sistema de enseñanza. Para su trabajo sobre la instrucción primaria, el gobernador señalaba que había procurado que la Junta tuviese diversas «obras sobre la materia mandadas a traer de la Capital de la República y Estados Unidos del Norte». Sus miembros, reunidos en la capital, estuvieron compartiendo experiencia y conocimientos, estudiando los mejores sistemas conocidos de enseñanza, «discutiéndolos y depurándolos de todo aquello [...] inconducente para alcanzar los buenos resultados prácticos» que necesitaba el ramo⁷⁰.

Ahora bien, pese a las reiteraciones sobre la importancia de la educación y a las iniciativas tomadas para su difusión, el rezago en la materia permanecía constante y los ejecutivos fueron aduciendo una y otra vez a viejos y conocidos argumentos para explicar y justificar las dificultades que nunca se habían podido superar.

⁷⁰ *Memoria Administrativa*, 1885, p. 69.

Volvieron así a aparecer la inmensa distancia entre los pueblos de la entidad, el clima malsano y peligroso, la crítica situación del tesoro público⁷¹ y «la escasez de profesores competentes especialmente en lugares remotos»⁷².

Sin embargo, las razones aducidas por los mandatarios y más contundentes que detenían «a la marcha de las clases civilizadas y a la de los Gobiernos»⁷³ residían en la ignorancia de las masas. Compuestas en su mayor parte de raza indígena, estas masas eran dominadas por los vicios y las pasiones. Desordenadas en sus hábitos, vivían sin afecto al honor y la virtud⁷⁴; sin amor al trabajo desobedecían a la ley y a la justicia; sin civilización vegetaban en el oscurantismo y el fanatismo⁷⁵.

Finalmente, como señaló en su informe el gobernador Mier y Terán, el mayor obstáculo al «progreso moral y material del pueblos» era la ignorancia de la raza indígena que vivía tan apegada a su ingrato idioma como a tradiciones y costumbres que ya no cuadraban con la época, que se sustraía a todo lo que significaba una innovación progresista y esterilizaba la mayor parte de los esfuerzos que los hombres públicos y los pensadores hacían para impulsarla por mejor senda⁷⁶.

El ejecutivo concluía su consideración afirmando que «ilustrar a esa raza era noble trabajo y su realización la más hermosa conquista que podían hacer los Gobiernos»⁷⁷.

Recogiendo el legado de su antecesor y sensible a los vientos de reforma escolar que soplaban a nivel nacional e internacional, en 1889 el nuevo gobernador, general Albino Zertuche, tomó iniciativas importantes para el desarrollo de la educación en la entidad.

Para ese año, la labor de Laubscher y Rebsamen en favor de la formación de docentes, así como la preocupación del Ministro de Justicia e Instrucción Pública, Joaquín Baranda, para unificar y beneficiarse de las propuestas sobre educación elemental, habían encontrado eco en la entidad. En ese contexto Zertuche informaba al Congreso que el estado participaría en el Primer Congreso Nacional Pedagógico convocado por el Presidente de la República para el primero de diciembre del mismo año; y que el pasado 22 de febrero había expedido una nueva Ley de Instrucción Primaria.

La representación de Oaxaca en el Congreso había recaído sobre el Dr. Valdivieso, en ese momento Director General de Instrucción Pública del estado. El Gobernador lo enviaba convencido de la trascendencia de la iniciativa de Baranda en la que los participantes se ocuparían de los métodos, los

⁷¹ *Memoria Administrativa*, 1879, p. XLVIII.

⁷² *Memoria Administrativa*, 1880, p. 16.

⁷³ *Memoria Administrativa*, 1885, p. 85.

⁷⁴ *Memoria Administrativa*, 1869, p. 39.

⁷⁵ *Memoria Administrativa*, 1872, p. 42.

⁷⁶ *Memoria Administrativa*, 1885, p. 65.

⁷⁷ *Ibid.*

procedimientos modernos y la uniformidad de los programas de estudio «a fin de alcanzar ventajas reales y de preparar convenientemente a la juventud para que sea útil a la sociedad y a la Patria»⁷⁸.

En cuanto a la nueva ley, el ejecutivo apuntaba que venía a reformar el reglamento de 1876 y contenía prescripciones que se referían

a las tres fases de la educación popular, a saber: la educación física, intelectual y moral, sin desatender por esto el inculcar a las jóvenes inteligencias las principales nociones de educación civil tan importantes en un país [...] en el que todos los ciudadanos son llamados a tomar parte más o menos activas en los negocios públicos⁷⁹.

En su informe el político consideró importante señalar que la ley se ocupaba también de los profesores quienes, desde ahora, «para obtener el título honroso de profesor de Instrucción Primaria» debían de comprobar debidamente haber «hecho estudios y práctica en la Escuela Normal de barones o, mientras se instalaba la de mujeres», que habían cursado cuando menos las materias correspondientes a la clase de profesorado que querían ejercer⁸⁰.

La ley de 1889 traía efectivamente muchas novedades y, si bien permaneció en vigor solo cuatro años, se asentó como pieza importante en la construcción del sistema de educación pública del estado liberal.

Sistematizando los adelantos en materia de educación primaria que se habían dado en las últimas décadas, en sus 103 artículos, más del doble de la anterior, retomó y completó las disposiciones que habían ido apareciendo en reglamentos y decretos. Como anticipado en los setentas, las escuelas de Oaxaca quedaban divididas en tres clases según su ubicación y los grados que ofrecían⁸¹ y, por primera vez en una ley de este nivel, quedaba establecido que la instrucción primaria sería gratuita y obligatoria, aunque esta última condición sólo aplicaba para las escuelas de tercera clase. La edad escolar se estableció de 7 a 15 años y los aspirantes deberían estar vacunados o haber padecido la viruela y no tener ninguna enfermedad contagiosa. Una vez admitidos se les practicaría un examen de colocación en el grado que les correspondía, cursarían una serie de materias establecidas por un nuevo plan de estudios que variaba de acuerdo con la categoría de la escuela para, finalmente, ser examinados públicamente cada tres meses. La ley establecía también premios y castigos, una escala de calificaciones y los detalles para los procesos de acreditación.

⁷⁸ *Memoria Administrativa*, 1889.

⁷⁹ *Ibid.*

⁸⁰ *Ibid.*

⁸¹ Las escuelas de 1° clase se ubicaron en la capital y en algunas cabeceras de distrito y ofrecieron cinco años de estudios; las de 2° clase se establecieron en las restantes cabeceras de distritos y ofrecieron cuatro años de estudios; finalmente las de 3° clase se abrieron en las demás poblaciones y sus estudiantes completaban el nivel de primaria en tres años de estudios. *Colección de leyes, decretos y circulares del ramo de instrucción pública*, Tomo II, cit., pp. 148-167.

En cuanto a los profesores, en el capítulo V quedaban reglamentados los procesos de selección, desempeño y permanencia en los puestos de trabajo; también quedaban normadas sus obligaciones y las penas en caso de ineficiencias o incumplimientos. A los profesores correspondía también llenar los formatos para registrar asistencias, faltas y calificaciones de los alumnos, así como asistir por turnos cada año a las Conferencias Pedagógicas que, presididas por el titular del Departamento de Instrucción Pública, se organizarían en la capital del Estado.

Una última novedad concernió a los edificios escolares. El artículo 67, que quizás podríamos interpretar como un renovado esfuerzo para involucrar directamente a la población en la lucha para difundir y arraigar la escuela sobre el territorio, obligó a los Ayuntamientos, bajo la supervisión de la Junta Directiva de Instrucción Primaria, a levantar un edificio que sirviera de habitación para el maestro y que tuviera las salas y los patios necesarios para la escuela⁸².

Esta tercera ley estatal de educación se publicó el 22 de febrero de 1889, para ese año existían 575 escuelas y una matrícula de 26,643 niños y 5,223 alumnas, número que, señalaba el gobernador, «no está en relación con el censo general de habitantes dependiendo de la gran resistencia que opone la raza indígena tan numerosa en nuestro Estado, a recibir la instrucción aun más elemental»⁸³.

Conclusiones

El siglo XIX en tierras hispanoamericanas se caracterizó por los procesos de independencias y la edificación de las naciones. Las elites criollas – que desempeñaron un papel fundamental en la construcción de sus respectivas repúblicas – supieron formular un nacionalismo moderno que impuso una relación inequívoca entre el estado-nación y el vínculo de ciudadanía; ésta a su vez ligó a todos los nacidos dentro de un determinado territorio delimitado por fronteras.

Con los debates de las Cortes de Cádiz y la publicación de la Constitución de 1812 se estableció un nuevo diseño de sociedad en donde los estamentos eran sustituidos por una sumatoria de individuos iguales por naturaleza y ante la ley.

Frente a una situación basada en los privilegios, los reformadores gaditanos defendieron la igualdad, al tiempo que frente al vasallo enarbolaron la bandera del ciudadano y sus derechos. El régimen que desde ese momento se irá construyendo correspondió a la lógica representativa, basada en la soberanía del pueblo ejercida por sus representantes. La Constitución de 1812 abrirá el paso a la instauración de la separación de los poderes, las libertades individuales, la

⁸² Ruiz Cervantes, *La educación oaxaqueña en sus leyes*, cit., pp. 53-93.

⁸³ *Memoria Administrativa*, 1889.

abolición de cuerpos electivos y estatutos privilegiados, la igualdad jurídica de las localidades y el carácter electivo de la mayor parte de los cargos públicos⁸⁴.

Una difusión firme y trascendente de tales principios, implicaba para las flamantes repúblicas, la transformación de una sociedad estamental y multiétnica de súbditos en una comunidad homogénea de ciudadanos. La extraordinaria pluralidad de las poblaciones americanas que se expresaba en una gran variedad fenotípica y cultural, agregó a ese proceso de transformación una dificultad especial.

En México, en donde los indígenas fueron pronto considerados un obstáculo para sus aspiraciones de nación moderna, prevaleció la teoría de la asimilación. Las razas autóctonas que carecían de sentimiento patrio; que la opresión colonial había convertido en seres taciturnos, reservados, desconfiados, mentirosos, pasivos, melancólicos, flemáticos, fríos, lentos, serviles, hipócritas y resignados; asimilándose al resto de la sociedad harían desaparecer sus defectos y conservarían sus virtudes. Para que, a toda costa, dejaran de ser indígenas era entonces necesario educarlos como a los blancos⁸⁵.

Desde las primeras décadas del siglo XIX, volverse ciudadano y elector informado de los derechos y los deberes propios, se inscribió en una categoría cultural que había gozado de gran prestigio en la Ilustración: se habló de ‘civilización’. Los indígenas debían de ser ‘civilizados’ y solo así dejarían de ser un escollo para que el país pudiera integrarse en el cauce del progreso universal⁸⁶. Ese grado de civilización sólo podría alcanzarse mediante la expansión de una educación uniforme y, para que fuera también funcional al objetivo de la homogenización, vinculada a una lengua única: el castellano.

En el estado de Oaxaca se reprodujeron y circularon todas las teorías y los prejuicios que, sobre indígenas, se habían gestado en territorio nacional. La ‘cuestión indígena’ fue identificada, discutida y enfrentada con la propuesta de una educación popular.

En este contexto, el estado liberal que surgió después de la Independencia persiguió la civilización de sus indios, legisló para formar a sus ciudadanos y se esforzó en justificar sus fracasos.

Es una historia que, vista más de cerca y a la luz de las palabras de los actores locales, se caracterizó por una serie de factores importantes.

Entre ellos, destacan el discurso sobre el indio y los componentes negativos de su imagen que, con regularidad, acompañaron las noticias oficiales sobre el estado de la educación primaria en la entidad. En esta estructura discursiva

⁸⁴ M. Quijada, C. Bernand, A. Scheneider, *Homogeneidad y nación con un estudio de caso: Argentina, siglos XIX y XX*, Madrid, CSIC, 2000, pp. 32, 33.

⁸⁵ E. Sanz Jara, *Los indios de la nación*, México, Iberoamericana-Vervuert, Bonillas Artigas, Universidad de Alcalá, 2011; B. Urías Horcasitas, *Historias secretas del racismo en México (1920-1950)*, México, Tusquets Editores, 2007.

⁸⁶ Quijada, Bernand, Scheneider, *Homogeneidad y nación con un estudio de caso: Argentina, siglos XIX y XX*, cit., p. 38.

la 'condición de la raza indígena' fue, al mismo tiempo, el estímulo para el adelanto de la escolarización y la razón de su retraso. Pero, mientras el gobierno pudo hacer alarde de un sistema educativo que, aunque con dificultades y tropezones, maduró desde el punto de vista legislativo y creció en términos de administración y difusión sobre el territorio; para las elites la situación del indígena nunca cambió y el indio nunca dejó de ser tal y de resistirse a la 'benéfica intervención del estado'.

Maria Montessori et la France. Genèse d'une histoire

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Maria Montessori and France. Genesis of a story

ABSTRACT: This article deals with the first twenty years (1911-1934) of the presence of the Montessori Method in France. The reconstruction is based on written evidences and on the main actors' experiences in the implementation of Maria Montessori's ideas. This historical outline allows to better recognise the reasons why Montessori's educative principles were not welcomed in France so warmly as in other European countries. Several initiatives took indeed place, but they remained insubstantial because they were almost always the result of efforts carried by single persons rather than institutions.

EET-TEE KEYWORDS: Maria Montessori; Teaching Method; Principles of Education; France; XX Century.

Prémisse

Paradoxale. C'est peut-être un des qualificatifs qui convient le mieux pour présenter l'histoire de l'évolution de la Méthode Montessori en France. En effet, il faudra qu'un médecin italien rappelle aux compatriotes d'Itard et Séguin les retombées positives de leurs découvertes pour l'éducation de tous les enfants. Comme nous le verrons c'est en 1912 que la presse française commence à écrire à propos de l'expérience de la *Casa dei Bambini* de Maria Montessori. Les premières personnes sont convaincues et une Maison des Enfants est fondée à Paris (1911). On pourrait croire que la guerre de 1914 paralysera l'essor de ce mouvement. Or il n'en sera rien. Au contraire, nous verrons l'impact des idées Montessori au cœur de la tourmente. Autre paradoxe: bien que Maria Montessori ait pris ses distances avec le mouvement de l'Éducation Nouvelle, ce sont les outils de ce courant qui feront la plus grande propagande aux idées de Maria Montessori. 1934 est l'année du premier et seul Cours International

Montessori en France, cours qui accueillera peu d'inscrits: notre parcours se terminera ici. Jusqu'à présent, cette reconstruction n'avait jamais été réalisée. Or, ce travail est nécessaire pour nous permettre de comprendre quelques-unes des raisons du fait qu'il y ait si peu d'écoles Montessori en France.

1. «*Une curieuse expérience d'enseignement sur les petits réfugiés*»

«L'enfant, d'ordinaire, a hâte de quitter l'école pour aller retrouver ses jouets. Ici c'est le contraire. La classe est pour lui une récréation perpétuelle. Il manie ces choses éclatantes avec des cris de joie et d'étonnement admiratif»¹. Ces paroles nous plongent au cœur de l'expérience fondamentale pour la divulgation de la méthode Montessori en France. Nous sommes en novembre 1916, en plein milieu de la tourmente de la première guerre mondiale, dans la région parisienne. Ce havre de paix et de développement harmonieux qui contraste tellement avec le contexte extérieur et qui laisse l'auteur stupéfait est un des lieux qui accueillent les petits réfugiés. Un long article de l'édition du 29 novembre 1916 du *Bulletin des réfugiés des départements du Nord* décrit le fonctionnement d'une de ces classes Montessori:

Quant aux marmots, [...] ils se livraient aux besognes les plus surprenantes: l'un arrosait une plante, l'autre s'amusait avec des bâtons bariolés, un troisième superposait des cubes, celui-là roulait des boules de terre glaise dans ses menottes malhabiles. – C'est sans doute la récréation, ils jouent? demandai-je. – Pas le moins du monde. Ils sont au contraire en plein travail. [...] Je résolus de connaître cet enseignement déconcertant, la méthode Montessori. [...] Il a plu à une bienfaitrice américaine [amie de Maria Montessori] d'un grand cœur et d'une haute culture, miss Cromwell, de la vulgariser. Elle assista aux premiers essais en Italie, suivit les effets, vérifia les résultats. Puis elle transplanta en France non seulement la théorie mais tous les objets, les 'accessoires'. Actuellement trois écoles fonctionnent à Fontenay-aux-Roses, à St-Sulpice et à Sèvres. Miss Cromwell a donné sa fortune à cette œuvre de propagande par l'exemple et par l'action. Elle assume toutes les dépenses: professeurs, matériel, habillement. [...] C'est elle qui a choisi et formé les maîtresses.

S'ensuit une longue description des principes généraux de la Méthode Montessori et des différents exercices auxquels sont occupés les enfants (vie pratique, sensoriels, géométrie, lettres rugueuses, numération, géographie, dessin). Comme pour rassurer le lecteur surpris par tant de nouveautés, on évoque pour conclure les résultats obtenus: «Vous vous demandez maintenant quels peuvent être les résultats de la méthode Montessori. Ils sont tous contenus dans un fait: les élèves de cinq à six ans qu'elle donne aux écoles de Paris sont

¹ A. Fage, *La méthode Montessori aux Refuges de Saint-Sulpice et de Fontenay-aux-Roses. Une curieuse expérience d'enseignement sur les petits réfugiés*, «Bulletin des réfugiés des départements du Nord», 29/11/1916, pp. 1-2. Source: <<http://www.gallica.bnf.fr>>.

pour la plupart tout de suite dans les premières places, et on a remarqué qu'ils comprennent généralement plus vite que leurs petits camarades». Mais l'action de Miss Cromwell ne se limite pas à la création et à la prise en charge de ces classes Montessori dans les refuges, elle a élaboré tout un système de promotion de la méthode Montessori et parmi le comité d'honneur qui parraine ce projet figure entre autre Henri Bergson.

En 1916, Larousse publie sa traduction des deux premiers ouvrages de Maria Montessori: *La méthode Dr. Maria Montessori: pédagogie scientifique. La maison des enfants*² et *L'éducation élémentaire* avec une préface écrite par le Directeur de l'Enseignement primaire, Mr Lapie. Elle met aussi sur pied un atelier de mutilés de guerre qui fabriquent du matériel Montessori qu'elle offre à 90 classes annexes des écoles normales dans toute la France³. En 1922, ce serait donc une centaine de classes de l'enseignement public à Paris ou dans les provinces environnantes qui utilisent le matériel Montessori reçu grâce à l'action de Miss Cromwell.

Mais si on lit ce qu'écrivit en 1934 une formatrice d'enseignantes, cette expérience n'a pas porté le fruit escompté à long terme:

En 1920 et 1921, je participai, à Fontenay-aux-Roses et à Paris, aux démonstrations de la méthode Montessori organisées par Miss Cromwell. Les institutrices d'écoles publiques et privées, les directrices d'Ecoles Normales, les inspecteurs, les inspectrices venaient voir travailler les enfants; beaucoup partaient enthousiasmées: laisser les enfants choisir leur travail, les laisser à ce travail aussi longtemps qu'ils en pouvaient tirer profit, les voir circuler avec aisance, sans que s'élevât la voix de la maîtresse, sans mise au coin, sans copie à refaire, sans punition intempestive, cela constituait une atmosphère dont les visiteurs appréciaient la douceur et la légèreté. Chaque institutrice voulait avoir sa classe Montessori. Un matériel lui était immédiatement envoyé et quelqu'un allait l'aider à l'installation: Mlle Arbenz s'acquitta magistralement de cette tâche; j'apportai une contribution aussi fervente, mais plus modeste. Au cours de plusieurs voyages, j'eus l'occasion de revoir quelques-unes de ces classes; j'y trouvai des tables bien alignées, des enfants immobiles derrière les tables; un crayon à la main, ils attendent le signal d'un exercice collectif. Les institutrices, elles, n'avaient pas changé: toujours intelligentes, zélées, enthousiastes. Que s'était-il passé? [...] Il ne suffit pas d'aborder une méthode nouvelle avec un cœur ardent, une imagination généreuse; il faut allumer la belle lanterne et s'assurer qu'on abordera désormais les enfants avec cet *esprit scientifique* et cette *honnêteté* de l'esprit⁴.

² M. Montessori, *La méthode Dr. Maria Montessori: pédagogie scientifique*, Vol. 1: *La maison des enfants*, Préface de P. Lapie, Traduction de M.R. Cromwell, Paris, Larousse, 1919. Une 2^e édition sortira en 1921.

³ R. Kramer, *Maria Montessori. A Biography*, Chicago, Da Capo Press, 1988, p. 246: «Miss Cromwell set up a workshop in the rue Marbœuf where disabled and blinded veterans manufactured the materials and furniture for schools in France, Belgium and Serbia».

⁴ R. Lebel, *La Formation des éducatrices*, «La Nouvelle Éducation», n. 127, juillet 1934, pp. 113-114. La source de la revue *La Nouvelle Éducation* est Source: Gallica (<<http://gallica.bnf.fr>>).

En 1935, Mme Guéritte, fervente montessorienne, signe un *Appel aux Réformateurs de notre Éducation nationale*⁵: «Nous trouvons également urgent de poser les questions suivantes: pourquoi les étudiants hollandais qui sortent des Universités connaissent-ils les découvertes montessoriennes et pourquoi nos Normaliens et nos Universitaires les ignorent-ils? Pourquoi tant d'institutrices intelligentes prêtes à appliquer la méthode Montessori dans les écoles publiques en sont-elles empêchées faute de matériel alors que parmi les séries de matériel Montessori offertes autrefois par Miss Cromwell à nos Écoles Normales, la plupart moisissent dans les placards sans servir à rien? Qui nous dira le nombre d'Écoles Normales où l'on sait s'en servir? Et enfin quand se décidera-t-on à enlever ce précieux matériel des Écoles Normales où l'on ne s'en sert pas pour le mettre entre les mains des institutrices prêtes à s'en servir?»⁶.

Si Miss Cromwell avait bien élaboré son projet dans ses différentes étapes (visite de classe Montessori – construction de matériel – envoi gratuit aux institutrices qui en font la demande – formation sur le terrain par une personne qualifiée), les résultats montrent que ce ne fut pas suffisant. La fragilité vient peut-être du fait que ce sont des classes et non des écoles qui pratiquent la méthode, ce qui risque d'entraîner plus rapidement le découragement de l'enseignante qui se retrouve seule face à des questions problématiques car c'est dans la mise en place au quotidien que surgissent les difficultés. Les Écoles Normales, lieux par excellence de formation, ont sans aucun doute leur part de responsabilité dans l'insuccès de cette magnifique initiative. Est-ce à imputer à une question de programme ou à une volonté politique d'attendre davantage de résultats avant de cautionner une méthode nouvelle?

2. Les Français redécouvrent Séguin grâce à un médecin italien

«Le docteur Gilbert Robin dit, au nom des médecins, l'aide que leur a apportée Mme Montessori après avoir rappelé aux Français l'existence de leur compatriote Séguin»⁷. En effet, Séguin déçu de l'accueil de ses recherches par ses collègues s'expatrie aux États-Unis où il dirigera un établissement pour les enfants anormaux pendant vingt ans. Grâce à Séguin, Maria Montessori comprend que le problème des enfants déficients mentaux est davantage d'ordre pédagogique que médical⁸.

⁵ T.J. Guéritte, *Appel aux Réformateurs de notre Éducation nationale*, «La Nouvelle Éducation», n. 133, mars 1935, p. 42.

⁶ «La Nouvelle Éducation», mars 1935, pp. 42-43.

⁷ «La Nouvelle Éducation», juin 1931, p. 110.

⁸ R. Kramer, *Maria Montessori. A biography*, Da Capo Press, p. 61: «In the light of her own observations, Seguin's work seemed to suggest the answer Montessori was looking for. "I felt that mental deficiency presented chiefly a pedagogical, rather than mainly a medical, problem"».

Le compte-rendu du service de Bicêtre en 1901, dirigé à cette époque par Bourneville, nous apprend que «l'an dernier Mlle Montessori a suivi assidûment notre service pendant plusieurs semaines»⁹. Elle se rendra aussi à Londres pour observer les pratiques découlant des principes préconisés par Séguin et cherchera laborieusement une copie de son second ouvrage *Idiocy and its Treatment by the Physiological Method* publié aux États-Unis et introuvable en Europe, qu'elle traduira en le recopiant à la main pour s'imprégner de sa pensée. Si elle s'inspire des considérations développées par Itard pour une observation idéale des enfants, elle adopte le matériel élaboré par Séguin en lui apportant des modifications quand les réactions observées sur les enfants lui montrent que c'est nécessaire¹⁰, les expérimentations des enfants avec le matériel élaboré par Séguin vont amener Maria Montessori à transformer le matériel thérapeutique en matériel auto-éducatif.

3. Ouverture de la première Maison des enfants

La première Maison des enfants est créée près du Champ de Mars¹¹ à Paris en octobre 1911 sous la supervision du «Comité pour l'étude de la Méthode scientifique d'éducation constitué de personnes amies de la Baronne Alice Franchetti¹² auxquelles celle-ci avait réussi à communiquer son enthousiasme pour le système Montessori»¹³. Il s'agit donc d'une initiative privée. Madame Pujol, membre de la Ligue pour l'Éducation morale de la jeunesse au sein de laquelle fut créé ce comité, explique qu'elle a travaillé dans les maisons des enfants à Rome sous la direction de la Doctoresse Montessori. À son retour à Paris fut ouverte «une école dans laquelle nous avons pu nous assurer qu'il est possible d'adapter le système au milieu et au tempérament français, sans en altérer aucunement le principe, qui est basé sur une connaissance profonde des lois qui régissent l'esprit humain et qui président au développement de tout

⁹ C. Philippi Van Reeseema, *Les précurseurs de Mme Montessori*, «Pour l'ère nouvelle», n. 21, juillet 1926, p. 83, note 1.

¹⁰ Voir à ce sujet le tableau comparatif élaboré par C. Philippi Van Reeseema, *Les précurseurs de Mme Montessori II*, *Pour l'ère nouvelle*, 22, pp. 119-123.

¹¹ Plus exactement au n. 5, avenue du Général-Tripier.

¹² D'origine américaine et de nature enthousiaste, elle se passionne pour les conditions de vie des paysans et installe une école primaire pour les enfants des paysans travaillant dans ses propriétés. Lorsqu'elle rencontre Montessori en 1908, son mari et elle se sentent immédiatement sur la même longueur d'onde et décide d'encourager et de soutenir le travail de Maria Montessori. Ils l'accueilleront régulièrement chez eux et organiseront le premier cours destiné à une centaine d'étudiants auxquels ils participeront assidûment.

¹³ Résumé du rapport présenté par Mme Pujol à la Conférence de Versailles, congrès des œuvres féminines françaises, le jeudi 13 juin in «La Femme», 7-8, juillet-août 1912, pp. 112-115. Source: Gallica (<<http://gallica.bnf.fr>>). Ce comité a donc été constitué aux alentours de décembre 1911 ou janvier 1912.

l'être. Nous avons assisté dans bien des cas à un véritable épanouissement des enfants»¹⁴. Cet article présente brièvement les conditions nécessaires pour établir une pédagogie scientifique et les effets de ces principes sur le comportement des enfants. La question épineuse de la formation des enseignants est longuement développée et prend la forme d'une liste des compétences et des traits de caractère qui sont ceux de l'enseignant montessorien. Il est intéressant aussi de souligner que certaines inspectrices générales des écoles maternelles se sont intéressées à leurs expériences "avec une bienveillance dont nous leur sommes reconnaissantes".

Ce rapport est résolument réaliste: on évoque la prudence à adopter avant de divulguer ces pratiques dans des écoles publiques à cause de la préparation indispensable des enseignants et on insiste sur le fait de ne pas aller trop vite car il s'agit d'un changement radical. Si de nombreux projets sont évoqués, l'auteur a aussi à l'esprit que comme pour toute œuvre philanthropique le futur n'est jamais totalement assuré. Ces considérations seront valables pour la plupart des initiatives montessoriennes en France. Ainsi, les nombreuses ouvertures de Maisons des Enfants iront de pair avec des fermetures plus ou moins rapides à de très rares exceptions près car elles sont le plus souvent le fait d'initiatives privées, liées à des personnes¹⁵ et non pas à des institutions. Cela sera donc synonymes de fragilité tout en étant de grande qualité.

Pour retracer l'évolution des idées montessoriennes en France, c'est principalement sur des écrits que nous nous baserons car les informations sur les créations d'écoles sont peu nombreuses.

Ce n'est pas seulement la presse pédagogique de l'époque qui propose des articles détaillés sur la *Casa dei Bambini* de Rome. Ainsi, la revue *Le musée social*¹⁶ s'intéresse à l'actualité sociale et à l'urbanisme, et consacre en juillet 1913 un article intitulé *Une œuvre sociale et éducatrice aux Bene Stabili de Rome*. L'auteur présente les objectifs poursuivis par les *Bene Stabili* et les actions déjà réalisées et s'intéresse plus particulièrement au quartier *San Lorenzo*. Y sont expliquées les décisions prises pour mieux organiser ce quartier et les innovations mises en place, comme un crescendo qui se termine par la description de la *Maison de l'enfance* à laquelle est consacrée une place prépondérante:

¹⁴ *Ibid.*, p. 113.

¹⁵ Les pionniers les plus célèbres en France sont Mme Bernheim et le Collège de la Jonchère à Rueil-Malmaison, Mme Luneau et la Clé des champs à Issoudun, Mme Cécile Riedel et l'Enfance heureuse à Vaucresson, Mme Niox-Chateau et la Joyeuse école à Boulogne, M. Lanternier à Limoges et à Rennes. cité par J. Bigeargeal dans son Introduction à l'édition française de P. Polk Lillard, *Pourquoi Montessori aujourd'hui?*, Paris, Desclée de Brouwer, 1984, p. 13. La revue *La Nouvelle Éducation* fera la publicité pour ces écoles, leur directrice étant pour la plupart des sociétaires.

¹⁶ M. Wolff, *Une œuvre sociale et éducatrice. Le Bene stabili de Rome*, «Le musée social. Annales», n. 7, juillet 1913, pp. 217-226. Source: Gallica (<<http://gallica.bnf.fr>>).

Mais j'ai gardé pour la fin ce qui me paraît être l'innovation la plus heureuse de ces maisons ouvrières, l'aménagement au sein même de l'agglomération populaire, dans un endroit clair, riant et avec un arrangement coquet de ces maisons de l'enfance: *Case dei Bambini*, pour l'organisation desquelles l'ingénieur Talamo s'est aidé en principe de la méthode et de l'action d'une éducatrice notoire même au-delà des frontières de l'Italie, Mme Montessori. [...] La maison des enfants doit être le centre actif, d'où émanera toute chaleur et toute lumière, pour animer et vivifier tout l'ensemble». Suit une description attentive des locaux: «La maison des enfants comprend une salle claire et gaie pourvue de petites tables que l'enfant prend et déplace à sa volonté, selon les idées de Mme Montessori, laquelle combat pour la liberté absolue laissée à l'enfant. Des objets de toute sorte sont mis à la disposition du petit pour éveiller sa curiosité et servir à ses expériences sensorielles. La Méthode Montessori est, comme celle du jardin d'enfants, fondée principalement sur l'éducation des sens; l'écriture et la lecture même, qui y sont enseignées d'une manière précoce, et d'ailleurs fort heureuse, sont elles aussi basées sur une curieuse adaptation du sens du toucher, et de l'activité musculaire». L'auteur continue à décrire l'organisation des différents locaux, le jardin et les compétences observées chez ces jeunes enfants qui semblent l'avoir stupéfié car il mentionne à plusieurs reprises «des exercices curieux».

4. *Ouvrages sur Montessori*

En 1914, un premier opuscule de 14 pages, *La Méthode Montessori*, est rédigé par Magdeleine Dufresne¹⁷, élève de la première heure de Maria Montessori¹⁸. Il faudra attendre 1915 pour qu'un livre présentant la Méthode Montessori soit publié en français, bien que dans ce cas il s'agisse d'une traduction.

La première personne qui publie un ouvrage consacré à la Méthode Montessori est Dorothy Canfield Fischer, américaine, auteur de nombreux essais et livres pour enfants dont le plus célèbre est *Understood Betsy*, l'histoire d'une petite orpheline éduquée avec des principes montessoriens. Elle se rend à Rome en 1911 pour voir de ses yeux ce nouveau système d'éducation pour petits enfants dont elle a entendu parler et se dit plutôt sceptique étant donné la réputation qu'avaient les écoles italiennes. Enthousiasmée par ses fréquentes visites à la *Casa dei Bambini*, elle publie en 1912 *A Montessori Mother*, fruit de ses observations et de ses discussions avec Maria Montessori. Ce livre ne sera pas traduit en français bien qu'il connaisse un immense succès. Il est immédiatement suivi d'un deuxième *The Montessori Manual: In which Dr. Montessori's Teachings and Educational Occupations Are Arranged in*

¹⁷ M. Dufresne, *L'Éducation Montessori*, «La Revue», 1^{er} avril 1914.

¹⁸ M. Dufresne, *Introduction*, en *L'éducation Montessori. Les principes qu'applique Mme Montessori dans les «Case dei bambini»*. *Causeries et notes d'une mère*, Paris, Fischbacher, 1915, p. XXI: «Il y a deux ans [en 1910] nous n'étions que quatre à travailler auprès d'elle [Maria Montessori], l'année dernière, un cours international amenait à Rome 86 élèves, et cette année un 2^o cours international s'organise pour le printemps».

*Practical Exercices or Lessons for the Mother or the Teacher*¹⁹. Le style est simple, la lecture facile, et le langage employé très éloigné de celui du milieu montessorien. Il est facile d'imaginer que cette simplicité est recherchée par l'auteur pour éviter les difficultés qu'elle-même a éprouvées dans sa lecture de Montessori à cause de l'italien difficile, des nombreux termes techniques, de faits médicaux et physiologiques ignorés du grand public. L'auteur propose des principes simples et concrets aux mères américaines qui souhaitent instaurer une éducation montessorienne à domicile. Mais ces livres présentent parfois des raccourcis dans la pensée de Maria Montessori, une des raisons qui expliquent qu'ils ne sont pas bien accueillis par celle-ci ni par son entourage. Dès sa sortie, son deuxième ouvrage est immédiatement discrédité car la simplification du matériel et de son utilisation risquerait de détourner de leurs objectifs les procédés minutieusement mis au point grâce aux longues observations de Maria Montessori et de ne pas produire les résultats escomptés, ce qui ne l'empêchera pas d'être fréquemment réédité. Ce livre est traduit en français et sortira en 1915 aux éditions Librairie Fischbacher sous le titre *L'éducation Montessori. Les principes qu'applique Mme Montessori dans les «Case dei bambini». Causeries et notes d'une mère*, ce livre sera réédité à onze reprises²⁰. L'édition française s'enrichit d'une longue introduction (22 pages divisées en 8 parties) rédigée par Magdeleine Dufesne qui fondera l'école de Lyndhurst, représentée sur toutes les gravures de l'édition française. Le livre est constitué de 16 chapitres dont la plupart présentent l'utilisation du matériel et des adaptations possibles ou nécessaires pour les familles américaines. Certains se concentrent sur des sujets plus généraux comme la discipline, l'obéissance ou l'éducation morale. Malgré le titre du livre, on a l'impression que les parents sont les destinataires principaux.

Le deuxième ouvrage est celui de L. De Peauw, directeur de l'enseignement normal en Belgique, *La Méthode Montessori telle qu'elle est appliquée dans les «Maisons des enfants», exposée et commentée à l'intention du public enseignant et des jeunes mères*²¹. Le livre sort pour la première fois en 1921 et en est à sa quatrième édition en 1929. Dans la préface de cette édition, l'auteur écrit que «ce modeste ouvrage eut successivement trois éditions, dont la dernière a été écoulee entièrement en France. [...] Il existe du présent travail, une édition néerlandaise et une édition espagnole, qui est surtout répandue dans les pays hispano-américains. Il vient en outre de paraître une édition bulgare».

¹⁹ D.C. Fischer, *The Montessori Manual: in wich Dr. Montessori's teachings and educational occupations are arranged in practical exercices or lessons for the mother or the teacher*, Chicago, Richardson, 1913.

²⁰ Il figurera dans la rubrique *Livres indispensables aux parents* présente dans chaque numéro de la revue «La Nouvelle Éducation».

²¹ L. De Paeuw, *La Méthode Montessori telle qu'elle est appliquée dans les «Maisons des enfants», exposée et commentée à l'intention du public enseignant et des jeunes mères*, 4^e éd., Bruxelles, Office de publicité-librairie belge, 1929.

Dès les premières lignes, le ton est donné :

Peu d'années après le commencement de ce siècle, la grande presse nous apporta la nouvelle qu'au ciel pédagogique de l'Italie venait d'apparaître une étoile de première grandeur, dont les chauds rayons provoqueraient avant peu un renouveau de nos systèmes éducatifs surannés. [...] La presse mondiale célébra en termes enthousiastes les efforts et les succès de Maria Montessori. La docteure trouva aussitôt une foule de disciples, ses fortes et saines théories furent propagées par des associations montessoriennes. [...] Ce succès persiste, il n'apparaît point comme un feu de paille, comme l'effet d'un emballement passager; tout fait prévoir, au contraire, que dans l'enseignement gardien ou maternel surtout, la nouvelle méthode se généralisera rapidement, parce que Mme Montessori l'a solidement construite sur les lois biologiques qui régissent la croissance de l'enfant en ce que celui-ci a de spécifiquement humain²².

Pour la rédaction de cet ouvrage, l'auteur s'appuie en grande partie sur le fruit de ses observations, très précises, de la Maison des enfants de Milan en 1916 et de Barcelone en 1919 où il rencontra aussi Maria Montessori et sur des ouvrages de Maria Montessori parus en anglais et indisponibles en français. Le treizième chapitre *L'horaire d'une maison des enfants* est constitué exclusivement de ses observations: «J'ai eu la bonne fortune de visiter cette dernière casa [celle de Milan] au cours de l'automne 1916. Il me plaît à déclarer qu'elle emporta aussitôt ma pleine et enthousiaste approbation. L'école était tenue de manière exemplaire par deux 'directrices' dont je ne puis que célébrer le dévouement et le savoir professionnel».

Le style de ce livre est clair, pédagogique, l'objectif de l'auteur étant vraiment de divulguer ses découvertes au plus grand nombre par la présentation des principes d'éducation montessoriens et du matériel utilisé avec beaucoup de détails utiles. Il manifeste souvent son accord à propos des pratiques préconisées: «nous sommes pleinement d'accord avec Mme Montessori lorsqu'elle vante ce matériel comme donnant une idée nette de la notion de *nombre*»²³ sans jamais rien remettre en question. Il ne prend ses distances qu'à une seule reprise lorsqu'elle parle de l'imagination chez les enfants:

Mme Montessori ne semble pas croire à l'imagination créatrice. Et pourtant elle existe. [...] Nous ne demandons pas mieux que de nous laisser conduire, de nous laisser instruire par Mme Montessori; mais nous ne lui permettons pas de nous conduire trop loin. Nous la suivrons volontiers dans le domaine où elle est maître en toutes armes, c'est-à-dire dans celui du développement intellectuel, basé sur l'observation sensorielle et intimement liée avec elle. Mais arrivés à la frontière du pays merveilleux de l'imagination enfantine, nous prenons congé d'elle. Celui qui veut comprendre les enfants doit se rendre dans leur pays à eux. Ce pays est très étendu [...] Il y a aussi de nombreuses habitations. La *casa dei bambini* n'en est qu'une. Toutefois Mme Montessori n'évoluerait-elle pas quelque peu sur ce terrain comme

²² *Ibid.*, pp. 6-7.

²³ *Ibid.*, p. 98.

elle semble l'avoir fait sur d'autres? Les contes ne sont désormais plus bannis de ses classes gardiennes, car, dans son *Own Handbook*, elle dit en parlant de l'organisation intérieure d'une Maison Des Enfants, que dans le parloir ou chambre de famille, l'institutrice régale parfois les enfants d'un beau conte²⁴.

Les auteurs de ces deux premiers ouvrages ont tous deux rencontré Maria Montessori et partagent sa vision d'ensemble. De plus, ils sont remontés à la source pour mener leurs observations et ont été conquis par ce qu'ils ont vu. Le ton est résolument positif et même incitatif comme en témoignent les dernières lignes de De Paeuw: «Qu'il me soit permis, avant de terminer, d'exprimer le vœu que la méthode Montessori obtienne bientôt droit de cité dans nos écoles gardiennes et que celles-ci se muent en autant de laboratoires, où un personnel attentif, bien stylé et joyeux s'adonne avec amour à la plus belle étude du monde: l'étude du développement de la tendre et captivante psyché enfantine!»²⁵.

Deux autres livres paraissent à la même époque, ils se présentent davantage comme une étude critique. Le premier est celui de E. Flayol, directrice d'école normale, *La méthode Montessori en action. Théorie-pratique-critique*²⁶. Cet ouvrage voit le jour grâce au matériel que Miss Cromwell envoya aux écoles normales, ce qui a suscité une belle expérience dont le récit débute le livre:

La classe enfantine de l'école annexe où est appliquée la méthode Montessori a été fréquemment visitée. D'autre part, des institutrices d'école maternelle ont manifesté leur désir de connaître et d'utiliser si possible les principes et les pratiques de la méthode Montessori. Moi-même, intéressée par les résultats de notre expérience, par les curieuses observations psychologiques qu'elle permettait, par tout ce qui me semblait, dans cette méthode, répondre aux actuelles aspirations de notre pédagogie et aussi aux instincts propres de notre âme française, j'ai souhaité dégager ce qu'il y avait en elle, pour nous Français et pour nos écoles françaises d'assimilable et d'excellent. De là le double aspect de ce livre qui ne vise qu'à faciliter l'emploi de la méthode à ceux qui veulent l'appliquer en utilisant deux ans d'expériences, et à exprimer les réflexions de ces expériences.

Le livre se compose de deux parties: dans la première l'auteur présente les principes et les exercices «sans les juger» pour aborder ensuite les apports nouveaux de la Méthode Montessori, son application dans les écoles maternelles françaises ainsi que les résultats obtenus et les dangers à éviter. Le style de la seconde partie est donc différent et commence d'emblée par une critique, réaliste et encore valide de nos jours chez certains, de l'univers Montessori: «Ce qui semble caractériser l'état d'esprit de la plupart des disciples de Mme Montessori c'est une sorte de sentiment quasi religieux devant les idées pédagogiques dont ils ont reçu par elle une sorte de révélation. L'esprit de prosélytisme, inséparable de ces croyances enthousiastes, anime d'une force indomptable ces ardents

²⁴ *Ibid.*, pp. 114-115.

²⁵ *Ibid.*, p. 127.

²⁶ E. Flayol, *La méthode Montessori en action. Théorie-pratique-critique*, Paris, Nathan, 1921.

propagateurs du nouvel évangile pédagogique»²⁷. Attitude bien différente de celle des Français qui ont montré moins d'enthousiasme car les écoles maternelles françaises sont, à son avis, déjà un peu montessoriennes dans l'âme grâce aux innovations introduites par Pauline Kergomard comme la liberté d'action laissée à l'enfant, la possibilité de manipuler et de jouer à sa guise, l'insistance sur l'hygiène et les soins corporels comme l'explique le chapitre *La méthode Montessori dans nos écoles maternelles*. Ainsi la seule différence que voit l'auteur entre les classes françaises et les montessoriennes c'est que dans les premières les exercices se font collectivement et que le matériel y est moins bien élaboré. Le fruit de ses observations permet cependant de penser qu'il y a davantage de différences, étant donné qu'elle s'extasie devant le bonheur qu'ont les enfants à apprendre, la continuité de leur effort, leur capacité à se concentrer, la transformation opérée chez certains enfants «barbares» et le fait que la vie de la classe soit constamment renouvelée. Elle attire cependant l'attention sur les qualités que doit posséder l'enseignante et sur le danger qu'il y a à considérer la classe Montessori comme un simple atelier d'exercices spéciaux, intellectuels ou moteurs.

Le quatrième ouvrage est celui de F. Garcin, *L'éducation des petits enfants par la méthode Montessorienne. Partie théorique – partie pratique*²⁸ qui sous de nombreux aspects est proche de celui de Flayol. Bien qu'il reconnaisse la force que donne l'esprit de précision mathématique et scientifique de Maria Montessori à sa méthode et le mérite de sa puissance éducatrice personnelle, il tient à replacer à leur juste place ses découvertes en reconnaissant ce qu'elle doit à ses prédécesseurs et à leurs travaux. Garcin s'attache aussi à calmer les envolées lyriques de Maria Montessori comme par exemple son attaque virulente contre le banc: «Notre matériel scolaire est un héritage d'erreurs pédagogiques, c'est entendu, corrigeons ces erreurs et rendons tout de même hommage à nos précurseurs. Ce besoin d'équité nous invite à rappeler que les créateurs du banc scolaire furent conduits par des mobiles où l'économie tint plus de place que la philosophie. Ils ne virent jamais le mal physiologique et encore moins le mal moral dont un banc peut se rendre coupable»²⁹. À ce propos, il est intéressant de souligner, comme le fait l'auteur, que Pauline Kergomard préconisait déjà l'utilisation de petites chaises au lieu des bancs³⁰: c'est donc à elle que l'on doit le mobilier actuellement en vigueur et non pas à Maria Montessori.

²⁷ *Ibid.*, p. 35.

²⁸ F. Garcin, *L'éducation des petits enfants par la méthode Montessorienne. Partie théorique – partie pratique*, Paris, Nathan, 1922.

²⁹ *Ibid.*, p. 10.

³⁰ «Mobilier de plusieurs tailles, de bois naturel ou de teintes claires, tables absolument planes indispensables pour les installations d'objets, de jouets et les travaux manuels, et très suffisantes aussi pour les premiers essais de dessin et d'écriture; chaises infiniment préférables aux bancs pour permettre les déplacements rapides et les groupements variés nécessaires à certaines occupations et à la mobilité enfantine», in Kergomard, Brès, *L'enfant de 2 à 6 ans*, cité par F. Garcin, *L'éducation des petits enfants par la méthode Montessorienne*, cit., p. 17.

Garcin insiste aussi sur le fait que Montessori ne craint pas la rigueur des conclusions auxquelles la conduit l'application de ses principes, comme par exemple à propos de l'abolition de toute récompense et il craint que l'idéal de Montessori ne soit trop élevé et donc difficile à atteindre pour beaucoup. Comme Flayol, il repère dans la méthode ce qui se fait déjà dans les écoles françaises: à propos des caractéristiques de la leçon préconisées par Montessori (individuelle, concise, simple, objective) il déclare que les trois dernières sont celles de toute bonne pédagogie. S'il approuve Montessori sur ce point, il insiste sur le fait que ce n'est pas l'apanage de la méthode Montessori. Mais ce qu'il semble ne pas comprendre c'est que ces caractéristiques sont difficilement applicables si l'on n'utilise pas le matériel Montessori. Il est réticent aux attaques de Montessori contre la leçon collective car il y voit d'énormes difficultés d'ordre pratique: «nous ne voyons pas la possibilité de faire de chaque classe un champ d'incessantes expériences, et de chaque maître un chef de laboratoire psychologique. Où prendrait-on le personnel nécessaire à l'exécution d'une pareille tâche qui demande un maître pour une dizaine d'élèves maximum? À quelle hauteur s'élèverait la pyramide budgétaire?»³¹. Devant de telles affirmations, il est naturel de se demander si Garcin a déjà vu de ses yeux fonctionner une classe Montessori qui comptait jusqu'à 40 ou 50 enfants avec à chaque fois un seul exemplaire de chaque matériel.

Dans la partie pratique de son livre, Garcin décrit minutieusement le matériel auquel il attribue une grande partie du succès obtenu par Montessori. Il considère ce matériel comme la matérialisation de sa pensée et étant donné qu'il n'est pas toujours d'accord avec elle, il estime de son devoir de le modifier, afin de réduire aussi l'aspect économique du matériel Montessori. L'auteur a élaboré son propre matériel en cartonnage en le simplifiant, en modifiant les mesures et la manière de le présenter, ce qui fait qu'on doit parler d'un matériel Garcin qui est commercialisé.

L'auteur soulève des questions intéressantes mais le ton employé ne rend pas toujours sa lecture très agréable.

5. *La Nouvelle Éducation*

La Nouvelle Éducation, société fondée en 1921 par R. Cousinet et Mme T. J. Guéritte, doit son inspiration à Maria Montessori, comme nous le révèlent les paroles de T. Guéritte, véritable pilier de l'association: c'est à elle «en vérité qu'est due la création de notre société; c'est la découverte de son livre les *Case dei Bambini*, en 1912, qui m'a donné la vision nette de l'éducation qu'il

³¹ *Ibid.*, pp. 46-47.

fallait aider à répandre dans le monde et, en particulier dans notre pays»³². Commençons d'emblée par souligner le fait que Maria Montessori sera l'invitée d'honneur des célébrations organisées à Paris du 31 mars au 4 avril 1931 et qui rassembleront plus de mille personnes à l'occasion du dixième anniversaire de la fondation de *La Nouvelle Éducation*. Elle prononcera une conférence *L'enfant nouveau* qui sera introduite en ces termes:

Depuis 20 ans, Mme Montessori a non seulement libéré des milliers d'enfants, mais elle a, en même temps, refait toute notre éducation. Nous ne saurons jamais lui en être trop reconnaissants. Remercions-la d'autant plus aujourd'hui d'être venue qu'elle a dû pour cela abandonner son cours de Rome. Dirai-je qu'à ce XVI^e cours international 40 % des étudiantes sont venues d'Allemagne; pas une de chez nous! Espérons que le prochain cours comptera quelques Françaises et que la libération des enfants fera désormais parmi nous des progrès considérables³³.

L'association se propose donc de réunir tous les «éducateurs décidés à favoriser en France l'activité personnelle des enfants, soit dans l'école soit dans la famille. Son but est d'aider ces éducateurs, de faire connaître et de répéter leurs expériences afin que les travaux de chacun puissent profiter à tous, et que se fasse plus vite la transformation nécessaire de nos méthodes d'éducation»³⁴.

L'outil principal est la revue mensuelle dont Mme T. J. Guéritte sera une des plumes les plus prolixes en se faisant le défenseur de la méthode Montessori, comme le laissent entendre ces lignes passionnées, une critique de l'ouvrage de H. Bouchet, *L'individualisation de l'enseignement*:

Cet auteur³⁵ qui comprend si bien l'un des principes fondamentaux de l'éducation pour laquelle nous luttons, et qui a réuni dans son ouvrage une masse de documents précieux, nous donne tous les espoirs jusqu'au moment, hélas! où nous nous heurtons, dans son livre, non pas à l'ignorance totale des méthodes nouvelles, mais à quelque chose de plus grave encore: à une présentation erronée de la plus importante d'entre elles. Et cela, encore une fois, à cause d'une documentation de seconde main, aussi fausse qu'insuffisante. Si nous n'étions pas sûrs depuis longtemps que la méthode Montessori accomplit une révolution bien plus profonde que toutes les autres, nous pourrions le deviner en voyant que c'est celle sur laquelle on fait le plus d'erreurs et qui suscite le plus d'hostilités³⁶.

La revue contribue à faire circuler les idées de Montessori, considérée comme la plus importante des méthodes, en présentant la traduction de

³² T. Guéritte, *Rapport de notre X^e assemblée*, «La Nouvelle Éducation», n. 46, juin 1931, pp. 101-102.

³³ *Ibid.*

³⁴ Présentation de l'association sur la première page de chaque numéro de la revue. L'association cessera de publier la revue en 1939.

³⁵ Il s'agit de H. Bouchet, *L'individualisation de l'enseignement*, Paris, Alcan, 1934.

³⁶ M. Guéritte, *Appel aux réformateurs de notre éducation nationale*, «La Nouvelle Éducation», n. 133, mars 1935, p. 81.

conférences *L'Enfant nouveau*³⁷, *La régénération spirituelle de l'Homme*³⁸ ou d'article paru dans des revues étrangères *Les Périodes sensibles*³⁹; des notes de cours d'étudiantes ayant participé à un cours à l'étranger *Les idées de Mme Montessori*⁴⁰, *L'enfant sans défaut*⁴¹, *Notes sur le Cours Montessori*⁴²; des articles écrits par ses fidèles collaborateurs comme Anna Maccheroni⁴³, Hélène Lubienska qui dans son article *L'éducation montessorienne d'un bébé*⁴⁴ partage les nombreuses suggestions de Maria Montessori, marraine du bébé en question ou R. Lubienski⁴⁵. Mais l'aspect pratique n'est pas en reste avec la place consacrée aux récits d'expériences comme *Expérience de travail géométrique*⁴⁶, *L'école heureuse*⁴⁷, *Application des principes montessoriens à l'enseignement secondaire*⁴⁸ dans lequel est présenté le matériel élaboré pour l'étude du latin⁴⁹, *Quelques résultats des écoles nouvelles*⁵⁰ ou *Pour les*

³⁷ Conférence prononcée à Paris pour le X^e anniversaire de la «La Nouvelle Éducation» (n. 96, juin 1931, pp. 102-110).

³⁸ Traduction de la conférence prononcée à Londres le 3 janvier et publiée dans la «La Nouvelle Éducation» (n. 123, mars 1934, pp. 33-38).

³⁹ Extrait et traduit de la revue Montessori, mai-juin 1932 publié dans «La Nouvelle Éducation», n. 111, janvier 1933, pp. 3-5.

⁴⁰ Mme Guéritte, *Cours de Londres durant l'été 1927*, «La Nouvelle Éducation», n. 59, novembre 1927, pp. 166-169.

⁴¹ Mme Busson, *Reproduction fidèle, mais très résumée, des paroles de la Dottoressa lors du XIX^e cours à Barcelone 1934*, «La Nouvelle Éducation», n. 125, mai 1934, pp. 71-77.

⁴² Une étudiante, *Cours de Nice*, «La Nouvelle Éducation», n. 129, novembre 1934, pp. 156-162.

⁴³ A. Maccheroni, *Les Mathématiques et la Méthode Montessori*, extrait de *The New Era*, janvier 1934 publié «La Nouvelle Éducation», n. 125, mai 1934, pp. 66-70.

⁴⁴ H. Lubienska, *L'éducation montessorienne d'un bébé*, «La Nouvelle Éducation», n. 137, juillet 1935, pp. 122-129.

⁴⁵ R. Lubienski, *Les caractères essentiels d'un lycée montessorien*, «La Nouvelle Éducation», n. 143, mars 1936, pp. 33-37.

⁴⁶ Mme Reynier, *Expérience de travail géométrique*, «La Nouvelle Éducation», n. 23, mars 1924, pp. 17-19. Elle aborde aussi le problème du manque de matériel et la possibilité de le faire construire par les élèves.

⁴⁷ Mme Leroux-Riedel, *L'enfance Heureuse de Vaucresson*, «La Nouvelle Éducation», n. 97, juillet 1931, pp. 138-140. Cet école reçut la visite de Montessori qui leur dit «Vous avez bien nommé votre maison!».

⁴⁸ Mme Lancelin, *Application des principes montessoriens à l'enseignement secondaire*, «La Nouvelle Éducation», n. 136, juin 1935, pp. 104-111: «Depuis trois ans à la Maison des Enfants de Sèvres, nous avons tenté pour la première fois en France d'appliquer la méthode Montessori à des enfants que leur âge ou leur développement intellectuel placerait dans le cycle secondaire des lycées».

⁴⁹ Certains enfants ont commencé le latin le 15 octobre. Le 20 décembre la majorité possédait à fond les 5 déclinaisons, les verbes Sum et Amo bien ancrés par une multitude d'exercices, un grand vocabulaire, et ils avaient déjà traduit quelques pages d'Épître. À la fin du 2^e trimestre, le rythme ne s'était pas ralenti, les plus vifs connaissaient tous les verbes actifs et passifs, les adjectifs et les pronoms; ils avaient commencé les adverbes et avaient fait quantité de petits thèmes et de petites versions.

⁵⁰ Y sont présentées les acquisitions d'un enfant de 5 ans dans une école Montessori, *Quelques résultats des écoles nouvelles*, «La Nouvelle Éducation», n. 172, décembre 1938, p. 75.

*parents*⁵¹. On trouve aussi la publicité et les contacts des écoles utilisant les méthodes nouvelles, et en particulier la Méthode Montessori en France. La revue propose aussi les informations nécessaires à propos des différents cours internationaux Montessori et leur compte-rendu comme celui de Londres en 1929 où parmi les 3000 participants on ne compte pas une seule française⁵². Lorsque le XXe Cours international Montessori est organisé à Nice du 16 juillet au 22 septembre 1934, la revue en fait une belle publicité si bien que sur les 70 participants on compte 35 françaises dont 21 sont membres de *La Nouvelle Éducation*:

Quand l'adulte opprime l'enfant, a dit Maria Montessori, il sème le trouble et la maladie dans l'humanité. Nous ne voyons que trop, aujourd'hui, la justesse de ses paroles, et nous savons que notre monde malade ne recouvrera la santé que lorsque l'adulte ne sera plus, par son ignorance le plus grand obstacle aux forces spirituelles de l'enfant. C'est pourquoi nous vous disons à tous, parents, jardinières, cheftaines, institutrices et professeurs: pour la première fois, le Cours Montessori va avoir lieu en France [...] il est plus que jamais nécessaire que beaucoup de parents et de professeurs d'enseignement secondaire aillent le suivre⁵³.

Le compte-rendu rédigé par deux participantes nous apprend que Montessori faisait des conférences presque chaque jour. Elle a exposé la technique de sa méthode, la psychologie de l'enfant et a défini le rôle de l'adulte et de la société à l'égard de cet enfant, porteur de la promesse d'un monde nouveau qui respectera le travail, ce besoin fondamental de l'homme. «Ce serait trop peu de dire qu'on y a beaucoup appris: on s'y est véritablement enrichi. On en est parti avec la conviction d'avoir touché du doigt une vérité, avec le ferme désir de la répandre». [...] Le Cours Montessori s'est terminé par un goûter où les étudiants avaient invité Mme Montessori et l'un d'eux a exprimé très simplement ce que tous éprouvaient: «Toutes nous avons l'amour des enfants et le désir de faire le mieux possible notre tâche auprès d'eux. Toutes nous avons cherché, mais c'est près de vous que nous avons trouvé la vérité, cette certitude qui permet d'agir sans l'arrière-pensée du doute». La Doctoresse répondit avec la simplicité de ceux qui ne peuvent mesurer tout ce qu'ils donnent: «J'ai senti entre nous un échange, j'ai beaucoup appris à votre contact, je vous en remercie»⁵⁴.

⁵¹ Mme Guéritte supplie les parents de suivre les conseils de Montessori en matière d'éducation: *Pour les parents*, «La Nouvelle Éducation», n. 50, décembre 1926, pp. 187-188.

⁵² *Manifestation à Londres en l'honneur de Mme Montessori*, «La Nouvelle Éducation», n. 76, juin 1929, pp. 109-111.

⁵³ *Le XXe Cours International Montessori*, «La Nouvelle Éducation», n. 125, mai 1934, pp. 65-66: l'annonce continue avec des informations pratiques: «Une classe Montessori recevra gratuitement les enfants de 3 à 7 ans dont les mères voudront assister au cours, et des facilités seront accordées aux étudiants qui ne pourraient arriver que le 1er août. Mais, vu la courte durée du cours, nous prions chacun de faire tous ses efforts pour y arriver dès le début, et après avoir lu *La Pédagogie scientifique* de Maria Montessori (Larousse édit.)».

⁵⁴ B. Harvaux, G. Féry, *Le XXe Cours International Montessori*, Nice, 1934, «La Nouvelle

Après le Cours de Nice, Hélène Lubienska de Lenval qui a enseigné aux côtés de Maria Montessori en s'occupant plus particulièrement de l'éducation sensorielle et de l'enseignement du français, rédige des *Leçons d'initiation à la Méthode Montessori*, un cours par correspondance destiné aux adhérents de La Nouvelle Éducation. En 1947, les éditions Spes publient une version augmentée de ces leçons sous le titre *La Méthode Montessori*⁵⁵ (deux chapitres *L'éducation morale et religieuse* et *Métaphysique montessorienne* sont ajoutés) pour suppléer au manque de livres récents sur le sujet. Outre la concision et l'extrême fidélité à la pensée de Maria Montessori, le grand intérêt réside aussi dans le fait que Lubienska s'inspire de documents inédits, d'ouvrages de Maria Montessori traduits dans d'autres langues et de ses nombreuses notes personnelles.

Mais davantage peut-être que par la publication de textes dans la revue, c'est par le travail de terrain, patient et minutieux, des sociétaires qui se réunissent⁵⁶, sillonnent la France pour donner des conférences aux enseignants et continuent de se former à travers les Cercles d'études⁵⁷ que peut se manifester l'impact réel de l'action de La Nouvelle Éducation.

6. Pour l'ère nouvelle – La revue des pionniers de l'éducation

Bien que Maria Montessori ait pris ses distances avec le mouvement de l'éducation nouvelle, sa revue officielle œuvra néanmoins à la divulgation des idées et de la Méthode Montessori en langue française. «Pour l'ère nouvelle», «The New Era», «Das werdende Zeitalter»: ce sont les trois éditions de la revue créée lors du Congrès de la fondation de la Ligue internationale pour l'éducation nouvelle de Calais en 1921, auquel participa Maria Montessori. Le rédacteur de l'édition française est le suisse Adolphe Ferrière qui prend ce travail très à cœur et en fait un peu sa revue personnelle, il signe une grande partie des articles et fait une bonne publicité à ses livres. Dans cette revue, Montessori ne jouit pas d'un *a priori* positif comme c'est le cas avec «La Nouvelle Éducation», la rédaction la considère comme une méthode parmi d'autres.

Les articles signés Maria Montessori reprennent le texte de conférences prononcées principalement lors des Congrès de la Ligue. *La discipline et la*

Éducation», n. 129, novembre 1934, p. 155.

⁵⁵ Les éditions Don Bosco publient à nouveau cet ouvrage en 2001.

⁵⁶ *Présentation du rapport de l'assemblée annuelle*, «La Nouvelle Éducation», n. 136, juin 1935, p. 81: «dans une réunion de montessoriennes nous avons pris des décisions importantes concernant la fabrication du matériel et l'organisation d'un cours à Paris. Nous en reparlerons...».

⁵⁷ Le cercle du Havre commence une étude méthodique de la méthode Montessori. Les passages essentiels du livre de D.C. Fischer sont lus et commentés et provoquent un entretien animé et fructueux cité dans «La Nouvelle Éducation», n. 129, novembre 1934, p. 162.

*liberté*⁵⁸: voilà deux sujets souvent mal compris quand on évoque la Méthode Montessori. Après avoir fait un compte-rendu de la tournée de conférences en Argentine de Maria Montessori en 1926, la revue publie un exposé résumant ces deux conférences rédigé par une revue italienne.

*Les principes de la psychologie appliqués à l'éducation*⁵⁹ est le titre de son intervention au Ve Congrès de la Ligue internationale pour l'Éducation nouvelle à Elsenør au Danemark en 1929 devant 2.000 congressistes (dont 46 français) où

en des termes inoubliables elle a parlé avec la majesté d'une reine: et certes elle l'est si l'on songe à la portée de ses principes d'auto-éducation. Aux sceptiques, elle se contente de répondre par les faits, par les centaines d'écoles où des petits enfants du peuple, dociles et heureux, apprennent toute chose utile à cet âge selon sa méthode d'auto-éducation: matériel et choix libre. (Souhaitons que dans les sections sur les "enfants difficiles" et sur la "psychologie des types", elle ait eu aussi un écho des méthodes thérapeutiques et d'individualisation, compléments nécessaires de sa méthode essentiellement physiologique, normale et faite pour des enfants normaux)⁶⁰.

La VIe édition du Congrès *L'éducation dans ses rapports avec l'évolution sociale*, attire à Nice en 1932 près de 1800 congressistes de 43 pays différents. La conclusion de la conférence de Maria Montessori *Mobilisation nouvelle*⁶¹ montre que le fait de transformer la discipline en une discipline intérieure est un véritable facteur d'évolution sociale: «Mais ceux qui s'arrêtent à l'observation la plus superficielle et voient une école harmonieuse dans sa simplicité, où les enfants travaillent sans se fatiguer, en fortifiant leur caractère, sans que la maîtresse intervienne pour enseigner ou corriger, doivent être frappés du fait nouveau que l'enfant s'est attaché à une source directive intérieure, au lieu d'être attaché à la volonté du maître qui le pousse en avant». Soulignons au passage que l'intervention de l'inspectrice générale des écoles maternelles en France sur les tendances actuelles⁶², ne mentionne pas une seule fois le nom de Montessori alors qu'elle évoque Froebel et Decroly. Est-ce voulu ou bien cela reflète-t-il la réalité? Est-ce comme elle l'indique «la répugnance que nous éprouvons nous Français, pour une certaine forme de systématisation, dérivée d'une certaine

⁵⁸ M. Montessori, *La discipline et la liberté*, «Pour l'ère nouvelle», n. 29, juin 1927, pp. 111-113 déjà publié sur «La Coltura popolare».

⁵⁹ M. Montessori, *Les principes de la psychologie appliqués à l'éducation*, «Pour l'ère nouvelle», n. 51, octobre 1929, pp. 221-223.

⁶⁰ A. Ferrière, *Chronique du Congrès*, «Pour l'ère nouvelle», n. 51, octobre 1929, pp. 224-225.

⁶¹ M. Montessori, *Mobilisation nouvelle*, «Pour l'ère nouvelle», n. 80, août-septembre 1932, pp. 206-208.

⁶² Mme Coirault, *Les tendances actuelles de l'école maternelle française*, «Pour l'ère nouvelle», n. 83, décembre 1932, pp. 319-322.

forme de philosophie?». Le commentaire rédigé par Élise Freinet⁶³ à propos du Congrès de Nice n'épargne pas Maria Montessori:

le congrès de Nice fut tout entier dominé par le prestige de Mme Montessori. Un train spécial avait amené son matériel; de nombreuses salles lui avaient été réservées dans ce vaste palais de la Méditerranée. Des enfants idéalement sages et beaux, mais comme d'un autre âge dans leurs fanfreluches rococo, évoluaient au milieu du matériel de luxe qui les sollicitait. Nous les regardions avec une sorte d'étonnement manier en silence, avec dextérité, les surfaces et les cubes, et tous ces objets de l'immobilité qui conduisent parfois à des virtuosités de racines carrées ou de racines cubiques nous plaçaient dans une atmosphère de singes savants... Nous pensions à nos petits élèves hirsutes et débraillés, si spontanés dans leurs gestes et dans leurs élans, et le souvenir de nos classes bourdonnantes s'imposait à nous et nous empêchait de comprendre peut-être ce qui se cachait de vérité dans les jeux des petits prestidigitateurs montessoriens.

Élise Freinet se laissa-t-elle influencer par le cadre fastueux? Les classes Montessori bourdonnent elles aussi d'activités, est-ce une question de 'rivalité'? Les chroniques du Congrès rédigées par la revue ne mentionnent guère Maria Montessori.

Le dernier article de Montessori est un extrait d'une conférence sur *Les étapes de l'éducation*⁶⁴.

L'article intitulé *Les précurseurs de Madame Montessori*⁶⁵ est particulièrement intéressant: l'auteur évoque la «dictature Montessori» en vogue à l'époque en Hollande. Il soulève aussi la question de savoir quelle valeur a le matériel si l'enfant ne le désire pas spontanément et s'il est indirectement forcé à l'utiliser, il remet aussi en cause la conception de Montessori qui «croit avoir établi expérimentalement que ce matériel représente ce dont l'enfant a besoin à un certain âge et à un moment donné». La deuxième partie présente un tableau récapitulatif des différents matériaux de Séguin, Bourneville, des Frères de la Charité de Gand et de Montessori, un outil précieux pour les historiens. Deux autres articles présentent la vie des écoles Montessori dans le Tessin: *L'esprit de la méthode Montessori, telle qu'elle est appliquée dans les écoles enfantines du Tessin*⁶⁶ et *La méthode Montessori dans les écoles primaires du Canton du Tessin*⁶⁷. *Un témoignage hollandais en faveur de la Méthode Montessori*⁶⁸ est

⁶³ É. Freinet, *Naissance d'une pédagogie populaire, historique de l'école moderne*, Paris, Maspero, 1968, p. 87.

⁶⁴ M. Montessori, *Les étapes de l'éducation*, «Pour l'ère nouvelle», n. 122, novembre 1936, pp. 269-271.

⁶⁵ C. Philippi Van Reeseema, *Les précurseurs de Mme Montessori*, «Pour l'ère nouvelle», n. 21, juillet 1926, pp. 82-85; 22, septembre 1926, pp. 119-126 et 23, novembre 1926, pp. 171-174.

⁶⁶ M. Valli, *L'esprit de la méthode Montessori, telle qu'elle est appliquée dans les écoles enfantines du Tessin*, «Pour l'ère nouvelle», n. 2, 1922, p. 37.

⁶⁷ L. Briod, *La méthode Montessori dans les écoles primaires du Canton du Tessin*, «Pour l'ère nouvelle», n. 12, octobre 1924, pp. 65-67.

⁶⁸ C. L. De Ligt van Rossem, *Un témoignage hollandais en faveur de la Méthode Montessori*, «Pour l'ère nouvelle», n. 29, juin 1927, pp. 113-115.

extrait de l'opuscule rédigé par une mère de famille qui a obtenu le premier prix du concours de vulgarisation des principes montessoriens.

7. *Fondation de l'Association Montessori de France*

La venue de Maria Montessori à Paris en 1931 sera aussi l'occasion de fonder l'Association Montessori de France, un groupement bénévole ayant pour idée de faire connaître les principes de son enseignement⁶⁹. On imagine aisément que la création de cette association poursuit aussi l'objectif de consolider les établissements créés en veillant à la formation des enseignants et à la fidélité aux idées de Maria Montessori mais aussi d'éviter les divisions. Mme G.J.J. Bernard sera l'âme de l'association et sa présidente après la guerre. On lui doit aussi la traduction des principaux ouvrages de Maria Montessori en langue française: *La paix et l'éducation* sort en 1932 édité par le Bureau international d'éducation à Genève, une deuxième édition paraît en 1949, c'est le seul ouvrage qui n'est pas publié par Desclée de Brouwer ni traduit par G.J.J. Bernard. En 1935, *L'enfant* est le premier livre traduit par G.J.J. Bernard aux éditions Desclée de Brouwer et sera réédité en 1947, 1959, 1965. *Les étapes de l'éducation* traduit par G. Bernard sort en 1936. *De l'enfant à l'adolescent* est publié en 1948 et à nouveau en 1960. *La messe vécue par les enfants* en 1950 et *L'éducation religieuse. La vie en Jésus-Christ* sort en 1956. *L'esprit absorbant de l'enfant* en 1959 avec la traductrice et l'éditeur identiques. En 1952 est disponible une nouvelle traduction par G.J.J. Bernard de *La Pédagogie scientifique. La découverte de l'enfant* avec une introduction de Mario Montessori.

8. *Une histoire inachevée*

C'est seulement la genèse de l'histoire du Montessori en France qui a été retracée ici. Après 1934, le mouvement Montessori poursuivra sa voie parfois de manière hésitante. Même si des personnalités de premier plan le soutiendront, comme R. Schuman et G. Marcel pour ne citer qu'eux, les écoles Montessori ne connaîtront pas vraiment le succès qui est le leur d'autres pays européens.

Croire que les écoles françaises n'ont pas eu besoin de connaître les principes éducatifs de Maria Montessori pour les appliquer nous semble inconvenant. Loin de nous l'idée de renier ou diminuer les nombreux changements positifs introduits par P. Kergomard. Mais pourquoi alors autant d'enseignantes étaient-

⁶⁹ <http://www.montessori-france.asso.fr/page_modele_01/show/sous_menu_id/1/id/4>, consulté le 18 décembre 2013.

elles fascinées par des enfants travaillant dans une classe Montessori? On peut supposer qu'il y avait là quelque chose qu'elle ne vivait pas dans la leur.

Pour la [Maria Montessori] suivre, nous n'avons pas à changer notre voie. Bien au contraire, son œuvre ne fait qu'assurer notre marche. Par elle, nous savons mieux où nous allons; grâce à elle, nous pouvons rectifier ce qu'il y avait encore d'incertain dans notre démarche. Et sans doute serons-nous plus sûrs d'arriver au but en ajoutant à la très sûre et très souple méthode qu'elle nous donne, tout ce que nous avons déjà trouvé dans le même sens⁷⁰.

Ces paroles écrites en 1921, en conclusion du livre de Flayol, sont-elles toujours d'actualité? Aujourd'hui, beaucoup soutiennent que l'enseignement a besoin de retrouver le cap, et si la méthode Montessori ne faisait qu'indiquer la destination, dans le flou actuel, cela serait déjà très précieux. Flou dû à l'influence des idéologies qui veulent faire du nouveau à tout prix sans base solide, en faisant fi de la globalité de la personnalité de l'enfant et de son développement. Comme le disait Péguy: «Le triomphe des démagogies est passager. Mais les ruines sont éternelles»⁷¹ et s'il est un domaine où les démagogies causent énormément de dégâts, c'est bien celui où les victimes sont des enfants. S'inspirer de la Méthode Montessori, au moins pour la petite enfance et les classes maternelles, permettrait d'asseoir la personnalité enfantine sur une fondation solide et résistante, nécessaire pour une reconstruction plus aisée. Il n'est pas encore trop tard pour redécouvrir et appliquer une 'nouvelle' méthode d'éducation qui fait ses preuves depuis plus d'un siècle. Nouvelle non pas tant pour le matériel qui est le sien mais pour le regard qu'elle pose sur l'enfant et le respect qu'elle lui accorde. Nouvelle pour la profondeur de son influence, respectueuse du tout petit. Nouvelle pour ses connaissances du développement de l'enfant, intuitives à l'époque de Montessori, souvent confirmées par les découvertes des neurosciences.

⁷⁰ E. Flayol, *La méthode Montessori en action. Théorie-pratique-critique*, Paris, Nathan, 1921, p. 126.

⁷¹ C. Péguy, *Pensées*, Gallimard, Paris 1934, p. 80.

Perino's books and magazines for children: a new way to widen young readership in Italy (1882-1897)

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ABSTRACT: The publisher Edoardo Perino had an important role in the late XIX century in the widening of readership in Italy and also in modernizing the Italian and, moreover, Roman book market. Very well-known at that time, during the XX century he was forgotten because his publishing firm closed just two years after his death and his reputation has been lost to such a degree that nowadays he is known only among few Italian book historians. Based on the commercial publisher's catalogue, the A. retraces the work, the production and the cultural network of Perino, who embodied the new 'new way' of doing publishing in Italy in the new era of Unification.

EET/TEE KEYWORDS: Children's and Youth Literature; Periodical; Publishing Industry; Cultural Policy; Italy; XIX Century.

The catalogue of Perino's publications, rich and varied, could be compared to a sort of museum of oddities in which we can see the lowest things next to the noblest; but except for a few volumes very well considered for printing quality and accuracy, everything else reveals the vulgar and tasteless nature of their publisher¹.

Disregarded by contemporaries who define him a «buzurro» [boorish], the publisher Edoardo Perino instead had an important role in the late XIX century in the widening of readership in Italy and also he modernized the Italian and,

¹ «Il catalogo delle edizioni Perino, copioso e vario, può essere paragonato ad uno di quei musei di curiosità nei quali si vedono gli oggetti più vili accanto ai più aristocratici; ma tranne pochissimi volumi veramente pregevoli per forma tipografica e correttezza, gli altri tutti tradiscono l'indole tumultuariamente volgare del loro editore.» The translation is mine. G. Bobbio, *Fra tipi e copie: variazioni su temi tipografici*, Roma, Tipografia del Senato, 1913, pp. 277-278.

moreover, Roman book market. Very well-known at that time, during the XX century he was forgotten because his publishing firm closed just two years after his death and his reputation has been lost to such a degree that nowadays he is known only among few Italian book historians².

Perino contributed in an effective way to modernizing the Roman publishing market by offering a new model of publisher, free from ecclesiastical commissions, oriented to the new middle and working classes, and aggressive towards market rules by acting directly on supply and demand. In this process of modernization its business complemented Angelo Sommaruga's, another publisher who moved to Rome from Milan, specializing instead in journals and publications for the highest and learned classes, very well-known for his magazine «Cronaca Bizantina», which had among its editorial staff Giosuè Carducci, Luigi Capuana, Giovanni Verga, Carlo Dossi and Gabriele d'Annunzio³. Indeed the life and style of Perino is a perfect example of a new way of doing publishing in Italy in the new era of Unification, a kind of model that was established exactly in these years and Perino gave strong support to this model⁴.

Edoardo Perino was born in Turin on the 15th of October 1845 from Antonio Perino and Felicita Magnone. His father and brother were both printers and they taught this profession to Edoardo. In 1865, when he was 20 years old, he moved to Florence, the new capital of the Kingdom of Italy, and he worked in charge of printing at the newspaper «La Riforma». Just few months after the Porta Pia Breach (the 21st of September 1870) and the occupation of Rome, Perino moved there, to the new capital of Italy where he decided to work freelance. In December 1870 he was already in Rome and he opened a newspaper agency in Piazza Colonna, the political centre of the new government, where he had newspapers and magazines come also from abroad. At the same time he began a little printing activity, for example he printed broadsheets, notices, cards etc. etc. His publishing business began later, in 1883, when he bought machines coming from Tipografia Bodoniana, quite a big Roman printing house. Even if he continued his job at the newspaper store, Perino started to publish magazines and books on his own. His final achievement as a publisher was in 1885 when he moved to a big establishment in Via del Lavatore (near the Fontana di Trevi), where he modernized all the equipment; at that time he had one hundred

² M.I. Palazzolo, S. Mori, G. Bacci, *Edoardo Perino. Un editore popolare nell'Italia umbertina*, Milano, Franco Angeli, 2012.

³ About Sommaruga see his memoirs A. Sommaruga, *Cronaca bizantina: 1881-1885: note e ricordi*, Milano, Mondadori, 1941 and also G. Squarciapino, *Roma bizantina. Società e letteratura ai tempi di Angelo Sommaruga*, Torino, Einaudi, 1950. Some articles and abstracts from his journals and magazines are in E. Ghidetti (ed.), *Roma Bizantina*, Milano, Longanesi, 1979.

⁴ See N. Tranfaglia, A. Vittoria, *Storia degli editori italiani: dall'Unità alla fine degli anni Sessanta*, nuova ed., Roma-Bari, Laterza, 2007, A. Gigli Marchetti, *Le nuove dimensioni dell'impresa editoriale*, in G. Turi (ed.), *Storia dell'editoria nell'Italia contemporanea*, Firenze, Giunti, 1997, pp. 115-163.

workers⁵. Every year Perino would launch two new collections of books, a lot of magazines, and two daily newspapers. Unfortunately malaria brought his activity to a halt and he died at 50 in 1895. His business did not survive him: the social and economic crisis, that affected Italy at the end of the century and also led to riots of workers and peasants, had also a strong influence on the book market. Only the publishing firms able to collect capital and liquid assets from banks or other investors survived⁶. On the contrary Perino's widow and his son decided to declare bankruptcy one year after Edoardo's death.

Even if it was brief, only about 15 years, the publishing activity of Perino was frenetic, full of creativity and skill and certainly it contributed to modernizing the Roman publishing environment, which was poor, lethargic and principally related to the single purchaser, the Church⁷. Perino tried to repeat the experience and success of Salani in Florence and of Sonzogno in Milan⁸, but he decided to specialize his production much more in the sale of books by instalments⁹. His catalogue in those years also pointed to a growing popular readership and Perino suggested and supported a new model for publishing, aimed at the new national bourgeoisie.

Perino's editions were characterized by a huge production of collections, called 'libraries', which offered a series of texts collected on the same theme or for the same type of readership, women, children, workers¹⁰. A collection was better than a single book because it could offer a safe package to the reader who could easily become faithful to its books and able to identify them in bookshops and kiosks¹¹.

⁵ See also U. Vichi, *Edoardo Perino stampatore per il popolo*, Roma, a cura dell'Alma Roma, 1967.

⁶ See E. Declava, *Un panorama in evoluzione*, in *Storia dell'editoria nell'Italia contemporanea*, cit., pp. 225-298.

⁷ See M.I. Palazzolo, *L'editoria romana tra dominio pontificio e unificazione italiana*, «Ricerche storiche», vol. XXV, n. 3, 1995, pp. 635-670 and Ead., *Editoria e istituzioni a Roma tra Settecento e Ottocento. Saggi e documenti*, Roma, Archivio Izzi, 1994.

⁸ A. Gigli Marchetti, *Libri buoni a buon prezzo. Le edizioni Salani (1862-1986)*, Milano, Franco Angeli, 2011; L. Barile, *Le parole illustrate: Edoardo Sonzogno editore del popolo*, Modena, Mucchi, 1994.

⁹ In Italy there's no a specific bibliography on the instalment production, but only some mentions in books about popular literature as the ones I cited above on Salani and Sonzogno. For some other references see G. Solari, *Littérature à un sous, à deux sous, à trois sous: permanences et transformations de l'impression populaire en Italie à la fin du XIX siècle*, in D. Julia (ed.), *Culture et société dans l'Europe moderne et contemporaine*, «Annuaire du département t d'Histoire et Civilisation de l'Institution universitaire européen de Florence», 1992, pp. 59-88 and the collected volume L. Braidà, M. Infelise (edd.), *Libri per tutti. Generi editoriali di larga circolazione tra antico regime e età contemporanea*, Torino, Utet, 2010. For France instead we can see a detailed catalogue in C. Witkowski, *Monographie des éditions populaires. Les romans à quatre sous. Les publications illustrées à 20 centimes. 1848-1870*, Paris, Compagnie Jean-Jacques Prevert, 1981.

¹⁰ A. Chemello, *La biblioteca del buon operaio: romanzi e precetti per il popolo nell'Italia unita*, Milano, Unicopli, 2009.

¹¹ About series see *The culture of the publisher's series*. Vol. I: *Authors, publishers and the*

A lot of Perino's series followed models already printed by other Italian publishers. For example he produced the «Biblioteca classica per il popolo» [Classic Library for the people] at a cost of 50 cents a volume, very similar to the series of Treves or Sonzogno. Every volume had a green cover with an ornamental frame and in the middle the title and the author's name. The «Piccola Biblioteca amena» [Little amusing Library] was cheaper, only 15 cents a volume, and it included novels by Zola, Dickens, Maupassant, Hugo and Sue. As we can read in the advertisement it was made for reading on trains, like the well-known series published by Tauschniz from Leipzig.

The «Biblioteca Nova» [New Library], a series sold for 25 cents, had the purpose of «[...] make widespread, through the low price, the most remarkable works and making popular other ones less known but deserving to be studied by everybody»¹². Perino tried to not disregard the editing and packaging and he explained in the advertisement that:

A volume will be published every week, of 100 pages or more, in an accurate and elegant edition that contains in addition to an important work by a well-known ancient or modern, foreigner or Italian, author, an introduction with a complete biography and bibliography¹³.

Actually the catalogue seems to reflect the purposes, containing for example, Carducci, Dante, Machiavelli, Boccaccio, Faldella, Lessona, Leopardi, Giovanni Prati, Verga, and also German, French and English authors like Schiller, Perrault, Dickens, Diderot, Hugo and Zola, but also some classics like Virgil and Homer. A series that became a competitor for ones produced by other Italian publishers is the «Biblioteca Perino», «the cheapest and the best of every other similar series»¹⁴, as we can read in the heading on the cover. The style and choice of this series was more amusing and includes a lot of works by Casanova and Fortuné du Boisgobey, one of the most important French feuilleton authors. Another series called «Biblioteca Diamante» [Diamond Library] was inspired by a series begun in the fifties by Gaspero Barbèra and includes classics: from Dante and Ariosto to Leopardi. In addition to all these series about literature Perino published many collections about geography, especially travel literature, theatre and history.

Surely the most successful was a series called the «Processi celebri» [Famous trials], composed of ten volumes plus some special editions in a larger format

shaping of taste, ed. by J. Spiers, Basingstoke, Palgrave MacMillan, 2011.

¹² «[...] rendere diffusissime, mediante la tenuità del prezzo, le opere più conosciute, e di far conoscere al popolo quelle che, meno cognite, meritano pur tuttavia di essere lette e studiate da tutti».

¹³ «Si pubblicherà un volume ogni settimana, di 100 e più pagine, in elegantissima ed accuratissima edizione, che oltre ad uno scelto lavoro di autore celebre antico o moderno, italiano o straniero, conterrà anche come prefazione, un accurato cenno sulla vita e sulle opere dell'autore che viene, nel volume, presentato ai lettori».

¹⁴ «La più economica e la migliore di tutte le altre collezioni di simil genere».

with illustrations or volumes specialized in some particular crime, such as infanticides or crimes of passion. The attention to morbid curiosity could be found also in collections like the «Biblioteca magica. Spiegazione delle scienze occulte e del mondo soprannaturale» [Magic Library. Explanation of the occult and supernatural] and in the various versions of the *Mysteries*, books inspired by *Les Mysteres de Paris* di Eugene Sue, and devoted not only to some Italian towns, Rome, Naples and Florence, but also to subjects such as Anarchism, the Vatican and the Inquisition¹⁵.

These books are made of low-cost paper with a great use of illustrations, although they are sometimes rough and unsophisticated. But, as Perino explains in the heading of some of his publications: «The illustrations help the reading». However when we have a look at these covers we have the impression that the images are made to provoke emotions and curiosity more than to explain; sometimes they contain cryptic references or a play on words¹⁶. Perino also founded a lot of magazines; often they are little four-page papers with a short life (from only few months to some years) but rich in ideas and experiments: from political journals to funny magazines and others dedicated to women or children.

From the middle of the '80s the publisher decided to invest in the young audience and he involved in this project important partners, from journalists to writers and educators, and finding new talent, like Grazia Deledda, who published very young her first articles and novels in Perino's publications¹⁷. The reign of Umberto I was in fact the period in Italy when, for the first time, the focus on childhood education and entertainment was channelled into publishing projects, sometimes important, like magazines, books and series where the figurative dimension assumed a new value and the images were integrated into the text¹⁸.

In 1884, in the wake of the success of *Pinocchio* by Collodi, Perino reprinted *I racconti delle fate*, an anthology edited and translated from French by Carlo

¹⁵ See G. Ania, B. Moloney, «Analoghi vituperi»: la bibliografia del romanzo dei misteri in Italia, «La Bibliofilia», vol. 106, n. 2, 2004, pp. 173-213. See also A. Chemello, *La letteratura popolare e il consumo*, in *Storia dell'editoria nell'Italia contemporanea*, cit., pp. 171-182. E. Ghidetti, *Un aspetto della letteratura in Toscana: i Misteri*, in I. Porciani (ed.), *Editori a Firenze nel secondo Ottocento: atti del Convegno (13-15 novembre 1981): Gabinetto scientifico letterario di G.P. Vieusseux*, Firenze, Leo S. Olschki, 1983.

¹⁶ G. Bacci, *Le illustrazioni in Italia tra Otto e Novecento. Libri a figure, dinamiche culturali e visive*, Firenze, Leo S. Olschki, 2009.

¹⁷ See R. Carrarini, *Il paradiso dei bambini: libri e periodici per l'infanzia dell'editore romano Edoardo Perino*, in L. Finocchi, A. Gigli Marchetti (edd.), *Editori e piccoli lettori tra Otto e Novecento*, Milano, Franco Angeli, 2004, pp. 109-120.

¹⁸ See M. Colin, *L'age d'or de la littérature d'enfance et de jeunesse italienne: des origines au fascisme*, Caen, Université de Caen, 2005; Ead. (ed.), *La littérature de jeunesse italienne du 20. siècle*, Caen, Paris Université Club, 2011; P. Boero, C. De Luca, *La letteratura per l'infanzia*, Bari-Roma, Laterza, 2009 and *Inchostri per l'infanzia: letteratura ed editoria in Italia dal 1880 al 1965*, Roma, De Luca, 1998.

Lorenzini, first published in 1876 for the Florentine publisher Paggi. It was a collection of nine fables by Charles Perrault, four tales by Marie-Catherine d'Aulnoy and two tales by Jeanne-Marie Le Prince de Beaumont which, in Paggi's edition, were all illustrated by Enrico Mazzanti¹⁹.

In April 1886 Perino founded a series specifically dedicated to young people which was firstly called «Biblioteca popolare per i ragazzi» [Popular Library for Children] and after a few months the name was changed in «Biblioteca illustrata per i ragazzi» [Illustrated Library for Children]. Only in October of the same year the title of the series settled on «Biblioteca fantastica illustrata» [Illustrated Fantasy Library], a name that had the quality of being different from any others printed by other Italian publishers, like the «Biblioteca illustrata dei fanciulli» [Illustrated Library for Children] of Sonzogno, started three years earlier²⁰. Probably the name was chosen by the director of the series, Onorato Roux who, as the two other valuable collaborators of the young sector of the publishing house Emma Perodi and Epaminonda Provaglio, he had developed during the years a preference for fantasy and adventure subjects. Roux was a teacher and an educator, later he became an employee at the War Ministry, who, since a few years earlier, became a journalist writing articles for Roman newspapers and magazines. His writing passion was transformed by Perino from an occasional job to a regular one and he continued to work as a writer beyond the publisher's death. It was the relationship he managed to have with writers and authors during the Perino years that became useful for one of the most important books of his career: an anthology of letters and memories that he had kept from important Italian artists he had met during his life²¹.

Than at the time of Perino's death he continued his journalistic activity with the publishers Calzone and Villa and, for a short time, directed the magazine «Il Novellino» which later became well-known because of the collaboration of Yambo (Enrico Novelli)²².

Perino was very proud of the series and pleased with its success:

The idea of creating Biblioteca fantastica where all these works are collected of human brilliance that refer to the marvelous and supernatural is new in Italy and not overworked as in so many others in Europe. This explains the amazing success it was received with²³.

¹⁹ On this first edition of this anthology and the role of the editor Carlo Lorenzini see P. Boero, C. De Luca, *La letteratura per l'infanzia*, cit., pp. 27-28.

²⁰ See V. D'Angella, *La Biblioteca illustrata dei fanciulli di Edoardo Sonzogno*, «La Fabbrica del libro. Bollettino di storia dell'editoria in Italia», vol. XIV. n. 1, 2008, pp. 6-12.

²¹ O. Roux, *Infanzia e giovinezza di illustri italiani contemporanei: memorie autobiografiche di letterati, artisti, scienziati... raccolte e corredate di cenni biografici*, Firenze, Bemporad, 1909.

²² About Enrico Novelli see the item on *Dizionario biografico degli Italiani* that could be consulted at <[http://www.treccani.it/enciclopedia/enrico-novelli_\(Dizionario-Biografico\)](http://www.treccani.it/enciclopedia/enrico-novelli_(Dizionario-Biografico))> (last access: July 18th, 2014).

²³ «L'idea di creare una Biblioteca fantastica nella quale raccogliere tutte quelle produzioni dell'umano ingegno che si riferiscono al meraviglioso, al soprannaturale è nuova in Italia, e non abusata, come tante altre in Europa. Di qui lo straordinario favore con cui fu accolta». *Catalogo*

The works were published in illustrated instalments of eight pages every two or three weeks at five cents each, almost always a total of 160 pages a volume, that could be purchased when complete for about a lira. The price could vary not only depending of the length of the volume but also the type of binding because luxury editions were planned «with rich bindings and gold decoration [...] worthy of serving as prizes, Christmas presents and New Years's gifts»²⁴.

The publication by instalments was a practice started in England in the first half of XIX century; *Pickwick Papers* by Charles Dickens was published in this way between March 1836 and October 1837, and the practice became widespread in France supporting and adding to the market of the feuilleton, whereas in Italy it came about later, probably slowed down by the lack of literacy and the fact that people read little²⁵.

The first title in the series are two classics of fantasy *The Surprising Adventures of Baron Münchhausen*, by Rudolph Erich Raspe and Gottfried August Bürger and *Gulliver's Travels* by Jonathan Swift, in an abridged edition for children and illustrations by Gino de' Bini, one of the illustrators in the Perino circle. The edition of *Gulliver's Travels* had of course been expurgated of the satirical and misanthropic aspects that the original obviously had, so the work became simply a fantastic story. This type of adaptation was very common practice at the time: a text from the literary tradition aimed at an adult public, also because it had been written at a time when reading for children was not yet developed, was the object of big cuts and additions maintaining only the adventure aspect of the original²⁶.

In the publicity poster for the volume by Raspe, designed by Tavio (the pseudonym of Ottavio Rodella) showing the baron sitting on a cannon's ball, demonstrates the values of what was in effect a classic that ran into many editions and adaptations²⁷:

generale dello stabilimento, cit., p. 35.

²⁴ «con ricche rilegature e grandi fregi d'oro [...] pregevoli e degne di servire per premi, doni natalizi, strenne di Capodanno». *Ibid.*

²⁵ On feuilleton circulation and production in Europe see J.O. Jordan, R.L. Patten (edd.), *Literature in the marketplace: nineteenth-century British publishing and reading practice*, Cambridge, Cambridge University press, 1995. For France see C. Haynes, *Lost illusions: the politics of publishing in nineteenth-century France*, Cambridge, Harvard University Press, 2010.

²⁶ See M.I. Palazzolo, *L'editore come autore: traduzioni e libri per ragazzi*, in Finocchi, Gigli Marchetti (edd.), *Editori e piccoli lettori tra Otto e Novecento*, cit., pp. 72-82. For a detailed report of a conference on this specific subject see E. Marazzi, *Il libro per l'infanzia oggetto di traduzioni e adattamenti*, «History of Education & Children's Literature», vol. V, n. 1, 2010, pp. 433-438.

²⁷ Hieronymus Carl Friedrich Baron von Münchhausen was a real person who lived in Germany during the XVIII century. He was a German nobleman and a famous teller of amazing tales. In 1781-1783 seventeen tales attributed to him appeared in a German collection of books. An English version was published in London in 1785, by Rudolf Erich Raspe, as *Baron Münchhausen's Narrative of his Marvellous Travels and Campaigns in Russia*, also called *The Surprising Adventures of Baron Münchhausen*. It remains unclear how much of Raspe's story

The humour of these adventures is so good that it attracts and feeds also the most rigid minds. The caricature of the braggart is so successful and so funny that it leads to hilarity and, at the same time, it is so indulgent that it makes the protagonist hero universally liked. The illustrations, done specially for this book, complete the text and contribute to the pleasure of the readers²⁸.

In issue twelve is explained clearly which edition has been chosen and which additions have been made:

To the adventure of Raspe and Burger we had some inspired by the important painter from Ancona Francesco Podesti from the reading of the journeys of our hero. Morelli from Ancona published them under the title of *New Adventure of Baron Münchhausen*, a free version by Francesco Podesti, who pretended to have discovered the real manuscripts about the baron and to have been given permission to translate them by the great nephew of the likeable rogue. So, this edition, edited by Onorato Roux, is the most complete of all those published so far²⁹.

The success of the work led to imitation such as *Il seguito delle avventure del Barone Münchhausen* [The further Adventure of Baron Münchhausen] written by Francesco Lagnese, published a few years later by Perino in the same series³⁰.

Later the publisher devoted three volumes in the series to fairies and their stories, an anthology of the best fairy tales by Italian and foreign authors³¹, such as the Brothers Grimm, Charles Perrault and Hans Christian Andersen. Still continuing with the classics Perino published *Aesop's Fables* and *The Tales of Bertoldo, Bertoldino and Cacasenno* by Giulio Cesare Croce (1550-1609),

material derives from the Baron himself, but the majority of the stories are based on folktales that had been in circulation for many centuries before Münchhausen's birth. In 1786, Gottfried August Bürger translated Raspe's stories back into German, and extended them. He published them with the title of *Wunderbare Reisen zu Wasser und zu Lande: Feldzüge und lustige Abenteuer des Freiherrn von Münchhausen* [Marvellous Travels on Water and Land: Campaigns and Comical Adventures of the Baron of Münchhausen]. During the XIX century this collection of tales was expanded and translated many times and in different ways.

²⁸ «L'umorismo di queste avventure è di così buona lega che attrae e alletta anco le menti più severe. La caricatura dello spaccone è così ben riuscita e così comica che infonde ilarità, è così benevola nel tempo stesso, che procaccia le simpatie universali all'eroe protagonista. Le illustrazioni appositamente eseguite per questo libro, completano il testo e contribuiscono alla giocondità de' lettori». *Le Avventure del Barone Münchhausen. Manifesto*, Roma, Perino, 1886.

²⁹ «Alle avventure del Raspe e del Bürger, ne aggiungiamo alcune ispirate all'illustre pittore anconetano: Francesco Podesti dalla lettura dei viaggi del nostro eroe. Le pubblicò il Morelli di Ancona sotto il titolo di *Nuove Avventure del Barone di Munchausen* versione libera di Francesco Podesti; chè questi finge di aver scoperto i veri manoscritti del barone e di avere ottenuto la facoltà di tradurli dal pronipote dell'amenofanfarone. Quindi, questa edizione affidata alle cure di Onorato Roux, è la più completa di tutte quelle finora pubblicate». R.E. Raspe, *Le Avventure del Barone Munchhausen*, Roma, Perino, 1886, p. 48.

³⁰ F. Lagnese, *Avventure di un pazzo ossia l'erede del barone di Münchhausen*, Roma, Perino, 1889.

³¹ *Il Libro delle fate*, Roma, Perino, 1887 (in three volumes).

an Italian writer and storyteller. These volumes were not aimed only at children as explained in the publishing advertisement:

adults and children will find how to spend boring hours happily, how the reading of fairy tales becomes more attractive than a novel because of the fascination of fantasy [...]³².

Onorato Roux «totally faithful as an historian and researcher of popular tradition»³³ edited the three following collections *Nei regni incantati* [In the Enchanted Kingdoms], *Nei castelli fatati* [Fairy Castle] e *Nel paese delle fate* [In the Land of the Fairies]³⁴. Therefore the collection combined fantastic entertainment by taking up the popular narrative tradition which, in those years, the Palermo scholar and anthropologist Giuseppe Pitrè was very involved with. He was also a dear friend of another collaborator of this series, Emma Perodi³⁵. At the time of the start of her collaboration with our publisher she was already famous in the Roman and Italian journalistic and literary fields not only through her books for children but also by collaborating on journals like «Il Popolo romano» and «Il Fanfulla della Domenica». From 1883 Perodi began to work with «Il Giornale dei bambini» published by Oblieght and edited at that time by Collodi, after the first two years with Ferdinando Martini as founder and editor in chief. Giuseppe De' Rossi recalls how the editorship of the magazine was in effect in the hands of Perodi because Lorenzini had little desire to leave Florence³⁶. Some years later, in 1887, began her collaboration with Perino along with that with Treves at Milan. In the publicity for one of her books the Roman publisher expressed with pride having her among his collaborators:

³² «[...] grandi e piccini troveranno di che passare lietamente le ore noiose, chè la lettura delle fiabe riesce attraente più di quella di un romanzo, appunto per il fascino del meraviglioso» («Giornale illustrato per i ragazzi», vol. I, n. 38, 1886).

³³ «con scrupolosa fedeltà di storico e ricercatore di tradizioni popolari» («Cri Kri», vol. II, 15 luglio 1888, p. 4).

³⁴ See A. Carli, *Il volto nascosto della fiaba italiana di secondo Ottocento. Medicina, antropologia e folklore*, «History of Education & Children's Literature», vol. II, n. 1, 2007, pp. 217-239.

³⁵ About Emma Perodi see F. Depaolis, W. Scancarello (edd.), *Emma Perodi. Saggi critici e bibliografia (1850-2005)*, Firenze, Bibliografia e informazione, 2005. This book contains also a re-adaptation of an essay by P. Scapecchi, *Una donna tra le fate. Ricerche sulla vita e sulle opere di Emma Perodi*, Poppi, Edizioni della Biblioteca Rilliana, 1993. New additions and discoveries in *Le figure e le storie: scrittori, illustratori, editori per l'infanzia in Toscana tra Otto e Novecento*, ed. by W. Scancarello, F. Cambi, Pontedera, Bibliografia e Informazione, 2012.

³⁶ G. De Rossi, *Vita romana 1861-1922 dal memoriale di Eutichio Tuttibozzi trascritto da G. De Rossi*, Milano, 1928, cap. VII. Also De' Rossi was a Perino collaborator, indeed he was him that introduced and recommended a great part of Perino staff, probably he was the first contact with Emma Perodi.

Emma Perodi is one of the best female Italian and foreign writers of today. To her keen powers of observation equal to those of Sand she adds a dramatic power and abundance of imagination that is unique and rare. Her easy, simple, lively style fascinates and her natural dialogue is clever and sharp. All these qualities are to be found in her novel *La tragedia di un cuore* [The Tragedy of a Heart] where her passion erupts, subjugates and moves³⁷.

As Faeti maintains, the writer falls completely within logistic of pedagogical-liberal literature and she knows perfectly how to join in her own output all the literary genres that come from realism in its various forms, more or less linked to the canon of fantasy which is also understood in the various expressions from the fantastic to the uncanny³⁸.

In the «Biblioteca fantastica» Emma Perodi published between 1892 and 1893 *Le novelle della nonna* [The short stories of the Grandmother] in five volumes. The forty-five short stories, except one, set in Casentino are told by the Grandmother Regina who has collected around the fire all the Marcucci, a big family of sharecropper ('metayer') peasants. The framework, which is similar to famous literary models, in the writer's plan also has educational and moralizing functions:

the short stories of the grandmother instruct, educate and amuse, touching the most varied arguments and teach how to observe and reason. They develop the imagination of young readers, propagate in the world of the young all the most useful knowledge and impress it in an unforgettable way on the intellect of young boys and girls; they bring out great affection, and develop the noblest feelings; they are, in a word, a reading that pleases the young and the old and should be preferred by all³⁹.

Perodi also published in Perino «Biblioteca fantastica» *Le fate d'oro* [The golden Fairies] (1892), *Lo spirito degli animali* [The Spirit of Animals](1893) and *Le Fiabe dei fiori* [The fairy Tales of Flowers](1893) and her collaboration also extended to the magazine of the publisher aimed at children such as «Il

³⁷ «Emma Perodi è una delle migliori scrittrici del giorno, italiane ed estere. Ad uno spirito di osservazione e ad una fierezza di espansione che eguagliano quelli della Sand, accoppia una efficacia drammatica, e un'abbondanza di immaginazione più tosto unica e rara. Il suo stile facile, piano, brioso, affascina, il suo dialogo naturale è spigliato ed arguto. Tutte queste eminenti qualità rifulgono in questo romanzo *Tragedia di un Cuore* nel quale la passione erompe, soggioga e commuove», E. Perodi, *La tragedia di un cuore*, Roma, Perino, 1892.

³⁸ A. Faeti, *Il crepuscolo dell'orco pedagogico*, in E. Perodi, *Fiabe fantastiche. Le novelle della nonna*, ed. by A. Faeti, Torino Einaudi, 1974, some brief references about Perino at the pp. XII-XIII. For an analysis of some children authors, with a part dedicated to Emma Perodi, see A. Carli, *Prima del Corriere dei Piccoli: Ferdinando Martini, Carlo Collodi, Emma Perodi e Luigi Capuana fra giornalismo per l'infanzia, racconto realistico e fiaba moderna*, Macerata, eum, 2007.

³⁹ «Le Novelle della nonna istruiscono, educano e dilettono, toccano i più svariati argomenti e insegnano ad osservare ed a ragionare. Sviluppano l'immaginativa dei piccoli lettori, propagano nel mondo piccino, tutte le cognizioni più utili e le imprimono in modo indelebile nell'intelletto delle giovinette e dei ragazzi; suscitano gli affetti più gentili, invogliano all'emulazione e sviluppano i più nobili sentimenti. sono in una parola, una lettura amena che giova ai piccini e ai grandi e deve essere da tutti preferita», *Le Novelle della nonna. Manifesto*, Perino, Roma, 1890.

Tesoro dei bambini» edited by the writer from 1893 until October 1896. Her relationship with the publishing house in fact did not last long after the death of the founder.

Another prolific and original collaborator of the series was Epaminonda Provaglio⁴⁰, who for sometime had been a collaborator of Perino's even if until the end of the '80 he had not yet devoted himself to literature for children but had written biographies of Garibaldi and Giordano Bruno. Originally from Lombardy Provaglio was employed by Perino as a compositor and then proof-reader then becoming an important figure for the management of the printing house. As several letters written to Angelo de Gubernatis show it was often he who managed the relationship with authors and organized the daily activity of the printing⁴¹. In 1891 he published under the pseudonym of Contessa Elda di Montedoro his first work aimed at children *La Regina delle fate* [The Queen of the Fairies]. The work in three volumes, 480 pages in total, was decorated with 60 illustrations by Leonida Edel⁴² and described a fairy world made up of:

beautiful little queens with diamond eyes, golden hair and pearl teeth, nice handsome young little kings who look like angels and wear very rich clothes, marble palaces studded with jewels, animals that speak, trees that dance, strange monsters that constantly change shape, good fairies wrapped in splendid clouds, the bad genies who try in every way possible to cheat people⁴³.

The Provaglio books for children continued with *Il mago delle sette teste e il gigante marino* [The seven headed Wizard and the marine Giant] (1892), always in three volumes, *La bella maga Lona* [The beautiful Sorcerer Lona] (1894), *Nel mondo dei nani: avventure meravigliosissime di una famiglia di naufraghi* [In the Dwarves' World: amazing Adventures of a castaway Family] (1896), *Le fate della notte: fiabe per l'infanzia e l'adolescenza* [The night Fairies: Tales for Childhood and Adolescence] (1897). Evidence of quite a great success of these works is the many new editions printed by Nerbini and Salani in the first years of the XX century⁴⁴, whereas the author continued to be very productive until

⁴⁰ About Provaglio see the item in *Dizionario Biografico dell'Educazione*, Milano, Editrice Bibliografica, 2014.

⁴¹ See Letters from Edoardo Perino Printing House to Angelo De Gubernatis, Biblioteca Nazionale Centrale di Firenze, Carteggi, cass. 98, num. 4.

⁴² About Leonida Edel see the item on the *Dizionario biografico degli italiani*, also that could be consulted at <[http://www.treccani.it/enciclopedia/leonida-edel_\(Dizionario_Biografico\)](http://www.treccani.it/enciclopedia/leonida-edel_(Dizionario_Biografico))> (last access: July 18th, 2014).

⁴³ «belle reginotte dagli occhi di diamante, i capelli d'oro e i denti di perla, giovani reucci gentili e belli che somigliano agli angeli e portano per giunta dei vestiti ricchissimi, i palazzi di marmo tempestati di gemme, gli animali che parlano, gli alberi che ballano, i mostri strani che mutano forma ad ogni istante, le fate benefiche avvolte in splendidi nimbi, i geni malefici che cercano in tutti i modi di ingannare la gente...», *Catalogo generale dello stabilimento Perino*, Roma, Perino, 1890, p. 38.

⁴⁴ Nerbini edition presents as preface a letter written by Jules Verne to the author thanking for the copy of *Il Mago delle sette teste*, Perino edition.

his death in 1925, even if he added to his writing activity always proof-reading and translating from French to be able to eke out a living.

In 1890 Perino launched also a series called «Nel Regno dei fanciulli. Storielle amene istruttive e morali» [In the Children's Kingdom. Amusing, instructive and moral Tales] containing those published in illustrated and colourful instalments⁴⁵. For this series the publisher seems to have the objective of attracting not only the same audience but also that of schools and teachers:

The reading is one of the most effective means of educating the mind and the heart of young people, our hopes for the future; but reading training is never easy; we need to surprise them, to gain their attention, to tickle their lively imagination. This is the purpose of this collection of tales, rich in coloured illustrations, amusing in style and instructive and moral in subject. We recommend them especially to teachers at primary schools and in kindergartens for their pupils⁴⁶.

Despite these wishes, the series was interrupted after only one issue.

As already said, Perino launched many magazines for young people with the specific purpose of «educating with entertainment»⁴⁷. As we can read in the brief editorial entitled *Il nostro programma* [Our Project]:

The «Giornale illustrato per i ragazzi» will be a nice surprise for little Italian readers, a promise of beautiful, good and useful things, that will be maintained with great care thanks to the active cooperation of the best author ever. This journal will become the authentic echo of all Italian children, who will find in it the desired fun after school through the reading of enjoyable articles inspiring love for the family and an easy review of what the professors have taught at school, such as history, science and art history articles⁴⁸.

⁴⁵ *Nel Regno dei fanciulli. Manifesto*, Perino, Roma, 1890.

⁴⁶ «La lettura è uno dei mezzi più efficaci per educare la mente ed il cuore dei fanciulli, care speranze dell'avvenire; ma non sempre agevole torna l'avvezzarli a leggere; bisogna sorprendere la loro curiosità, attrarre la loro attenzione, allettare la loro mobilissima fantasia. Tale è il compito che si propone questa raccolta di storielle, riccamente illustrate a colori, amene nella forma, morali ed istruttive nella sostanza, che si raccomandano specialmente alle signore istitutrici delle Scuole elementari e dei Giardini d'Infanzia pi loro piccoli alunni d'ambo i sessi», *Catalogo generale dello stabilimento Perino*, cit., p. 38.

⁴⁷ Regarding these magazines see the detailed profiles in S. Marini, A. Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, Firenze, Franco Cesati editore, 2001. A programmatic thinking on the problems about the study of children's journals is J. Meda, *Per una storia della stampa periodica dell'infanzia e della gioventù tra '800 e '900*, in F. Loparco, *I bambini e la guerra. Il Corriere dei Piccoli e il primo Conflitto Mondiale (1915-1918)*, Firenze, Nerbini, 2011, pp. 7-25.

⁴⁸ «Il «Giornale Illustrato per i ragazzi» sarà una lieta promessa per i piccoli lettori italiani, una promessa di cose belle, buone e utili, che verrà scrupolosamente mantenuta, grazie all'attiva cooperazione dei migliori scrittori. Questo giornale diventerà l'eco fedele dei bimbi d'Italia, i quali troveranno in esso la desiderata distrazione dopo la scuola, nella lettura di piacevoli narrazioni ispiranti l'amore alla famiglia e la facile riconferma di quello che insegnano i maestri nella lettura degli articoli di storia, di scienza e di arte consiglianti l'amore allo studio» («Giornale illustrato per i ragazzi», n. I, 4 febbraio 1886).

The magazine, edited by Onorato Roux, started on the 4th February 1886 and changed its title at the beginning of 1888 becoming «Il Paradiso dei bambini» [Children's Heaven], preserving indeed the sequence numbering; then in 1895 began «La Ricreazione» [Recreation Time]. From 1890 the leadership passed to Epaminonda Provaglio, while Ernesto Peretto⁴⁹ was the head of the editorial staff. Changes in the heading design are very interesting: in the «Giornale» there are children that study, in the «Paradiso», very similar to «Giornale per i bambini» by Oblieght, there are angels that read, while for «La Ricreazione» the image is all-page, designed by Tavio (Ottavio Rodella), and is divided into two parts; in one children read all together and in the other there is a classroom with pupils and a teacher to emphasize the two purposes of the magazine: entertainment and education, presented as the diffusion of moral advice in addition to knowledge and ideas.

The journal published articles about history, science and art history, tales, fables, puzzles, riddles and contests with prizes; in a few issues are published also tales written by children themselves and proofread by Onorato Roux. Very well-known writers such as Edmondo De Amicis, Luigi Capuana and Matilde Serao⁵⁰ were collaborators and also the magazine published the first articles of the young debuting Grazia Deledda who published in 1888 her first tale *Sangue sardo* in «L'Ultima moda», a Perino magazine edited by Provaglio⁵¹. The publicity talks about a run of 30 thousand copies and a circulation also in Italian schools abroad, like Costantinopoli, Athens, Smyrna, Tunis, Tripoli, New York, Montevideo and Buenos Aires⁵².

⁴⁹ We do not know anything about Ernesto Peretto, in the National Library of Florence was preserved one letter, addressed to Angelo De Gubernatis, on a letterhead of Perino's printing house with a seal of «Ernesto Peretto, pubblicista in Roma». The name has arisen the curiosity of Grazia Deledda who asked, in a letter to Provaglio, if he was another Provaglio's pseudonym. G. Deledda, *Opere scelte*, ed. by E. De Michelis, Milano, Mondadori, 1964, p. 1058.

⁵⁰ In the magazine we can find often re-editions, adaptations and reductions of tales and articles by this famous writers who, probably, did not collaborate directly with the journal but gave non-original material. Moreover sometimes it is impossible to understand if authors knew of these adaptations of their articles because of the lack and defects of the copyright law during the decades after the Unification of Italy. See C. De Vecchis, P. Traniello, *La proprietà del pensiero. Il diritto d'autore dal Settecento a oggi*, Roma, Carocci, 2012 and M.I. Palazzolo, *La nascita del diritto d'autore. Concetti, interessi, controversie giudiziarie (1840-1941)*, Roma, Viella, 2013.

⁵¹ Deledda continued her collaboration writing articles for «L'Illustrazione per tutti» and «L'Ultima moda» and also publishing in 1891 the book *Fior di Sardegna* with a dedication to Contessa Elda di Montedoro, Provaglio's pseudonym. Regarding Provaglio and Deledda relationship see the letters in G. Deledda, *Opere scelte*, cit.

⁵² *Catalogo generale dello stabilimento Perino* cit., p. 7. We do not know if this information is real or a pure marketing idea, but it is true that Perino's editions are widespread in the world, if we have a quick look at library catalogues in the world. For example the New York Public Library has in its historical collection about 50 Perino editions, that is quite a large amount if we think of the total Perino production. Moreover the Bibliotheque Nationale de France has a big collection of publicity posters of Perino's books, now available on line on Gallica (<<http://gallica.bnf.fr/>>).

In the first issue of the new magazine «La Ricreazione» there is a long list of authors: Sylvia Albertoni, Clelia Bertilli Attili, Vincenzina De Felice Lancellotti, Grazia Deledda, Willy Dias, Maria Falsini, Elda di Montedoro, Emma Perodi, Enrico Balderi, Giuseppe Petrai, Prof. Francesco Pometti, Prof. Francesco Sabatini. The magazine, in its various changes of name, still keeps many similar characteristics. The role of illustrations is very meaningful, of which it makes wide use along with some small cartoons often accompanying articles⁵³. The impression is that the images are often not in direct relation with the text but have a purely ornamental function: if the story talks about two poor children, we find a portrait of two young boys with shabby clothes, if the tale talks about animals we see depicted a cat or a dog but rarely they are doing a specific action told in the episode⁵⁴. The reutilization of the same illustrations for different tales is proof of this evanescent relation between text and images. For example a portrait of two children dressed as peasants near a painting that shows them, firstly used for the tale by Giuseppe de' Rossi *Mariagrazia e Ciccantò*, published in Issue 14 (19th April 1885) of «L'Illustrazione per tutti», and afterwards used for a brief tale that appeared in the first edition (1st June 1890) of «La Domenica dei bambini». The same happens with the sketch representing the Adoration, published in the Issue of 5 January 1888 of «Il Paradiso dei bambini», firstly used for a New Year's Eve number of the «L'Illustrazione per tutti» in 1885⁵⁵.

However if we read the tales published in Perino's children's magazines we can easily understand how difficult they are especially from a linguistic and lexical point of view, so they are hardly readable by children on their own; instead probably parents or relatives read the articles and tales aloud. There are many invitations to mothers, in the editorial advertising, to buy and read to their children Perino's magazines and sometimes journals contained articles expressly dedicated to them: in the Issue of 3rd January 1895 of «La Ricreazione» we can find an article written by Ernesto Perfetto on diphtheria and its diffusion in Europe, another short article about the contagion of croup, a respiratory condition that is usually triggered by an acute viral infection frequently associated with diphtheria, and an article about a new sewing machine.

Perino used very aggressive modern commercial strategies for that time, the last page of every magazine being devoted to advertising and promotion of his new editions, sometimes linked with the editorial policy of the magazine such as the printing of a little dictionary or a collection of short lessons about Italian

⁵³ About printing procedures for illustrations see A. Gusmano, *Tecniche di stampa nel periodo liberty*, in *Tra fate e folletti. Il Liberty nell'editoria per l'infanzia 1898-1915*, Torino, Daniela Piazza editore, 1994, pp. 69-80.

⁵⁴ About the relationship text/image, in addition to Bacci, *Le illustrazioni in Italia tra Otto e Novecento*, cit., see also A. Faeti, *Guardare le figure. Gli illustratori italiani dei libri per l'infanzia*, Torino, Einaudi, 1972 and S. Assirelli, *Paradigma Bemporad. percorsi e linee evolutive dell'illustrazione nel libro per l'infanzia in Italia tra Otto e Novecento*, Firenze, Nerbini, 2012.

⁵⁵ See Palazzolo, Mori, Bacci, *Edoardo Perino. Un editore popolare*, cit. pp. 118-119.

history («La Riconoscenza», 3rd January 1895), but sometimes the advertising could be only for the adult editions, like the *Misteri*. At other times, instead, the advertising was inside the text and tales in the magazines and thus we can read a tale that speaks to a child who does not want to read but will do so thanks to the aunt who buys for her an illustrated alphabet to make the experience of reading a pleasant activity: obviously follows an indication of the possibility of acquiring the alphabet from the publishing house of the magazine⁵⁶.

Many of the tales and articles in the magazine rotate around the political editorial policy of Perino such as the importance of values and Risorgimental heroes through biographies of Mazzini and Garibaldi and tales of the main battles⁵⁷. There is also celebration of the Sabauda Monarchy from biographies of various members of the family and poems to celebrate anniversaries and marriages⁵⁸; there is no lack of support for colonialization with poems and songs, often 'written' directly by child readers⁵⁹. In the stories, often dramatic and sad, with themes showing respect for authority and parents, love for the fatherland and observance of religious precepts is joined a teaching of good sentiments that is explained above all with pity and charity towards those less fortunate⁶⁰. However the concept of charity is more often seen, in Perino's magazines, as total acceptance of class differences, so that alms are often a pure palliative for a condition of suffering for which there is no cure. The main characters in the stories are often middle class children who have to show good upbringing and good manners otherwise they are poor children with the misfortunes of their condition, often beaten or exploited by adults. The teaching methods are very often those of fear and cruelty; a child who does not behave well and gets into some trouble often pays dearly for his disobedience⁶¹.

Among the values for educating the young generation the sense of duty is of prime importance, that is to say the satisfaction that comes from awareness of having done the right thing. In many stories there is a lot of showing how to behave towards parents and siblings, teachers, adults in general, the fatherland

⁵⁶ «La Domenica dei bambini», n. 1, 1890, p. 1.

⁵⁷ *Per la morte di G. Mazzini*, «Giornale Illustrato per i ragazzi», I, n. 6, 11 marzo 1886; *La leggenda garibaldina*, «Giornale Illustrato per i ragazzi», vol. II, n. 21, 2 giugno 1887.

⁵⁸ *I nostri principi. Breve istoria dell'Augusta Casa di Savoia*, in 30 puntate a partire dal numero del 23 marzo 1891 de «Il Paradiso dei Bambini».

⁵⁹ It is not easy to know if the letters published are real. This question is not new among the scholars studying children's magazine, see S. Franchini, *Diventare grandi con il «Pioniere» (1950-1962). Politica, progetti di vita e identità di genere nella piccola posta di un giornalino di sinistra*, Firenze, Firenze University Press, 2006.

⁶⁰ On pedagogical objectives in children's literature see the classic M. Valeri, *Letteratura giovanile ed educazione*, Firenze, La nuova Italia, 1981. For an updated bibliography see *Percorsi della letteratura per l'infanzia: tra leggere e interpretare*, ed. by F. Bacchetti, Bologna, Clueb, 2013.

⁶¹ On pedagogy of fear, like the one in the well-known book *Pierino Porcospino* [Shockheaded Peter] by Heinrich Hoffmann (translated in Italian for the first time in 1882 and published by Hoepli in Milan) see S. Blezza Pincherle, *Libri, bambini, ragazzi: incontri tra educazione e letteratura*, Milano, Vita e Pensiero, 2005, pp. 9-16.

and finally towards themselves. A boy must get used to working constantly, so that idleness is condemned which leads to bad habits, whereas work is glorified as a source of growing up and spiritual improvement. In this context the poor children that work or the peasants become a narrative means aimed at the upbringing of the well-off middle class child who is bored and idle.

The «Paradiso dei bambini» had two Sunday supplements, that were in fact separate magazines, «La Domenica dei bambini» (1890) and «Il Tesoro dei bambini» (1893-1897), in eight pages, illustrated in colour, edited by Emma Perodi up to Number 40 in 1896, then by Erminia Bazzochi⁶². Among the permanent collaborators were: Ettore Giaquinto, the poet and playwright, Giulia Luini and Sofia Semach.

The «Tesoro» in Perodi's time had a different aim compared to that of Provaglio; you can see in fact the great use of colour which in other magazines for children was used only for special Numbers, to explain and amuse. There is a greater involvement of readers in magazines with competitions – for the most beautiful drawing, the best poem, the solution of a puzzle or riddles and there are also examples of prototypes of cartoons, vignettes with lines in rhymed couplets (a winning formula that would last for more than 50 years) like *Boccanera al circolo delle storie*, while the final page is always painting exercises. To the liveliness of the illustrations however there is a less light-hearted tone to tackle arguments of civil education with frequent references to the conditions of the poorest children.

Just as in «Il Paradiso dei bambini», the images are the result of the reusing or adapting. For example we find the illustrations that appeared in 1893 used again for similar stories in 1896. In the competitions and letters to the editor we almost always find Roman children, which is a sign that the magazines sold well in the city, but there were also children from other Italian regions.

Along with the fairy tale character of many of these stories presented there is also interest in tales of myths that would have great success 15 years later with Laura Orvieto and her *Storia delle storie del mondo*⁶³, along with the publication in instalments of the story of the Trojan War.

There are only few references to the present and politics, whereas in «La Ricreazione», even if it is in Number 13 of the 29th of March 1896 we find a poem called *Adua* by Giulio Calace, a quartermaster.

⁶² From Trieste Bazzochi was a writer specialized in crime stories and anticlerical stories rather than children's literature. See R. Curci, G. Ziani, *Bianco, rosa e verde: scrittrici a Trieste fra '800 e '900*, Trieste, Lint, 1993.

⁶³ L. Orvieto, *Storia delle storie del mondo. Greche e romane*, Firenze, Bemporad, 1911. For a complete bibliography see the proceedings *Laura Orvieto. La voglia di raccontare le 'Storie del mondo'*, «Antologia Vieusseux», n. 53-54, maggio-dicembre 2012.

Whereas there are many stories taken from books by Perodi herself, published by Perino, or some other writer like Provaglio or Ida Baccini⁶⁴. In Number 6 of the 11th of February 1894, for example, Perodi writes:

A family of cats. The title I have written at the top of this article comes from Ida Baccini's very enjoyable book where I don't know if it is more the cleverness of the form or the richness of her imagination that attract me. I advise you children to read that book of my very dear friend because you will learn, amusing yourself, so many beautiful things. In the meantime here below I'm publishing a chapter from it, being sure of giving you pleasure⁶⁵.

Besides the stories there are also short scientific articles often linked to new technology and inventions⁶⁶.

The teaching framework of Perodi's *Tesoro* however remains within the field of Perino's magazines and in general in those dedicated to the children of the period, while sometimes adding feelings that come from the deepest of Christian faith and less so in the stories of «La Ricreazione»⁶⁷. The same traditional viewpoint is expressed with regard to women and especially future women. In Number 2 of January 1893 of «*Tesoro*» are reproduced a series of vignettes, entitled *Gusti diversi*, representing a female child doing domestic chores. The images are followed by this caption:

There are some children who would like only to do the cooking, others to tidy the house and dust, others to be school teachers to teach a group of children, some disciplined others not. These are the children that when bigger will be able to run the family and make themselves obeyed by their own children. I'm not talking about those that spoil or dirty things setting a bad example to their siblings; those will not be of use either to themselves or to others and they will all be disliked. They will be very unhappy but it is their own fault⁶⁸.

⁶⁴ See Boero, De Luca, *La letteratura per l'infanzia*, cit., pp. 29-30 and *Storie di donne: contessa Lara, Anna Vertua Gentile, Ida Baccini, Jolanda. Scrittura per l'infanzia e letteratura popolare fra Otto e Novecento*, ed. by P. Boero, Genova, Brigati, 2002.

⁶⁵ «Una famiglia di gatti. Il titolo che ho scritto in cima a quest'articolo, lo ha dato Ida Baccini, a un suo dilettevolissimo libro, in cui non so se sia maggiore la spigliatezza della forma o la ricchezza dell'immaginazione. Io vi consiglio, bambini, di leggere quel libro della mia carissima amica dal quale imparerete, divertendovi, tante belle cose. Intanto qui sotto ne pubblico un capitolo, sicura di farvi un piacere». The Baccini's novel was just published by Paravia in Turin.

⁶⁶ For example this is an article dedicated to petroleum: *Una flotta dispensatrice di luce*, «*Il Tesoro dei bambini*», n. 3, 15 gennaio 1893, pp. 2-3.

⁶⁷ See Marini, Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, cit., pp. 44-47.

⁶⁸ «Ci sono certe bimbe che non farebbero se non che cucinare pietanze, altre che mettere in ordine la casa e spolverare, altre che far le maestre di scuola ed educare una turba di piccini più o meno disciplinati. Queste sono le bambine, che da grandi sapranno guidare la famiglia e farsi ubbidire dai figli. Di quelle invece che sciupano, insudiciano, danno il cattivo esempio ai fratelli non parlo; esse non saranno utili né a sé né a gli altri e tutti le avranno in uggia. Saranno molto infelici, ma per colpa propria», *Gusti diversi*, «*Il Tesoro dei bambini*», n. 2, 8 gennaio 1893, pp. 2-3.

The aim of the upbringing of children is mainly preparation for their future role of wives and mothers and therefore the regular feature entitled *Corriere delle giovinette* that for a certain period appeared on the pages of «La Ricreazione» adds articles about domestic work, fashion, knitting and other similar female tasks.

Magazines for children were not only of a generalized nature and in fact in 1886 Perino gave Francesco Sabatini the editing of «Giornale illustrato di storia naturale» which lasted only two years but led to the publication of the volume *Storia naturale narrata ai fanciulli* (1893), with coloured illustrations and, following the intentions of the author, was to contain not only:

scientific news about animals, plants and minerals, all of them little anecdotes that refer to successful hunting and fishing adventures or the very life of plants and flowers and their mystical languages⁶⁹.

One year earlier, in 1892, instead was published *Storia d'Italia narrata ai fanciulli* edited by Adolfo Mancini with illustrations by Silvio Guastalla which emphasized Perino's commitment to promoting patriotic themes. Another special initiative for children was «Folletto dei bambini» (1889), a kind of album in colour absolutely new in Italy with vignettes in six colours together with captions selling for less than 5 cents and brought out every two weeks. It was a question of a single big sheet to be folded in two whose internal face contained a series of strip vignettes of varying number. As the publisher emphasized in the presentation, the publication could be used as a painting⁷⁰. Although, according to the title, it was aimed at an exclusively young public the magazine seemed to be of a more general character. There were satirical and amusing cartoon strips, on the model of Wilhem Busch⁷¹, where the laugh often comes from tragedies and grotesque misadventures by the main characters who not only a children, but often adults addicted to vice and alcohol⁷².

The Perino's magazine, also those for children, are characterized by an excessive use of publicity, but we can see inside «Tesoro» that books and magazines for adults are advertised, a sign that probably the magazine was paged through and read under the supervision of adults. However it was read

⁶⁹ «[...] notizie scientifiche intorno agli animali, le piante ed i minerali, tutti quegli aneddoti che si riferiscono alle fortunate avventure della caccia e della pesca, che riguardano la svariata vita delle piante, dei fiori e il mistico loro linguaggio» (*Storia naturale illustrata spiegata ai fanciulli. Manifesto*, Roma, Perino, 1893).

⁷⁰ See the advertising in «Il Rugantino», 5 marzo 1889.

⁷¹ Busch was a German humorist, poet, illustrator and painter. He published comic illustrated cautionary tales from 1859, achieving his most notable works in the 1870s. He is well known mostly for the story in verse of Max and Moritz, a terrible duo of brothers. W. Busch, *Max e Moritz ovvero Pippo e Peppo*, Milano, Rizzoli, 1974.

⁷² Alessandrina Library in Rome digitized all the collection it has of the «Folletto dei bambini» available at <<http://digitale.alessandrina.it/>> (last access: July 18th, 2014).

also by older people. This is a famous example of the double role of magazines both read and written by Deledda, the young adolescent, who had already shown writing ability, did not disdain to take part in quizzes and word-puzzles proposed by magazines and to send them letters under a pseudonym which is a sign not only of the ambiguity that dominated that adolescent period of her life between childhood and adulthood, but which emphasizes how wrong it is to restrict the reading of the young to a single literary genre. As Davide Montino has rightly emphasized:

Young readers choose when and where they can among books that are available to them. They mix high and low types, learned and popular writers, text written for adults and those for children, thus giving an outlet to their own ability to make choices between titles and writers⁷³.

The same Deledda will recall in her autobiographical novel *Cosima* the impact that the publications by the Roman publisher had on her formation as a reader and writer:

The fact is that, then in the capital, after the aristocratic publisher Sommaruga, was promoted from being typographer, a popular publisher who, among many publications of bad taste, had some good ones and knew how to distribute in more distant towns in the peninsula. They even arrived there in Cosima's house. There were magazines for children, clever and well illustrated, and those of a general nature and fashion⁷⁴.

To study closely the role, influence and diffusion that Perino's magazines dedicated to children in the country during the period of Umberto I can certainly contribute to an analysis of the methods of educating the youth of the end of the XIX century and what is being presented is only a first step in this direction.

⁷³ «I giovani lettori, infatti, pescano dove e quando possono tra i libri che sono a loro disposizione: mescolano generi alti e bassi, autori colti e popolari, testi scritti per adulti e testi per l'infanzia, dando così sfogo alla propria capacità di creare percorsi tra titoli e scrittori». D. Montino, *Libri e giovani lettori tra XIX e XX secolo: un percorso di tipo qualitativo*, «History of Education & Children's Literature», vol. II, n. 1, 2007, p. 322.

⁷⁴ «[...] il fatto è che allora, nella capitale, dopo l'aristocratico editore Sommaruga, era venuto su, da operaio tipografo, un editore popolare che fra molte pubblicazioni di cattivo gusto ne aveva di buone, quasi di fini, e sapeva divulgarle anche nei paesi più lontani della penisola. Arrivavano anche laggiù, nella casa di Cosima; era giornali per ragazzi, riviste agili e bene figurate, giornali di varietà e di moda». G. Deledda, *Cosima*, in Ead., *Opere scelte*, Milano, Mondadori, 1964, p. 909.

«Boys of England», «The Boy's Own Paper», and the English influence in the Italian «Giornale per i Bambini»*

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ABSTRACT: The History of English and Italian children's periodical press during the late 19th century can be an important means to understand National educational processes. According with the simultaneous development of the Italian and the English educational and school systems, the children's periodicals took an important part in the educational project and their aim was to educate the young readers through well-defined messages. In Italy the most important example was offered by the «Giornale per i Bambini» that not only educated the young Italian readers, but also offered various articles and pictures to entertain children in a pleasant way. To assure its success, this periodical took inspiration from European periodicals and, in particular, from the children's periodicals published in Great Britain «Boys of England» and «The Boy's Own Paper». It is, so, possible to discover the existence of an «English way» that inspired the «Giornale per i Bambini».

EET/TEE KEYWORDS: Periodical; Illustrated Paper; Children's Book; Publishing Industry; Italy; United Kingdom; XIX Century.

1. *English and Italian children's periodicals and their educational context*

The aim of this paper is to investigate the possible cultural impact of English magazines on the most important Italian children's periodical, «Giornale per i Bambini».

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Comparing the «Giornale» to the English children's magazines, «Boys of England» and «The Boy's Own Paper», I will explore and analyse the common educational messages directed and transmitted toward children of the late 19th century. I will argue that these English periodicals made the «Giornale» a more European rather than Italian magazine.

To frame the birth of the Italian paper, I will first investigate the historical context following Italian Unification in 1861. When Italy ended its unification process, «making the Italian» became the new elites' imperative. Working to overcome the country's demographic plurality in light of its people's cultural, political, and regional differences, the Italian intelligentsia attempted to promote the spirit of a united Italy. Identifying children as integral to this process of nation-building, they required that the former be educated according to the new condition of Italian citizens. This patriotic project of civic, moral, and social instruction found its origins in the Italian classroom.

In the second half of the 19th century, several primary schools developed programmes according to the guidelines specified by the Casati (1859) and the Coppino Law (1879): the school – compulsory, free, and laic – became the cultural centre educating children on how «to be Italian»¹. «Making the Italian» meant unifying the people and setting shared values for the advancement of the country's national, social, and civic life. This sense of national belonging defined the new «Italian attitude».

The development of the scholastic system after Italian Unification was an important aspect of this project. In about thirty years, the school system reduced the illiteracy rate², spread the use of the Italian language among the popular classes, put a growing number of people in touch with the Italian culture, increased the teaching faculty, and educated the new citizens of the Kingdom according to the moral and civil values of the new Nation.

To educate pupils according to the new «Italian attitude», school textbooks presented stories with a strong call to God, the Homeland, the King and Italian history. The same textbook publishing companies began to issue new children's periodicals that would contribute to this educational project. The messages were similar to the ones in the schoolbooks. Their aim was to educate readers by tales and stories with pedagogical intent. There were no prizes, games, or sections that would encourage a child's idle imagination. Rather, illustrations encompassed didactic tones and, hence, provided fewer avenues of distraction for children, who could engage with the objectives of the editorial office³.

¹ D. Bertoni Jovine, *Storia della didattica dalla legge Casati ad oggi*, Voll. I-II, Roma, Editori Riuniti, 1976, pp. 173-191.

² In 1861 the illiteracy rate was 78%, in 1881 was 67.27%. See G. Genovesi, *Storia della scuola in Italia dal Settecento a oggi*, Roma-Bari, Laterza, 2004, p. 246.

³ Id., *La stampa periodica per ragazzi. Da Cuore a Charlie Brown*, Parma, Guanda, 1972, pp. 15-20.

Published for the first time in 1881, «Il Giornale per i Bambini» revolutionized the Italian newspaper industry. Directed by Ferdinando Martini, its purpose was to educate young Italian readers by means of its various entertaining articles and pictures. Compared to others, this periodical comprised a «break element» as it offered stories that were less didactic and, thus, appealed more closely to children's imagination and sense of play. The «Giornale» refused the Italian model and took inspiration from European periodicals. In a letter addressing Ferdinando Martini dated October 21, 1880, Guido Biagi writes:

Dear Mr. Martini,

[...] please, keep in mind the news concerning the «Giornale per i Bambini». At 5 [p.m.] I'll bring you the list of foreign magazines for Oblieght⁴.

While from these letters we are not able to trace the name of the periodicals that inspired Biagi and Martini at the start of their publishing project, a series of elements helps us understand how much of an influence the English periodical model would have in shaping the characteristic features of the «Giornale per i Bambini».

Two particular reasons allow us to focus on Great Britain as our basis for this comparison.

First, England's magazine demographic presents interesting analogies with Italy's. Impressive industrial progression giving way to an increase in the poverty rate, urban degradation and child labour exploitation characterized the Victorian Era. To prevent social conflicts, the English State began a series of reforms to alleviate proletarian conditions of life and labour. With respect to its youth, the Elementary Education Act (commonly known as Forster's Act) of 1870 proved the most notable: it became the means by which the government could eradicate the Anglican church's monopolistic control of primary schools and establish school boards⁵.

The commitment to secularizing the school curriculum and increasing children's literacy rates encompasses one of the analogies that can link the Italian Casati and Coppino Laws to the English Education Act. These laws were very different in form and content in light of the civic and political diversity within the two nations. Nevertheless, all three considered the school as a useful tool in shaping children's education. The school had not only to inculcate useful and necessary notions, but also to mould children according to the principles and precepts of society. While England sought to reconstruct the social rift created after the industrial revolution, Italy aimed at educating its youth according «to the Italian attitude».

⁴ Letter from Guido Biagi to Ferdinando Martini dated October 21, 1880, in National Central Library of Florence (from here NCLF), Fondo «Ferdinando Martini», fasc. 4, b. 3.

⁵ On the school boards: W.B. Stephens, *Education in Britain 1750-1914*, Basingstoke, Palgrave Macmillan, 1998.

Secondly, numerous English children's periodicals strived to educate its youngsters according to the new ethical and social values advocated by Victorian society.

Thanks to their simple language, large typography, and elaborate images, several of these papers quickly amassed a substantial audience of young readers, who found the delightful and interesting stories easy to read and pleasant to follow. The magazines began to flourish particularly in light of three factors in the 1860's: tax repeals on advertising (1853), paper (1861), and stamps (1855); a decrease in the production and transportation costs of periodicals; and technological advancements that allowed for new and efficient printing machines. These above factors significantly lowered the costs of newspapers, (deemed penny periodicals), making them more affordable and accessible to a much wider audience. Lower costs gave not only middle and upper class but also working class children the possibility to purchase the magazines that the Education Act had aimed at disseminating to the reading public⁶. Among these low cost periodicals, the most important were the «Boys of England» and «The Boy's Own Paper», founded in 1866 and 1879, respectively.

Listed at the price of a penny, «Boys of England» began as a weekly magazine, addressed to the literate public of the 1870 Education Act. Within five years, the circulation of this journal had risen to nearly 250,000 copies. Founded by the Religious Tract Society, «The Boy's Own Paper» presented school and adventure stories. Supporting the nation, large spaces within each page regularly demonstrated the imperialistic conquests of Great Britain.

Martini and his collaborators were inspired by the editorial success of these children's periodicals; they decided to use the same English model to ensure the «Giornale»'s influence over the Italian public and secure remarkable financial success. Messages in line with building the nation according to the «Italian attitude» were adapted to the educational and formative needs of Italian children. This educational objective made the «Giornale» a magazine that addressed both males and females between the ages of 6 and 12; and the light tone of the stories and images made the periodical suitable for all children. As none of its pages demonstrated any gender bias, the paper hence complied with the school system's policy to educate both boys and girls equally.

As their titles suggest, «Boys of England» and «The Boy's Own Paper», in contrast, specifically addressed a young male demographic with the intent of rearing the English Gentleman and maintaining the school system's strict separation between the sexes. Although the director of «The Boy's Own Paper» had stated that «[the magazine] is as much a favourite with girls as with boys, and [that] there is nothing in its pages to prevent it being used in girls' school

⁶ R.D. Altick, *The English Common Reader. A Social History of the Mass Reading Public: 1800-1900*, Chicago, University of Chicago Press, 1957, pp. 318-364.

in any grade of life»⁷, it was evident that the messages and tone used in the published stories could not relate to a female audience. For this reason, the Religious Tract Society simultaneously founded «The Girl's Own Paper» in 1880 for young British girls.

Before analyzing the English children's periodicals, it is useful to describe why and when the *Giornale* began its publication. By means of its lead editorials, Martini clarified the aims of the magazine as well as its European and international outlook.

2. *The first issue of the «Giornale per i Bambini», the lead editorial and its educational program*

The first issue of the «Giornale per i Bambini» was published in Rome on July 7, 1881. The sixteen-page magazine, measuring at 30x21 cm, had management and administrative offices located at 130 Montecitorio Square, in Rome. The new weekly publication was significantly funded by the rich financier Ernesto Emanuele Oblieght who recognized the wide revenues that could be earned by the publication of a periodical in the expanding sector of the Italian children's press. He decided to use part of his capital for the foundation of a new magazine and committed it under Ferdinando Martini's direction.

Martini was a versatile and eclectic personality and left an important mark in the cultural and political mood of his time⁸. He was a novelist, a man of theatre, a critic, a poet, a journalist, an editor of various political and humour magazines, a teacher, a member of the Parliament of the Kingdom of Italy, an undersecretary in the Public Education Ministry, Minister of Public Education between 1892 and 1893 and Minister of the Colonies between 1915 and 1916.

Martini's appointment was not casual: he was best known by the Italian reading public for his collaborative work with the daily political publication «Fanfulla» (since 1872) and for his direction of the literary paper «Fanfulla della Domenica» (since 1879)⁹. Oblieght owned both magazines and used Martini's notoriety among the Italian public to garner success for the new «Giornale». Martini was further aware that being the director of the new magazine would have ensured the favour of not only his young audience, but also the adult «audience-buyers». In fact, this adult audience corresponded, in large part, to the subscribers of the «Fanfulla» and «Fanfulla della Domenica».

⁷ *Correspondence*, «The Boy's Own Paper», vol. I, n. 15, April 26, 1879, p. 240.

⁸ R. Romanelli, *Martini Ferdinando*, in *Dizionario Biografico degli Italiani*, Roma, Istituto dell'Enciclopedia Italiana, Vol. 71, 2008, pp. 216-223.

⁹ *Ibid.*, p. 217.

In addition to these economic reasons, the «Giornale» was brought about with the goal to educate the Italian youth of the new Kingdom, strengthen their attachment to their homeland and family, ensure civil and industrial progress, and help the consolidation of the new Italian state. The «Giornale per i Bambini» became a tool to build the new Italian in the post-unification period¹⁰. To «make Italians», the magazine preserved the educational project through the stories and illustrations created by expert writers and illustrators¹¹. Love of country, devotion to the King and the family, respect of hierarchy, strictness and obedience are some of the topics proposed in the stories, which supplemented the ethical, moral and civic instruction received at school. The «Giornale» asked children to use both intellect and heart to radically turn the rising generation into new Italian citizens.

Published in the first issue, Martini's training project in the lead editorial titled *Come andò...* highlighted all the elements that constituted the magazine's distinctive features.

The story: a group of children, consisting of both males and females, bored of playing blind man's buff, decided to go to the garden to read. Carlo – the eldest who had just completed the fourth grade – had a book describing the story of Spurious Cassio; his fellow readers were younger and did not know who Cassio was. Understanding neither the content nor the vocabulary of the story, the younger children sharply refused Carlo's book and left to read the short story books best suited to their age. Despite the ease of reading their storybooks, however, the younger children soon found themselves bored once again. Indeed, they knew these stories well, and the frustration caused by the failed pleasure to read made them lament their inability to comprehend their elder brother's text. Privy to their quarrel, the boys' father asked them what had happened. Immediately his children recounted the wonderful articles they had read in an American journal owned by some girls they had met on a vacation:

There were so many pictures and so many things to read - said the kids: in a page there was a story and in another one a story about what certain animals did and in another one something about history [...] and the lives of famous children [...] and many nice poems to learn by heart [...] and a description of certain factories where they make furniture, needles [...] and many trips to Africa, Asia [...] there was even the puppet theatre¹².

All together, the young children asked their father to buy that sort of magazine instead of their usual books. Yet, their father had no choice but to refuse, as no such publication existed in Italy. For this lack, he could not give a reason:

¹⁰ E. Marescotti, *Educazione, istruzione e diletto: il «Giornale per i Bambini» di Ferdinando Martini*, in G. Genovesi (ed.), *Formazione nell'Italia unita: strumenti, propaganda e miti*, Milano, Franco Angeli, Vol. III, 2002, p. 68.

¹¹ About the most important Italian illustrators: A. Faeti, *La letteratura per l'infanzia*, Scandicci, La Nuova Italia, 1977.

¹² *Come andò...*, «Giornale per i Bambini», vol. I, n. 1, July 7, 1881, p. 1.

Why can't we find it here? Why do they not publish it? [...] Why do they make them for children in America, England, and France, but not in Italy?¹³

After so many questions, the father – who happened to be Martini – decided that it was necessary to do in Italy what had already been done elsewhere, and with this purpose the «Giornale per i Bambini» was born. According to this editorial, numerous reasons account for the publication of the new magazine. The first was to provide young Italians with a paper that could compete with its foreign counterpart and fill the gap in Italian publishing. The editors wanted to meet the demands of the children of the new-born kingdom by providing the following: fresh and amusing stories and novels with original and interesting plotlines; tales that kept their attention and enhanced memory through the use of plain language – understandable by everyone and, yet, never boring; illustrations and pictures that not only accompanied the text, but also became part of the story. The topics covered in the various sections were meant to inform children on subjects ranging from science to literature and furnish as much information as possible while amusing them simultaneously.

The public to which the magazine was addressed included both male and female elementary school children. The relatively high cost of the publication (25 cents per issue, 12 lire per annual subscription, equivalent to £ 40 in today's currency) resonated well with upper class Italian children.

The expanding generation of young Italians required readings that could supplement their school texts and prove useful to their formation as future citizens of the kingdom. Martini and Oblieght did not impose this desire for new reading material. Rather, they followed and captured market trends. Many letters addressed to the editorial office, in fact, evince the number of readers, who subscribed to foreign magazines¹⁴. Expressing joy, the authors of these letters welcomed the publication of the «Giornale», as they had never subscribed to such an Italian magazine before¹⁵.

With its first issue, the paper expressed the necessity to educate young people according to Italy's religious, familial, and civic values: its pedagogy was founded upon kindness, charity and piety towards the less fortunate, filial obedience, the spirit of sacrifice, and the love for the homeland. In addition to promoting a sense of openness and innovation, the publication allowed children to better understand national and international developments as well as industrial competition. Many foreign children's periodicals presented stories about unknown cultures and peoples and described countries as fair. By means of such stories, English magazines, for instance, taught readers about the British

¹³ *Ibid.*

¹⁴ *La Posta dei bambini*, «Giornale per i Bambini», vol. I, n. 3, July 21, 1881, p. 47.

¹⁵ «I'm very happy that in Italy we now have a children's magazine like the children of other foreign Nations», *La Posta dei bambini*, «Giornale per i Bambini», a. I, n. 17, October 27, 1881, p. 271.

Empire. In Italy, the «Giornale» taught children to consider foreign countries in terms of their industrial progress. Many articles, indeed, focused not only on foreign cultures, but also the railway, postal service, and the telegraph¹⁶.

To inspire openness, Martini and his faithful collaborator Guido Biagi¹⁷ decided to model the editorial techniques of the «Giornale» after that employed in the publication of European children's periodicals: this choice allowed them to found the most important Italian periodical of that time.

Biagi was the first who understood the importance of giving children well-illustrated literature that could make learning fun. His modern approach to the Italian children's periodical was influenced by those issued in America and Europe. An expert in the field, Biagi had published books in the English language and had contributed to the British periodical «Athenaeum». When Oblieght and Martini asked Biagi to show them examples of foreign children's periodicals, Biagi relied on his deep knowledge of the English editorial world to identify and reproduce the most relevant and innovative aspects in the «Giornale». Before laying out these attributes in the «Giornale per i Bambini», I will first investigate the features of English children's periodicals and take a look at the «Boys of England» and «The Boy's Own Paper».

3. «Boys of England» and «The Boy's Own Paper» as models of inspiration for the «Giornale per i Bambini»

When Biagi and Martini decided to publish the «Giornale», they took into consideration the structure of the magazines published abroad in America, France, and Great Britain. As previously mentioned, the «Giornale» was primarily inspired by the English periodicals thanks to Biagi's former editorial experience.

By the second half of the 19th century, many penny periodicals in Great Britain grew popular among children and became a model for procuring a large consensus of the young public.

¹⁶ S. Marini, A. Raffaelli, *Riviste per l'infanzia fra '800 e '900 dai fondi della Biblioteca Alessandrina*, Firenze, Franco Cesati, 2001, p. 27.

¹⁷ Guido Biagi (1855-1925) was a writer, journalist and librarian. As a journalist, he worked at the «Fanfulla della Domenica», the «Giornale per i Bambini», the «Athenaeum» in London, the «Rassegna Settimanale», the «Fracassa», the «Corriere della Sera», the «Don Chisciotte» and at the «Nuova Antologia». In 1879, he met Martini and became one of his closest collaborators. Martini supporting him not only in his work as a journalist but also, later, as the Minister of Public Education. Biagi elected Martini as his chief of staff when appointed as Secretary General (1884 to 1885) and when appointed as Minister (1892-93). On him: Fasano, *Biagi Guido*, in *Dizionario Biografico degli Italiani*, cit., Vol. 9, 1967, pp. 826-827.

The first and most important example is «Boys of England: A Magazine of Sports, Sensation, Fun and Instruction». First published in London on November 24, 1866, the magazine's first director was Charles Stevens¹⁸, followed by Edwin J. Brett¹⁹, a member of the Chartist movement²⁰. Brett remained the director until his death in 1895; and the magazine ceased publication in 1899. The editor was Kelly and Company, and the press was assigned to the Newsagents' Publishing Company for a few issues before being acquired by Brett's «Boys of England» office. Its magazine title emphasized its «[dedication] to readers of all classes in the United Kingdom»²¹. Referring not only to young but also «adult-consumers» in 1867, Brett, in fact, attributed the rapid success of «Boys of England» to parents and children. He points out:

If our labours, anxieties, and thoughts have been great our reward has been commensurate, for not only have the brave Boys of England, Ireland, Scotland and Wales stood firm around us, but The Parents have smiled approval on our efforts to amuse and instruct. It was something to gain over to our cause the Boys themselves, but our triumph was doubled where we gained the warm approbation of the anxious Fathers and Mothers of our countless readers²².

Each sixteen-page issue consisted of stories, news, games, prizes, and correspondences alongside elaborate and elegant black and white images designed by anonymous artists. Priced at a penny per issue, the magazine was accessible to underprivileged children. The publication, hence, was not a

¹⁸ Charles Stevens (1839-1897?) was one of the first British writers of his time to devote himself exclusively to children's literature. After briefly directing «Boys of England» in 1866, he continued to publish adventurous tales for children in such other periodicals as «Young Gentlemen of Britain», «The Young Briton», «Sons of Britannia», «Young Ladies of Great Britain», «The Gentleman's Journal», «The Rover's Log» and «The Boys' Herald». Although an established writer, Stevens was unable to successfully manage the various periodicals he established: after leaving «Boys of England», he founded the short eight-issue «The Empire» in 1867; in 1868, he launched «Boys' Book of Romance» which failed after twenty-four numbers. On him: R. Rollington, *A Brief History of Boys' Journals*, Leicester, H. Simpson, 1913, p. 68.

¹⁹ Edwin J. Brett (1828-1895) was a writer and journalist. An idealist, he was politically active in the political movement of Chartism. Though the movement died in 1848, Brett remained faithful to his radical ideas and continued to support the cause of the working class. In addition to «Boys of England», Brett also launched «Young Men of Great Britain», «Boy's Favourite», «Rovers of the Sea», «Our Boys' Journal», «Boys' Sunday Reader», «Boys' Weekly Reader», «Boys of the British Empire», «Boys' Comic Journal», «Jack Harkaway's Journal for Boys». On him: C.M. Banham, *Brett Edwin J.*, in L. Brake, M. Demoor (edd.), *Dictionary of Nineteenth-century Journalism in Great Britain and Ireland*, Gent, Academia Press, 2009, p. 74.

²⁰ This movement, fuelled mainly by members of the working-class, promoted a series of petitions and protests across the UK for a constitutional reform to guarantee suffrage to all male citizens of the kingdom above twenty-one years of age without distinction of wealth. The petitions were, nevertheless, rejected by parliament causing a series of demonstrations, the most impressive of which occurred in 1848 and marked the defeat of the movement.

²¹ *Correspondence*, «Boys of England», vol. I, n. 2, December 4, 1866, p. 32.

²² *Preface in the Second Volume of the "Boys of England"*, «Boys of England», vol. II, November (no number), 1867, p. 1.

mere expression of the ruling class and managed to endear a large working class demographic. The number of copies sold weekly in its first year (about 150,000 copies) was relatively high and was expected to increase to 250,000 in the 1870's²³. Writing about readers' «voracity» for the magazine in 1913, Ralph Rollington said: «When “Boys of England” first made its appearance in 1866, it went with such a rush that it was difficult for newsagents to get their supplies»²⁴.

«Boys of England» appeared with a subtitle, «A Magazine of Sports, Sensation, Fun and Instruction»²⁵ that conveyed the innovative mission it wished to establish. As its subtitle suggests, it sought to inform children about various sports; amuse with sensational and amazing stories; and finally, educate. Instructing by means of entertainment helps us understand the extent to which the magazine aimed at becoming a useful tool for the moral and ethical schooling of young Englishmen. Here, it focused on providing stories that could surprise the reader through rich plotlines and numerous images.

Illustrations occupy a central role in the magazine. Marking each issue, tragic images measuring at half a page convey the poignant themes proposed by each accompanying story.

The most well-known artists who collaborated with «Boys of England» included Dickens' illustrator Hablot Knight Browne – better known as «Phiz» – Robert Prowse, Charles H. Bennett, and John Proctor.

Defining the spirit that distinguished the magazine publishers in an editorial titled, *The Editor's Address*, Stevens invited young people to take out a subscription to the new magazine and said:

Our aim is to enthrall you by wild and wonderful, but healthy fiction; to amuse and instruct you by interesting papers on History and Science; to inform you on all matters belonging to your manly out-door sports and games, and your home pastimes; to enter into a hearty, free and trusty companionship with you through the medium of the Correspondence Pages; to afford you a merry laugh by a droll story or jest; to charm you with a pretty verse. In short, our aim mainly is to delight you²⁶.

Through the director's language, the importance assigned to stories with adventurous and amazing subjects emerges preponderantly. In addition to offering fictional and non-fictional stories on subjects of history, geography, sports, and literature, the paper welcomed correspondence between readers and magazine editors in an effort to promote friendship.

²³ C.M. Banham, *Boys of England and Edwin J. Brett, 1866-99*, Ph.D. diss., University of Leeds – School of History, 2006, p. 1.

²⁴ Rollington, *A Brief History of Boys' Journals*, cit., p. 28.

²⁵ From the second year, the periodical changed the subtitle in *A Young Gentleman's Journal of Sport, Sensation, Fun and Instruction*.

²⁶ *The Editor's Address*, «Boys of England», vol. I, n. 1, November 24, 1866, p. 16.

To offer children reading material that would please them as much as possible, Stevens asked them to send requests, comments, and suggestions to the editorial staff editor. He stated:

We wish you to receive this Journal as one intended expressly for your *amusement*; and it gives us great satisfaction to imagine you returning from school, from the office, the work-room, or the shop, and taking up your weekly number of the «Boys» to soothe and enliven your «care-tired thoughts»²⁷.

Clearly identifying their reference target, the magazine addressed not only students but also children employed in factories and shops. All the boys, without distinction of social class, were reminded:

You are intelligent beings, born in this age of advanced progress, and that even your amusements should be rational and in good taste. Read carefully, select and retain all that is worth remembering, criticise the work, communicate boldly and candidly your opinions of it, and send us your poems, tales, essays, and other productions of your pens. Boys of England, in these days of cheap education, cheap standard literature, of cadet volunteer corps, cricket-clubs, and gymnasia; in these days when even with unaided self-help and perseverance, you may achieve such wonders, it is your own fault if you do not grow up wise and strong men. [...] face hard study and face hard hand-labour²⁸.

In the «Boys of England», progress went hand in hand with the notion of self-help. According to Stevens, each child could strive for improving his condition and achieving his goals through will and perseverance. Social identity was not an obstacle but, rather, an incentive for children to improve their social state. According to the director, children could follow the example of characters that came from poor families and yet were famous for their services to the country:

Remember, Bunyan, the author of *Pilgrim's Progress*, was the son of a travelling tinker, and for many years worked at this trade; Telford, the designer of the Menai Bridge, was first a shepherd boy; Ferguson, the great astronomer, the son of a labouring man in Scotland; Burns, the true poet, a ploughman; George Stephenson, a cow-boy on two pence per day wages; Captain Cook, the son of an agricultural labourer; Milton, the immortal, the son of a small scrivener; Columbus, a sailor of humble birth, – with these bright examples before you, brave boys, let your motto ever be, «Excelsior!» onwards and upwards!²⁹

In accordance with Stevens' editorial, the front-page story, *Alone the Pirate's Lair*, promised and offered daring exploits of pirates, allowing readers to immediately grasp the exotic and adventurous spirit animating this periodical from its very first issue³⁰.

²⁷ *Ibid.*

²⁸ *Ibid.*

²⁹ *Ibid.*

³⁰ *Alone in the pirate's lair*, «Boys of England», vol. I, n. 1, November 24, 1866, pp. 1-3.



Pic. 1. *A ghost story*, «Boys of England», vol. VII, n. 161, Christmas number, 1870, p. 9 (Photography by the Author; courtesy British Library).

Other writers who appeared on that first issue included St. John Vane, Cecil John Stagg, and George M.F. Glenny³¹.

The different stories recommended to children aimed, above all, at entertaining. Under the leadership of Brett – a writer of juvenile literature well known for his gothic and macabre stories³² – the magazine continued its goal to reserve wide space to adventure and mystery stories. Various stories of betrayal and crime kept attracting thousands of children eager to discover, episode by episode, the evolution of the events narrated.

³¹ Vane St. John, in particular, was the son of James Augustus St. John, former editor of the radical newspaper «The Republican». Many of the collaborators of «Boys of England» had already written for other periodicals such as «The London Journal», «Reynolds' Miscellany», «The London Reader», «The Parlour Journal», «The Penny Miscellany», which belonged to the genre of cheap popular press.

³² Before managing «Boys of England», Brett had directed «The Boy Brigand or the Dark King of the Mountains» (1865-66), «The Skeleton Horseman or the Shadow of Death» (1865-66) and «The Wild Boys of London or the Children of Night» (1866).

These fantastic tales stood apart from their English competitors, which were academic and non secular in tone. While focusing, for the most part, on presenting stories of history or adventure, «Boys of England» also included tales of horror, ghosts and paranormal phenomena.

Comprising stories of sensation, the magazine offered a miscellany of school life stories and poems as well as a column titled *Progress of the British Boys* that traced the historical, civil and economic development of the Nation³³. As the editorial notes, the last page of the magazine offered readers' correspondence.

One very significant weekly section titled, *Our Sporting Page* (changed in the second volume to *Our Page of British Sports*³⁴) discussed the history, rules and most interesting anecdotes of the most popular sports in the United Kingdom. Following its first issue on boating³⁵, articles about skating, fencing, training for health, football, and cricket revealed the magazine's new approach to appeal to boys' tastes and interests. It became as fun and entertaining as the games and pastimes played outdoors with friends or brothers.

In order to consider itself a new «game», «Boys of England» soon began to propose its readers diversions, pastimes, rebus, riddles, anagrams and short comic recitals. The section titled, *The Young Mechanic*, for instance, guided children step by step on how to use small construction tools that could be useful in everyday life³⁶.

The emphasis on recreation went hand in hand with the magazine's scholastic and pedagogic objectives as well as its focus on the academic world: in its thirty years of publication, «Boys of England» issued nearly fifty public school stories and, hence, contributed significantly to the reform of this literary genre³⁷.

Written by W. Thompson Townsend, *The Captain of the School* was the first academic story to appear regularly after volume 35 in 1867³⁸. The values and messages advocated by the tale did not differ from what had been conveyed in various other school stories published in those years in England. Condemning the selfish and furtive behaviour of others, courageous protagonists displayed honest acts and used of violence solely for the purpose of defending little schoolchildren from bullies.

³³ See, for example, *Progress of the British Boys*, «Boys of England», vol. I, n. 1, November 24, 1866, p. 4.

³⁴ See: «Boys of England», vol. I, n. 2, December 4, 1866, p. 14.

³⁵ *Our sporting page. Boat and boating*, «Boys of England», vol. I, n. 1, November 24, 1866, p. 14. This tale was written under the supervision of Henry Kelley, a famous boating champion of that period. For the subsequent issues the magazine continued to use the support of the most famous sports personalities of the time to increase the prestige of this section.

³⁶ See, for example, *The young mechanic*, «Boys of England», vol. I, n. 25, May 11, 1867, p. 396.

³⁷ Banham, *Boys of England and Edwin J. Brett*, 1866-99, cit., p. 102.

³⁸ *The Captain of the School*, «Boys of England», vol. II, n. 35, July 20, 1867, pp. 129-131.



Pic. 2. *The king of the school*, «Boys of England», vol. VII, n. 167, January 24, 1870, p. 145 (Photography by the Author; courtesy British Library).

Unlike its competitors, «Boys of England» primarily represented «human» aspects of the daily school world – friendships, fights, brotherhood and rivalries. Here, it sought to provide children with a code of conduct based on values of loyalty, courage and honesty. Far from being upright models of virtue, the little heroes described were real children, whose disobedient and wayward behaviour made them comparable to their young readers³⁹. Editors tolerated

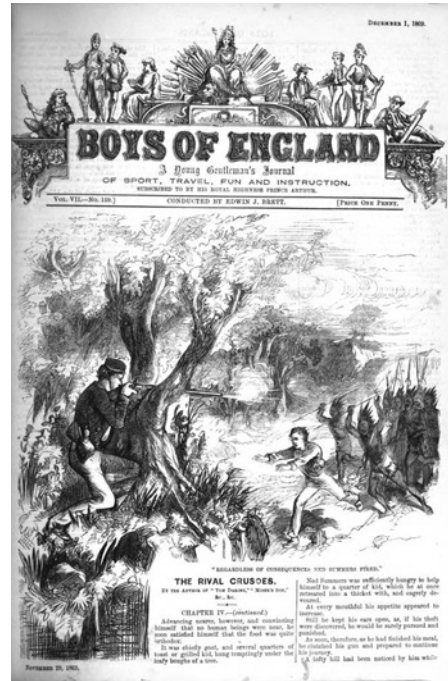
³⁹ *Ibid.*, pp. 109-118.

rebellion, because it also served to teach young people the values that made their motherland great.

All over, the magazine clearly makes apparent the editors' desire to provide readers a strong sense of respect and affection for their nation: many stories described the history of Britain and analysed myths and legends; with a focus on its present time, the magazine further reported all the social, economic, and scientific progresses that had garnered Britain notoriety in the world.

To that effect, particularly interesting is the magazine's vision of «the other» derived from England's colonial expansion. Imperialism had a large effect on British culture and, in particular, children's literature⁴⁰. While it was comparatively less extreme than other British children's magazines of the time, «Boys of England» was not extraneous to this recall and dedicated narrative and graphical space to represent the colonies of the British Empire. Particular regard was given to faraway Africa. The black settler often possessed the features of the savage and was represented with revealing clothing, antiquated weapons, and ridiculous somatic traits. In these stories, British heroes appeared courageous. They were proud representatives not only of the Nation but also of the Western civilization that opposed the barbarity and savagery of the local indigenous people, depicted often as unintelligent and violent.

The «Boys of England» expressed the will to make children aware of British morale and physique as well as the country's supremacy over all the other nations of the world⁴¹. Even the «white colonies» such as Australia, Canada and New Zealand were repeatedly put at the centre of stories and illustrations and became the means by which the magazine could point out the connection between the colonies and the motherland. The stories aimed to show how necessary it was for the England to protect its economic interests in the lands conquered by military intervention: in children's stories, the policy of free trade indeed was replaced by the legitimacy of the force policy to control possessions.



Pic. 3. *The rival crusoes*, «Boys of England», vol. VII, n. 159, December 1, 1869, p. 17 (Photography by the Author; courtesy British Library).

⁴⁰ *Ibid.*, p. 74.

⁴¹ *Progress of the British Boy*, «Boys of England», vol. I, n. 11, November 24, 1866, p. 4.

The American colonies were the setting of exciting adventures where a few brave settlers had to fight to protect themselves and their property from the attacks of savages⁴².

In some of the magazine pictures, for example, a small group of disadvantaged English settlers in the New World are confronted with a group of Native American Indians armed with spears and shields. The military and technological superiority of weapons in the hands of the settlers, nevertheless, allowed them to take an easy victory over the opponents, who were killed without remorse⁴³. The enemies, nonetheless, included not only Native Americans, but also Boers, Zulus, and Egyptians, who were actually involved in the colonial wars during Britain's world expansion.

The protagonists of the stories, exotic and mysterious, often included brave and intrepid yet bloody and violent British soldiers, who fought against not only rebels, but also a perturbing and dangerous nature populated by wild beasts.

The exotic animals became the protagonist of a new section published in «Boys of England» in 1867 with the significant title *Our Page of Sport*. Hunting such animals as lions, giraffes, elephants, gorillas, rhinos, hippos, alligators, tigers and buffalos was highlighted across these pages; and all the exotic animals of the colonies, admired for their beauty and physical strength, were described and illustrated in detail with emphatic tones. Inevitably, their fate was to submit to the English dominion and become preys for their pleasure.

Displaying the wonders and splendours of the conquered territories, the magazine also presented its readers images and stories that would inspire awe and curiosity. India particularly played an important role in this objective. Attaining distinction from the way in which the magazine depicted Africa and Africans, India earned great regard as part of the «official English Empire». Indeed, the country reproduced its administrative structure, its organization and housing institutions. Represented as an exotic but civil Nation, India was not a suitable subject for the adventurous spirit of the tales focusing on England's colonial conquests; the few stories set there simply described its most impressive aspects.

Since the 1880's, the success of «Boys of England» was partly undermined by the emergence of a new, important children's magazine, «The Boy's Own Paper», published in January 18, 1879 by the Religious Tract Society⁴⁴, a Christian publishing house.

⁴² C.M. Banham, «England and America Against the World»: Empire and the USE in Edwin J. Brett's *Boys of England*, 1866-99, «Victorian Periodicals Review», vol. 40, n. 2, 2007, pp. 151-171.

⁴³ See, for example, *At the old village Inn*, «Boys of England», vol. VII, n. 162, January 1, 1870, p. 77.

⁴⁴ Established in 1799, it was the most important British publication focusing on Christian literature and addressed, in particular, children, women and the poor. Publishing books and

The editor, James Macaulay, was the trust collaborator of the Religious Tract Society; he delegated most of his work to the young George Andrew Hutchison who assumed editing control of the new magazine after the former editor's death in 1897. Hutchison understood that to ensure the public success of the new periodical, it was necessary to imitate the innovative style of its competing penny-periodicals: it needed to give readers charming and amazing stories full of fascination and adventure in accordance with the limits prescribed by evangelical precepts⁴⁵.

The collaborators of the first issue of «The Boy's Own Paper» included the Rev. J.G. Wood, R. Ascott Hope, W.H.G. Kingston, Lambton Young, and Frank Buckland; later contributors of short stories and articles also included Arthur Conan Doyle, Jules Verne, and Robert Michael Ballantyne as well as Robert Baden-Powell, founder of the 1908 scouting movement.

The weekly publication, which later became a monthly in November 1913, had long and notable success and ceased its publication only in 1967, almost a hundred years after its debut.

«The Boy's Own Paper», like «Boys of England», cost one penny and consisted of sixteen pages full of tales, short stories, poems, riddles and games, all accompanied by rich iconography with high quality black and white images.

Its main illustrators were W.G.R. Browne, J.O. Davidson, S.L. Fildes, M. Fitzgerald, H. French, D.H. Friston, R. Huttula, A. Johnson, Davidson Knowles, James N. Lee, F. Lumley, W.M. May, W.H. Overend, T. Scott, and Edward Whympie⁴⁶.

Imitating the graphical model used by «Boys of England», «The Boy's Own Paper» reserved a large part of its pages for illustrations. Accurate depictions portraying scenes of family life, animals, and objects, for instance, described the most salient moments of each tale. As in «Boys of England», «The Boy's Own Paper» similarly used illustrations to offer its readers games, quizzes, puzzles, and prize competitions; «The Boy's Own Paper», however, distinguished itself for its high prevalence of educational and moralistic tales with the clear intention to spread Christian messages among young readers. Its educational intentions can be well perceived by the type of articles and stories published in the magazine over the years. The paper, for instance, refused to publish criminal and sensationalist stories, as it deemed them immoral. Compared to

periodicals, it elided with the Christian Literature Society for India and Africa to form the United Society for Christian Literature (USCL) in 1935. About the society: G.H. Gordon Hewitt, *Let the People read. A short history of the United Society for Christian Literature*, London, United Society for Christian Literature, 1949; D. Butts, P. Garrett, *From the Dairyman's daughter to Worrals of the WAAF: the Religious Tract Society*, Lutterworth Press and children's literature, Cambridge, Lutterworth, 2006.

⁴⁵ P.A. Dunae, *Boy's Own Paper: Origins and Editorial Policies*, «The Private Library», vol. 9, n. 4, 1976, pp. 123-158.

⁴⁶ *The illustrations are by*, «Boy's Own Paper Annual», vol. I, n. 1, (no date), p. 2.

the other children's periodicals of the same period, in fact, «The Boy's Own Paper» devoted much more space to scientific articles that could attract the attention of young readers thanks to their interesting and entertaining topics. The biographies of great British inventors were presented as a symbol of Britain's civil and industrial progress. Science lessons about insects, fireworks and optical illusions were able to introduce children to the complex concepts of chemistry, physics or zoology in a simple and straightforward way. Thanks to the exhaustive explanations and images accompanying the text, children were also able to reproduce the experiments at home and hence gain useful experience in their training and education⁴⁷.

The large space given to articles of science, history⁴⁸ or geography did not impede «The Boy's Own Paper» from including adventurous and heroic stories of fiction. Hoping to captivate and satisfy readers' tastes and imagination, a number of articles encompassed adventure stories with plots populated by sailors, explorers, wild beasts⁴⁹ and intrepid children.

Applying the classic formula of «teaching through enjoyment», articles on sports⁵⁰, travel, exploration, and art written by the most famous personalities of the era (such as the cricket champion William Gilbert Grace and the Arctic explorer John P. Cheyne) contributed to the public success of «The Boy's Own Paper».

For its variety of columns and contents, the magazine of the Religious Tract Society certainly repeated the pleasant and recreational intents of «Boys of England»; however, «The Boy's Own Paper» differed from its competitor for the type of audience it addressed. The readers of «Boys of England», comprised the children of the English working class; the subscribers of «The Boy's Own Paper» mainly consisted of middle class children of Victorian society. This former group was sensitive to the evangelical and Christian themes espoused in the magazine pages and were interested in defending those values⁵¹.

⁴⁷ See, for example, the section *Evening at home* edited with the clear intent to give to the children «pleasant hours» in his home: *Evenings at home*, «The Boy's Own Paper», vol. I, n. 1, January 18, 1879, p. 16. On the use of images and text on «The Boy's Own Paper» see J. Cox, *Take a Cold Tub, Sir! The story of The Boy's Own Paper*, Guildford, Lutterworth Press, 1982.

⁴⁸ National history, in particular, was at the center of the section titled *Boys of English History*. It described to its readers the country's history and focused attention on the events, which had child protagonists. See *Boys of English History*, «The Boy's Own Paper», vol. I, n. 5, February 15, 1879, p. 67.

⁴⁹ See, for example: *My Struggle with a Tiger* written by Charles Jamrach and published in «The Boy's Own Paper», vol. I, n. 3, February 1, 1879, p. 33.

⁵⁰ As the title suggests, *Outdoor Sports and Pastimes*, (See *Outdoor sports and pastimes*, «The Boy's Own Paper», vol. I, n. 1, January 18, 1879, p. 15), for instance, figuratively synthesized sport and leisure activities into the periodical making it an instrument for the children's entertainment.

⁵¹ As most of the stories appear to take place in well-furnished houses, or modern and prestigious schools and the scientific experiments require expensive materials, we can deduce that the readership consisted of upper-class children. See, for example: *My boat, and how I made it*, «The Boy's Own Paper», vol. I, n. 3, February 1, 1879, p. 47; *How to make a watch*, «The Boy's

Notably, the school stories were the best means to teach the young people – even the poor – the moral values that were taught in expensive private Christian schools. The first issue of the periodical opened with the publication of the Talbot Baines Reed story *My First Football Match*. The story recounted two school teams facing off in a football match⁵²; emphasizing the sport's importance, the tale promoted such ethical values as camaraderie, perseverance, and sportsmanship. Developing their physical and emotional capacities, these principles not only could shape children into good students but also, and above all, construct the future basis for Great Britain's superiority.

In these school stories, the morals were clear and explicit: characterized by strong loyalty, honesty, and boldness, good people were clearly distinct from the bad even in physical appearance. Their actions always followed the codes of conduct imposed by civil society and ensured their success. While employed in «Boys of England» to defend the weak, violence, for example, was totally rejected in «The Boy's Own Paper» as it conflicted with the Christian values the magazine sought to teach. Refusing the solitary and vengeful figure of the hero-pupil, «The Boy's Own Paper» adopted a brave child protagonist: he expressed loyalty and affection to his school friends and devout attachment to his teachers, whom he deemed good, brave, and able in shaping the intellectual and moral growth of his fellow classmates⁵³.

Another important aspect that distinguished «The Boy's Own Paper» from its competitors was its marked support of British imperialist policy. This was certainly a consequence of the will of the Religious Tract Society's support of British colonial expansion; it made it possible to reach distant and rugged lands where evangelization missions of the population could be promoted. Its imperialist ideology made «The Boy's Own Paper» one of the most active



Pic. 4. *My first football match*, «The Boy's Own Paper», vol. I, n. 1, January 18, 1879, p. 1 (Photography by the Author; courtesy British Library).

Own Paper», vol. I, n. 6, February 22, 1879, pp. 94-95.

⁵² *My First Football Match*, «The Boy's Own Paper», vol. I, n. 1, January 18, 1879, pp. 1-3.

⁵³ See *The triad*, «The Boy's Own Paper», vol. II, n. 1, 85, August 28, 1880, pp. 753-755.

promoters of the civilizing mission among the subjugated peoples⁵⁴. Support for imperialist policy was mainly conveyed by the enthusiasm of British Army regiments, who described armaments and victories both in the present and past. Moreover, «The Boy's Own Paper» devoted few pages to those members of the English Crown who had distinguished themselves for their heroic military exploits⁵⁵.

Marked racism is also prevalent in the imperialist magazine, in which subjugated peoples, particularly those of the African continent, are described in negative terms and are shown as stupid and ignorant: their state of «minority», therefore, rendered them needy of the intervention and protection of the culturally and intellectually superior white man⁵⁶.

As «Boys of England», «The Boy's Own Paper» likewise depicted dangerous but attractive the territories where brave British soldiers and explorers (including Henry Morton Stanley) found themselves fighting against wild and hostile populations and nature⁵⁷.

While the force and danger of nature possessed a certain charm for the reading public, the same could not be said about the descriptions of the African people oppressed by the British. They were nearly always described and portrayed as uncivilized, cannibalistic, and hence subservient.

In the late 19th century both «Boys of England» and «The Boy's Own Paper» faced significant economic hardship particularly due to the birth of numerous low-priced periodicals, known as half-penny periodicals. In light of their low cost, entertaining content, and wide circulation, the latter soon successfully dominated the former in the periodical market.

A pioneer in this field was Alfred Harmsworth, who founded such children's papers as «Comic Cuts», «Illustrated Chips», «The Halfpenny Marvel», «The Union Jack», «Pluck» and «The Boys' Friend», sold for only a halfpenny. Distinguished by a wide variety of themes⁵⁸, they were illustrated with vivid colour images and soon encountered a broad consensus among young readers of the popular classes. Inevitably, «Boys of England» encountered an economic

⁵⁴ In addition to ideological motives, Alfred Harmsworth was certainly also moved by economic reasons. In fact, he owned 500 shares of the British South African Chartered Company, and some scholars argue that the money was given to him by Cecil Rhodes to allow him to begin the publication of the «Daily Mail» in 1896.

⁵⁵ See *The Duke and Duchess of Connaught*, «The Boy's Own Paper», vol. I, n. 18, May 17, 1879, p. 280.

⁵⁶ See *The Feathered Policeman. A South African Story*, «The Boy's Own Paper», vol. I, n. 27, July 19, 1879, pp. 422-424.

⁵⁷ See *Stanley's Adventures in Africa*, «The Boy's Own Paper», vol. I, n. 35, September 13, 1879, pp. 550-554; *Stanley on the Congo*, «The Boy's Own Paper», vol. VII, n. 339, July 11, 1885, pp. 649-651.

⁵⁸ Among these periodicals «Pluck», in particular, conveyed strong nationalism and imperialism; «The Halfpenny Marvel» instead was devoted to nautical adventures while «The Union Jack» published stories about pirates, buried treasures and deserted islands.

crisis that caused the irreversible cessation of its publication in 1899 after thirty years in circulation.

«The Boy's Own Paper», instead, despite editorial difficulties, managed to overcome economic crisis thanks to the support of the Religious Tract Society; the magazine was published for a total of 89 volumes up until 1967.

4. *The English influence on the «Giornale per i Bambini»*

Having briefly examined the main characteristics of «Boys of England» and «The Boy's Own Paper», I will now discuss their influence on the «Giornale per i Bambini».

The influence was, firstly, of a «material» type: having the same size and page numbers, the «Giornale»'s format mimicked that of «Boys of England» and «The Boy's Own Paper». This made the paper quite small and handy and even more practical to use than its larger Italian competitors.

The second was of a «structural» type: in conformity with the English magazines, the «Giornale» consisted clearly of two sections of fiction and non-fiction.

Heeding the production of previous Italian children's periodicals, the «Giornale» proposed fairy-tales, poetry and legends that combined fantasy and magic with instructional messages. In these sections, morals were expressed with a language clear enough to capture the readers' attention.

Non-fiction sections in the «Giornale» encompassed such subjects as science and included games, prizes, correspondence, and advertisements. Modelled upon the English periodicals mentioned above, it thus became the first among its kind in the Italian market. In accordance with the laic-spirit of the «Giornale»⁵⁹ science articles, for example, informed children on Italy's civic and industrial progresses and encouraged independence. Correspondences, meanwhile, helped the magazine establish habitual and frequent contact between the head editor and the readers and placed the subscriber into a virtual group in which social and economic differences were abolished. Here, all children could feel free to take part⁶⁰ and communicate their tastes, expectations, desires, and daily life.

The third influence was of a «content» type: the «Giornale» reproduced the genre of stories and contests found in its English counterpart in order to increase its ability to compete in the market. The first competition organized by «The

⁵⁹ See, for example, *Pregiudizi e superstizioni*, «Giornale per i Bambini», vol. VII, n. 29, July 21, 1887, p. 458; *Sotto-terra. I minerali di ferro*, «Giornale per i Bambini», vol. VIII, n. 18, May 3, 1888, p. 275.

⁶⁰ *Ai nostri piccoli lettori*, «Giornale per i Bambini», vol. I, n. 1, July 7 1881, p. 15.

Boy's Own Paper», titled *A Story Needing Words*⁶¹ quite interestingly consisted of an illustration representing an elegant young man watching a sign «to let». The readers were invited to «give words» to the image and invent the plot. Much in the same way, a contest of a similar kind was issued in the «Giornale per i Bambini»; whose editors likely gained the idea from the English publication. Conditions for submitting tales to the competition in the «Giornale», for example, included sending a mandatory «certificate of authenticity» endorsed by a parent, a teacher, an employer or an adult responsible for the boy to the editorial office; this certificate would guarantee the originality of the work. This very same requisite was also set in the competitions published in the «The Boy's Own Paper»⁶². If the Italian competitions aimed at teaching grammar, the purpose of the English ones was to emphasize the clarity, brevity, and simplicity of the language⁶³.

Like the English periodicals, the «Giornale» dedicated considerable space to biographical and adventure tales. Manzoni, Dante or Petrarch's biography⁶⁴ was interspersed with that of such famous European personalities as Mozart or Adam Smith⁶⁵. The adventure tales, like the English ones, were set in lands and wild oceans far off and included brave children exploring the world⁶⁶.

Advocating self-reliance, the «Giornale» reminded its young readers that perseverance and hard work were the only means to increasing the economic and moral prosperity of the Nation⁶⁷.

Similar to «The Boy's Own Paper», the «Giornale» issued tales on the lives of young students. Among the most significant school stories produced in the «Giornale per i Bambini», *Ricordi di scuola* ('School Memories') by Oreste D'Angelo described the daily life of an Italian academy, which consisted of undisciplined pupils, punishments, children's regrets and adult forgiveness⁶⁸.

Offering perspective on foreign countries, the «Giornale» took inspiration from English periodicals in its descriptions of the African and American population. Focusing on savage lifestyles, the paper explored the lives of people living in the most remote and dangerous parts of the world⁶⁹. More so than its English competitors, the Italian periodical gave accurate descriptions about the

⁶¹ *A story Needing Words*, «The Boy's Own Paper», vol. I, n. 1, January 18, 1879, p. 16.

⁶² See *Prize Essay Subject*, «The Boy's Own Paper», vol. I, n. 7, March 1, 1879, p. 112 and *La storia di Frugolino*, «Giornale per i Bambini», a. I, n. 23, December 8, 1881, p. 368.

⁶³ *How to win the "Boy's Own" Prize*, «The Boy's Own Paper», vol. I, n. 5, February 15, 1879, p. 79.

⁶⁴ *Alessandro Manzoni giovinetto*, «Giornale per i Bambini», vol. I, n. 11, September 15, 1881, p. 161; *Le passeggiate al Pincio*, «Giornale per i Bambini», vol. II, n. 32, August 10, 1882, p. 506.

⁶⁵ *Adamo Smith*, «Giornale per i Bambini», vol. IX, n. 12, March 21, 1889, pp. 188-189.

⁶⁶ *Jack sulle barre*, «Giornale per i Bambini», vol. I, n. 11, September 15, 1881, p. 168.

⁶⁷ *Minuzzoli*, «Giornale per i Bambini», vol. II, n. 15, April 13, 1882, p. 228.

⁶⁸ *Ricordi di scuola*, «Giornale per i Bambini», vol. I, n. 4, July 28, 1881, p. 62.

⁶⁹ *Dore e Zizi*, «Giornale per i Bambini», vol. II, n. 9, March 2, 1882, p. 130.

lives of children in foreign countries in order to help its young readers better understand the variances and affinities between themselves and others⁷⁰. The ultimate goal was to make Italian children conscious of different peoples and nations in order to prepare them for the future economic, political and cultural exchanges that would result from industrial and social progress.

An important consideration in this «context» is the tone of the stories published in the «Giornale», which contrasted starkly with that found in «Boys of England» and «The Boy's Own Paper». The «Giornale per i Bambini» was well aware of its educational mission and presented stories that were morally less provocative than those in the English magazines. Communicating uplifting lessons in a clear and explicit way, the aim of the Italian magazine, as we have already said, was in fact to instruct young readers in the «Italian way» and, therefore, recompose geographical and cultural fractures to give strength to the new nation⁷¹. Biagi and his staff could not accept the rebels and antisocial rascals described in the pages of «Boys of England» as a model for their Italian readers. Indeed the English protagonists would have been too disruptive for the fragile social order found in Italy. While the «Giornale» gave birth to Pinocchio, one of the most famous rascals of children's literature, it is worth reminding the reader the traits that distinguish Collodi's character from the naughty boys in the English newspapers. Biagi was the first who immediately grasped the importance of Collodi's Pinocchio as a model protagonist for readers of the «Giornale» and published *La storia di un burattino* from the first issue of the magazine to January 25, 1883. Though a fickle, stubborn, and unwilling rascal who sought only to play and enjoy, Pinocchio was certainly not an exception on the pages of the «Giornale». His new and intriguing adventures espoused moral reflection and thus corresponded with the pedagogic goals of the «Giornale». A naughty puppet, Pinocchio dreamt of becoming a real child; his exploits encouraged his spiritual growth, and, having reached maturity by the end of the story, Pinocchio got his wish. Teaching children lessons of obedience and reward by means of Collodi's protagonist, the «Giornale» worked not toward eliminating the child's natural tendency toward misbehaviour; rather, it sought to teach by highlighting such real traits.

The last influence was of an «illustrative» type and was indubitably the most important. Like the British periodicals, Martini's magazine dedicated a wide space to illustrations and refused to consider the images as elements that could distract children from reading. It gave the images full dignity of publication with the text to which, thanks to their expressive power, allotted even greater prominence. The decision to give to the Italian market an editorial product equal to what was published in other European countries, however, conflicted with,

⁷⁰ *I bambini delle diverse nazioni a casa loro*, «Giornale per i Bambini», vol. IV, n. 10, March 6, 1884, p. 155.

⁷¹ Marescotti, *Educazione, istruzione e diletto*, cit., p. 68. pp. 53-70.

on the one hand, with the lack of artists specializing in the field of children's art and, on the other hand, with the high costs of production, layout and printing of the elaborate illustrations reproduced in the «Giornale». To overcome these obstacles, the editorial office decided to use images and friezes taken either from old engravings found within the country or from foreign publications.

The weight attributed to the images is even more evident if we consider them the means by which the editors gave «life» to the narration. As Biagi notes in his letter:

Each issue of the «Giornale» consists of articles with cartoons and articles without cartoons. We had enough of articles without cartoons, because they came to us from all over; but since our cartoons are not made for the articles, and vice versa the articles are made on the cartoons, it is clear that we could not have articles with cartoons if the articles were not ordered to the writers sending them the clichés. The articles with cartoons that are essential for a magazine that must have at least 8 illustrated pages were made from time to time to the steady collaborators. For those [articles] without cartoons was enough the contribution of the non-steady collaborators and the provisions of the manuscript of which the Head Office was provided⁷².

From this letter it is clear that the «articles with cartoons» appear through the construction of a plot around the image itself: the images arrived from abroad, and Biagi distributed them to the various writers, who had the task of inventing a story according to what the former communicated. On the pages of the «Giornale per i Bambini» there is a clear change in the make up of the stories, because the image does not just support the text, rather it gives the text life. By means of this layout in addition to the innovative relationship established between the editors and their readership, the magazine was able to offer anonymous, worthy, and refined black and white images that garnered immediate admiration.

Conclusion

The comparisons between «Boys of England», «The Boy's Own Paper» and «Giornale per i Bambini» allow us to see how the English helped define the model of the Italian periodical.

Having looked at the English periodicals, we can see that the Italian magazine adopted their material, structural, contextual and illustrative features. The adventurous and delightful tone of the stories and non-fiction articles; the great appeal that the images exerted on the young readers' minds; and the use of

⁷² Letter from Guido Biagi to the lawyer Bonani dated July 22, 1882 in NCLF, Fondo Ferdinando Martini, fasc. 4, b. 4.

enlightening sections illustrated the aspects of the British magazines, which Martini and Biagi highly regarded.

The «Giornale» first took inspiration from their structure and appearance. They allowed the Italian editors to use the space more efficiently and to better organize its contents. Divided into fiction and non-fiction sections, the «Giornale» likewise published numerous articles on various subjects: science, the homeland, industrial progress, national history, and foreign countries. By educating the new generation of the Kingdom in this way, the magazine could help consolidate the political and ideological institutions of the new state.

Like the editors of «The Boy's Own Paper» and the «Boy's of England», Biagi and Martini gave immense importance to the use of illustrations in the «Giornale». They recognized their ability to capture the readers' attention and reserved a significant amount of space for the images: 8 out of its 16 pages displayed «articles with cartoons» that accompanied new tales and launched writing competitions. The image became the most important element of the periodical and decreed its success.

In sum, Biagi and Martini decided to give the «Giornale per i Bambini» an open, curious, imaginative, and cosmopolitan mark. Offering elite Italian children a magazine influenced by what was being done in England, France, and the United States, Biagi and Martini succeeded in bringing young Italians into the forefront in the field of children's magazines. Thanks to the «Giornale»'s editors, Italian children could now compete on an equal level with the other great nations of the world. Providing the generation of young Italians of new, international and more interesting readings, the magazine became instrumental for their formation as future citizens of the kingdom. Their education to the moral and civil values necessary for building a common sense of Homeland was conveyed by pleasure tales and illustrations that encouraged a growing number of children to be put in touch with the new, being built 'Italian behaviour'.

L'edilizia per le scuole del popolo nell'Ottocento genovese

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Nineteenth century's building policies for the elementary school in Genoa

ABSTRACT: School life is silently conditioned by the container in which students respond to institutionalized cultural solicitations. It is a very different experience crossing the marble threshold of a grand palace and ascending imposing staircases to reach majestic corridors and halls, or climbing the small stairs of an anonymous building to enter rooms similar to those where housewives cook. In the early nineteenth century, Genoa's elementary schools were placed in makeshift buildings, usually older oratories; after Italy's unification these buildings were no longer in tune with the image of an Italy that was becoming a nation, and were perceived as even less adequate when the myth of the strong nation pervaded the Umbertinian age. To help this myth become established, building policies and detailed rules on school spaces and furnishings were put in place in Genoa as well as in the rest of the Country.

EET/TEE KEYWORDS: History of Education; Educational Building; School Equipment; Modernization; Italy; XIX-XX Century.

La storia dell'edilizia scolastica genovese della prima metà dell'Ottocento è immagine fedele e impietosa del disinteresse con cui amministratori e politici guardavano alla scuola del popolo: lasciata in un colpevole abbandono, le erano idonee sedi gli oratori dove si continuavano ad insegnare giaculatorie in cattivo latino e a piegare gli allievi a ritualità pervasive dal vago sapore salvifico. Era l'eredità dell'*ancient régime* che la breve parentesi rivoluzionaria e poi francese non aveva avuto né il tempo né le disponibilità economiche di modificare nonostante le conclamate dichiarazioni. Se i collegi degli ordini religiosi avevano occupato spazi sontuosi e imponenti, come si addiceva a luoghi deputati a far crescere la futura classe dirigente (anche se i figli del patriziato genovese andavano di preferenza a studiare fuori dei confini trovavano sempre

ambienti di raffinata architettura)¹, le scuole di carità per il popolo, fondate a Genova dal sacerdote Lorenzo Garaventa alla metà del Settecento e destinate a diventare il nucleo delle scuole comunali dal 1822, erano collocate in locali di fortuna. Alloggiate in oratori dismessi o costrette alla convivenza con le esigenze di culto, la loro sede non possedeva fisionomia propria ma coincideva con quella dell'istituzione religiosa che le ospitava: visivamente si realizzava quella identificazione tra istruzione e istruzione religiosa che era a fondamento del progetto educativo. Senza voler estremizzare la tesi che di scuola per il popolo si possa parlare solo dal momento in cui vi furono spazi appositamente destinati ad essa, la subordinazione logistica privava la scuola della sua specificità: la debole istruzione era annegata nell'educazione religiosa. Compitare un po' di termini latini delle preghiere era utile almeno a non storpiarle troppo nel ripeterle in chiesa.

La situazione edilizia dei luoghi deputati ad accogliere le bambine del popolo condivideva questa situazione solo parzialmente: la scolarizzazione femminile non esisteva come progetto autonomo e quando si accoglievano istanze istruttive queste venivano subordinate alle esigenze assistenziali o genericamente educative sempre affidate a strutture religiose che mettevano a disposizione le loro sedi di solito prestigiose. Così mentre le scuole di carità maschili vagavano alla ricerca di sistemazioni più o meno provvisorie le Congregazioni religiose femminili aprivano alle fanciulle da educare i loro edifici spesso di antico ed elevato pregio architettonico, né minor lustro e imponenza avevano i Conservatori appositamente innalzati dalla carità pubblica per accogliere le «Figlie» da educare. L'istituzione genovese più legata all'educazione delle fanciulle del popolo, quella delle Filippine attiva dagli inizi del Settecento, già dal 1710 aveva sede in apposito palazzo, dove ancor oggi esiste la scuola materna, di severa imponenza. Tra Sette e Ottocento, aprendo scuole di quartiere (Molo, Pré, Maddalena), le Filippine dovettero assoggettarsi alla ricerca di locali di ripiego come avevano fatto le garaventiane scuole di carità alle quali erano assimilabili e le somasche dovettero cercarsi un modesto appartamento nel quartiere della Maddalena, ma gli antichi Conservatori continuarono ad accogliere le «Figlie» in ambienti grandiosi.

Nel 1831 l'ispettore preposto dal Comune alle scuole primarie (nel 1825 le scuole di carità, dal 1822 passate al rango di comunali, avevano assunto

¹ «I patrizi di Genova mandavano i loro figli ad istruirsi ed educarsi in paesi forestieri come dicevasi allora, in altre regioni d'Italia come diremo noi al presente. I Collegi scelti per quanto mi risulta, era *Il Clementino* dei Somaschi in Roma, il *Tolomei* dei Scolopi in Siena, il *Collegio di S. Carlo* in Modena, il *Longoni* dei Barnabiti in Miano, il *Collegio di S. Maria degli Angeli* degli ex gesuiti in Monza» (L.M. Levati, *I Dogi di Genova dal 1771 al 1797 e vita genovese negli stessi anni*, Genova, Tipografia della gioventù, 1916, p. 439). La consuetudine aveva sollevato critiche tra chi temeva che l'educazione in ambiente straniero potesse compromettere la genovesità dei giovani: «altri ritornavano Sienesi, altri Romani, altri Lombardi, alcuni anche Piemontesi, nessun genovese» («Gazzetta nazionale genovese», n. 8, 5 agosto 1797).

ufficialmente nome di «scuole comunali primarie»), il sacerdote Agostino Cortese, descriveva ai suoi superiori lo stato della scuola di Santo Spirito nel quartiere di San Vincenzo:

Affinché le cose procedano sempre meglio, osservino di grazia le SS. VV. Ill.me che il tavolato a cui d'attorno là ivi siede la Scolaresca, non è certo proporzionato al numero ordinario, che una parte dei ragazzi, dopo aver letto va a sedersi nei banchi posti al di qua della balaustra, con pregiudizio del silenzio, e della modestia, atteso che il Maestro assistente alla classe superiore, non può certo volgere l'attenzione alla medesima, e che in conseguenza è d'uopo ingrandire con un'aggiunta il medesimo tavolato. Ed io con umile desiderio prego che si mandi ad effetto, perché mi venne raccomandato di esporne il bisogno.

Dal coro essendo passato a quella infelice stanza ov'è locata l'infima classe, vidi con gran piacere la promozione d'alcuni dal posto delle lettere a quel delle sillabe. Ma tal piacere venne subito amareggiato dalla strettezza del luogo, dalla quantità dei ragazzi che arrivavano sin d'allora al numero di 85, e dalle giustissime rimostranze di quel buon maestro. Or dunque, se mai le cure molteplici da cui si trovano angustiate le SS. VV. Ill.me non han permesso finora di sottrarre una volta al pericolo conosciuto il Maestro, e la Scolaresca io rinnovo le calde istanze fatte loro in tutti i rapporti, affinché almeno accrescavi una finestra nel mezzo di tale stanza, ed ingrandiscasi al pari un'altra situata verso la Capella. Lo merita la virtù paziente del Maestro, lo vuol la salute pubblica, per non chiamar con aria mefitica l'influenza altrove ostinata, voglio dire il cholera morbuo².

Qualche anno dopo la situazione sembrava addirittura peggiorata e il successore dell'ispettore Cortese denunciava condizioni insostenibili:

Ill.mi Sig.ri

Stanti le misure sanitarie, che si prendono con tanta premura e preoccupazione da chi presiede a tale Magistrato, mi faccio un dovere di far presente alle SS. LL. il stato della Scuola Comunale del Quartiere S. Vincenzo.

Vi sono in detta Scuola due stanze attigue alle due latrine, quali essendo state poco bene costrutte mandano un fettore insopportabile. La porta delle medesime è quasi sempre aperta stanti i frequenti, ed urgenti bisogni de' scolari, quali facendo molto uso dell'abbondante frutta si trovano alle medesime in gran numero, e non v'è tutta quella politezza che vi dovrebbe essere, e che sarebbe necessaria principalmente per allontanare ogni timore. Una di suddette stanze è larga solo palmi dieci, ed altrettanto alta, e vi si contano giornalmente 40 circa scolari, alcuni alle volte si sentono venir meno, e sono obbligati ad uscir di scuola, e prender aria, qualche Maestro parimente viene munito d'aceto, ed altro per reggere a tale fettore e preservarsi. Ond'egli Reverendi Maestri supplicano gli Ill.mi Sig.ri Deputati di detta Scuola di mandare chi meglio stimeranno ad apurare quanto si espone, e poi stante l'eccessivo caldo, ed altri timori anticipare la vacanza in Agosto, ed incominciare la scuola in Ottobre.

Da detta Scuola li 27 Luglio 1835 – Prete Giovanni Ginocchio Direttore³

² *Archivio Storico Comunale di Genova* (d'ora in avanti cit.: ASCGe), Amministrazione Decurionale 1135, 1833 in 34, *Direttori delle Scuole – Rapporti mensili*.

³ ASCGe Amministrazione Decurionale 1134. *Sestiere di S. Vincenzo – Scuola di S. Spirito. Scuola del Quartiere S. Vincenzo. Il Direttore della stessa chiede sia riparato l'inconveniente che nasce dal fettore di due latrine esistenti nel locale di suddetta scuola.*

Tale situazione perdurò fino alla metà dell'Ottocento. Nel 1846 Banchemo, attento descrittore del tessuto sociale genovese, registrava per tutta la città, che allora si aggirava sui centomila abitanti⁴, sei scuole maschili (le vecchie scuole garaventine di carità) e due femminili, tenute dalle Filippine con un piccolo contributo del Comune, cui si potevano aggiungere tre asili, panorama che non lasciava dubbi sulla immobilità dei livelli di scolarizzazione, confermata dalle relazioni di Casalis che collocava le sei scuole maschili ancora in altrettante strutture religiose⁵.

La svolta del 1848 fece registrare un sensibile incremento della popolazione scolastica⁶ senza tuttavia che venissero reperite nuove sedi: si preferì, o meglio si fu obbligati, a seguire la pratica di accrescere il numero delle classi negli stessi edifici o di affittarne ancora, scelta che serviva nell'immediato ma che non poteva essere risolutiva.

Il rapporto sulle civiche scuole stilato nel 1849 da Luigi Boselli, denso di novità e pregevole nel delineare un'organizzazione più efficiente delle scuole, aveva toni rassegnati nel descrivere lo stato dei locali: «all'attuazione compiuta del piano generale di Istruzione di sopra esposto, osta la qualità dei locali che le rispettive scuole occupano attualmente»; per le scuole elementari dei Sestieri di Maddalena, Portoria e Prè «il Consiglio ha già provveduto», per le altre «si trova in dovere di chiedere un assegnamento annuo di £ 4000 per fitti di

⁴ L'analisi del censimento del 1848 dà la cifra di 119.339 abitanti; sottraendo la popolazione 'mobile', come la guarnigione militare di terra e di mare, i ricoverati, i carcerati, gli studenti, il numero si riduce a poco più di centomila, in G. Felloni, *Popolazione e sviluppo economico della Liguria nel secolo XIX*, Torino, ILTE, 1961, p. 305.

⁵ «Nel sestiere di S. Vincenzo serve di scuola la chiesa di Santo Spirito; nel sestiere del Molo quella di S. Bernardo: l'oratorio di S. Ambrogio a quel di Portoria: pel sestiere di S. Teodoro, si poteva adoperare il locale a tal uso destinato dalla civica amministrazione nelle vicinanze della chiesa del santo titolare; ma per ora si raccolgono i fanciulletti in una casa vicina al luogo detto l'Allivo. I fratelli delle scuole cristiane, nuovamente introdotti in Genova, hanno la cura e l'insegnamento negli altri due sestieri della Maddalena e di Prè: nel primo insegnano in una porzione del vasto convento de' PP. Minori osservanti ad essi fratelli assegnato con porzione dicevole; nel secondo occupano la parte abbandonata del monistero delle Salesiane», *Dizionario geografico, storico-statistico-commerciale degli Stati di S.M. il Re di Sardegna compilato a cura del Professore Goffredo Casalis Dottore di Belle Lettere, Opera molto utile agli impiegati nei pubblici e privati uffizi, a tutte le persone applicate al foro, alla milizia, al commercio e singolarmente agli amatori delle cose patrie*, Torino, C. Maspero libraio e Cassone e Marzorati tipografi, 1833/1854, Vol. VII, 1840, pp. 433, 434.

⁶ Prima di tale data l'aumento della popolazione scolastica fu assai modesto. Secondo le statistiche del governo francese le sei scuole di carità agli inizi del secolo raccoglievano poco più di un migliaio di alunni maschi, cifra vicina a quella registrata alla fine del Settecento. Cevasco nel 1838 attribuiva alle stesse sei scuole 1490 alunni (*Statistique de la ville de Gènes par M. Cevasco*, Gènes, Imprimerie Ferrando, 1838, Tome premier, *Classification de la population de Gène par conditions et métiers*, p. 164 bis) e Banchemo nel 1846 ne assegnava 2120 (*Genova e le due Riviere. Descrizione di Giuseppe Banchemo membro corrispondente della Società letteraria della città di Lione e Di quella statistica di Marsiglia*. Genova, Luigi Pellas editore, 1846, pp. 212-222). In cinquant'anni la popolazione scolastica si era raddoppiata, aumento che potrebbe apparire notevole se il dato iniziale non fosse così basso da inficiarne il valore.

nuovi locali per le scuole elementari del Molo, di S. Teodoro, di S. Vincenzo». Ulteriori £ 5.000 servono «pel locale del Giannasio»⁷. «Aver provveduto» significava che il Comune continuava a pagare la pigione per i soliti locali o ne aveva affittato degli altri o aveva apportato qualche piccola miglioria.

Nel 1850 l'ispettore Vincenzo Troya continuava a lamentare l'inadeguatezza dei locali:

Quando saranno aperte le scuole di Sestiere di Prè e della Maddalena, quando quelle di S.to Spirito saranno collocate in più conveniente locale, quando tutte saranno provvedute di alcune suppellettili scolastiche che ancora mancano, e soprattutto quando saranno introdotti maestri abili come la maggior parte degli attuali, quando siansi, come per i maschi, così per le femmine, aperte sufficienti scuole, non s'avrà difficoltà ad asserire che Genova non è seconda a nessuna città italiana in Istituti di popolare educazione⁸.

La soluzione per la disastrosa scuola del sestiere di San Vincenzo fu, al solito, vista nel trasferimento in affitto in un caseggiato migliore e bisogna dire che questa volta la scelta sembrava azzeccata: era stato indicato addirittura il prestigioso palazzo Sauli, costruito su disegno di Galeazzo Alessi tra il 1552 e il 1554. Le autorità si erano affrettate ad intonare lodi alla previdenza municipale.

Chiunque visitava le scuole di questo Sestiere negli anni 1849, 50, 51 si meravigliava come il figlio del popolo fosse così mal provveduto di sale per l'Istruzione. L'Ispezzore Civico, l'Ispezzore Provinciale e l'Ispezzore Generale A. Fava, e quest'ultimo particolarmente, dichiaravano più volte e con forte risentimento che se la città non provvedeva altrimenti vi penserebbe il Ministero d'Istruzione Pubblica, ma rassicurato particolarmente il prefato Sig. Cav. A. Fava delle cure premurose del Municipio a quest'oggetto col prendere in affitto il palazzo Sauli, come stava allora il progetto, vergava allora per sola memoria nel libro dei documenti della scuola queste parole "Il sottoscritto non può a meno di manifestare la propria soddisfazione per il modo con cui viene impartita l'istruzione nella scuola del Sestiere

⁷ *Sulle civiche scuole. Rapporto della Commissione e deliberazioni del Municipio di Genova*, Genova, [20 settembre 1849], Gio. Ferrando Tipografo del Municipio, p. 13. Il relatore Luigi Boselli (1798-1886), sacerdote di formazione giansenista e di idee liberali, era stato collaboratore di Assarotti all'Istituto dei sordo-muti di Genova e alla morte del maestro ne aveva preso il posto come Direttore.

⁸ ASCGe Amministrazione Municipale 1262, *Istruzione pubblica. 1850. 14 aprile. Relazione di Troya ispezzore delle scuole civiche elementari*. Vincenzo Troya (1808-1883) fu uno dei principali protagonisti del rinnovamento pedagogico del suo tempo lasciando un'impronta decisiva in Liguria nel decennio (1846-1857) che lo vide attivo nella regione, docente al corso di metodo genovese del 1846 e del 1847 e poi professore di metodo, ispezzore per le scuole secondarie del circondario dell'Università di Genova, ispezzore delle scuole civiche del Comune di Genova. Si può ricordare la sua decisa presa di posizione contro le scuole di latinità che mescolavano l'insegnamento del leggere, scrivere e far di conto con i primi rudimenti del latino finendo per non far bene né l'uno né l'altro. Si batté per una scuola elementare sufficiente alle necessità di chi non avesse proseguito gli studi e base solida per l'istruzione secondaria.

S. Vincenzo, potendo rendere buona testimonianza del profitto degli alunni di 4a classe ch'egli esaminò specialmente. Desidera poi ardentemente che gli sforzi del benemerito Municipio abbiano ad essere coronati di buon successo onde aver locali migliori, giacché veramente i presenti sono di grave ostacolo al buon andamento delle scuole"⁹.

Le cose andarono diversamente, come scrisse nella sua relazione del 1867 Gerolamo Da Passano, ispettore delle scuole comunali succeduto nel 1852 a Vincenzo Troya:

Al Consiglio prevalse il timore delle economiche strettezze; e l'utile proposta, per le gravi difficoltà del civico erario, non ottenne i suffragi della maggioranza: né si poté così provvedere acconcio edificio alle scuole, salvare ad un tempo dalla speculazione privata, che lo deturpò, un palazzo annoverato tra le opere migliori di Galeazzo Alessi. Per la scuola maschile del quartiere [sestiere] si adattò l'antica chiesa di S. Spirito¹⁰.

Faticosamente frattanto cominciavano a farsi sentire gli effetti delle riforme scolastiche introdotte col nuovo regime politico e Gerolamo Da Passano, nella sua relazione del 1867 poteva indicare per l'anno scolastico 1865-66 undici sedi scolastiche maschili con poco più di 6.000 alunni e nove femminili con circa 5.000. Le cinque nuove sedi scolastiche maschili utilizzavano anch'esse soluzioni di ripiego, così come avveniva per le scuole femminili che avevano conosciuto uno sviluppo impetuoso soprattutto perché partivano quasi da zero¹¹.

Col precisarsi dell'interesse per l'alfabetizzazione popolare anche l'edilizia scolastica divenne un aspetto del problema educativo, ma la volontà di rinnovamento continuò a scontrarsi con le ragioni di bilancio: al fiorire di iniziative pedagogiche, di istituzioni di classi, di scuole originali come quelle industriali e tecniche, di aumento tumultuoso di scolarizzazione corrispose per quasi un ventennio la pratica di rabberciare locali inadatti, l'abbattere tramezzi e il costruir latrine, l'ampliar finestre e il chiuder corridoi e soprattutto un girovagare da edificio a edificio alla ricerca del meno peggio. L'aumento del numero delle classi e dei maestri gravava sul bilancio e invitava a risparmiare sugli edifici ma a frenare il rinnovamento agiva anche una vecchia mentalità che non si era mai posta con lucida preveggenza il problema della sede dove

⁹ ASCge Amministrazione Municipale 1268, *Scuole civiche. 1851, 13 settembre. S. Vincenzo. Direttore Casaccia.*

¹⁰ G. Da Passano, *Origine e progresso della Istruzione Popolare in Genova e attuali sue condizioni*, Genova, Tipografia del R. I. de' sordo-muti, 1867, p. 37. La relazione fu pubblicata a sé ma faceva parte della *Raccolta di relazioni speciali intorino alla Pubblica Istruzione in Genova, aggiuntovi un cenno sui provvedimenti adottati in materia d'igiene*, Genova, Tipografia del R. I. de' sordo-muti, 1867. Gerolamo Da Passano (1818-1889), professore di ginnasio, ispettore per le scuole civiche del comune di Genova fino al 1877, fu un attivo sostenitore del rinnovamento pedagogico. Nella sua relazione del 1867 si trovano notizie sulla storia delle istituzioni scolastiche genovesi che rappresentano ancor oggi un punto di riferimento per gli studiosi.

¹¹ *Ibid.*, p. 157 e p. 159.

avveniva l'alfabetizzazione primaria dei figli del popolo. Per secoli ci si era abituati a utilizzare strutture religiose e la consuetudine di unire educazione con religione era dura a morire: la chiesa di Santo Spirito venne abbandonata solo nel 1881.

Anche nella relazione del 1867 di Da Passano il tema dell'edilizia era trattato incidentalmente: ci si muoveva sempre nell'ottica degli aggiustamenti e se occorreivano nuovi spazi si pensava ad adattamenti di quelli già esistenti o si rinunciava: «Fin dall'autunno del 1863 il Consiglio Comunale deliberava l'istituzione di altre due scuole inferiori maschili affidate a Maestre: una pel Sestiere di S. Vincenzo e l'altra per quello di S. Teodoro; ma tale deliberazione non poté avere effetto sino ad ora per l'assoluta mancanza di edifizî opportuni»¹².

Nel 1900 il Direttore generale delle scuole civiche, Edoardo Canevello, presentò al Sindaco della città di Genova un'ampia relazione sullo stato delle istituzioni educative comunali e tra i molteplici aspetti esaminati e l'abbondanza di statistiche c'era il rapporto dell'Ingegnere capo della Sezione di Edilizia all'ufficio dei Lavori Pubblici, Clodoveo Cordoni, che ripercorreva la storia dell'edilizia scolastica comunale nell'ultimo quarto di secolo. Nel corposo allegato (ben 94 pagine) non erano lesinati giudizi severi e impietose ricostruzioni della politica edilizia del Comune:

Prima del 1872 tutte le scuole civiche di Genova erano collocate o in antichi conventi, che in forza della legge 7 luglio 1866 passarono in uso ai Municipi coll'obbligo di destinarli al servizio dell'istruzione, od in caseggiati ed appartamenti facenti parte dell'asse patrimoniale del Comune, oppure presi in affitto da privati. Nessuna scuola, prima di tale epoca, poteva vantarsi di essere allogata in un fabbricato costruito *ad hoc*¹³.

In realtà non tutte le 'soluzioni di ripiego' erano state infelici; in qualche caso edifici privati o acquisiti dal Comune offrivano sistemazioni dignitose, utilizzate spesso per decenni e a volte giunte fino ai nostri giorni, ma aveva ragione Cordoni nel denunciare l'inesistenza di una visione complessiva del problema edilizio fino ai primi anni Settanta quando si fece sentire la necessità di dare veste e immagine moderne alle istituzioni del giovane Stato e l'amministrazione comunale fu obbligata a prendere in considerazione le condizioni degli edifici scolastici e a destinarvi risorse. A Genova si riuscirono a trovare le somme necessarie alla costruzione di due dignitosi edifici nuovi.

¹² *Ibid.*, p. 74.

¹³ C. Cordoni, *Gli edifici scolastici della città di Genova*, in E. Canevello (a cura di), *Municipio di Genova. Ufficio d'Istruzione Pubblica. Sezione Generale Statistica. MDCCCLX. Gli Istituti Municipali di Pubblica educazione e di Istruzione in Genova nell'anno 1900. Relazione ufficiale. Documenti e statistiche*, Edita a cura del Municipio, Genova, Tip. della Civica Scuola d'Arti e Mestieri assuntori fr. Pagano, 1900, p. 168. La relazione dell'ingegner Clodoveo Cordoni allegata alla relazione del Direttore generale delle scuole civiche fu anche pubblicata a sé: *Gli edifici scolastici della città di Genova*, Genova, Il Municipio, 1900.

Nel 1872 sorse la «Tommasina Fieschi» in via Fieschi sovrastante l'antico nucleo del centro storico, primo tentativo di pensare un edificio scolastico in assenza di quella legislazione che negli anni successivi servì a dare norme rigorose ad ogni aspetto dell'ambiente scolastico.

Il progettista si ispirava all'idea che una scuola doveva avere «architettura da modesta casa borghese», non aspetto di palazzo pubblico capace di differenziarsi dal contesto urbano entro cui sorgeva ma, al contrario, di struttura in grado di scomparirvi. La «Tommasina Fieschi», nata per ospitare due scuole femminili, aveva una pianta quadrata, un piano in parte sotterraneo (per la pendenza della via che «raggiunge il 7,40 per cento»), due piani per le aule (9 al primo, 10 al secondo), un sottotetto dove erano ricavate le abitazioni per le Direttrici. Ogni piano aveva ingresso separato: da via Fieschi il primo, dal terrazzo a valle del fabbricato il secondo. Opportunamente i servizi erano localizzati nel lato meno felice dell'edificio, quello contro il muraglione della via sovrastante. Mancavano gli spazi per ricreazione e ginnastica, strutture di cui non si avvertiva ancora l'urgenza.

Alla fine del secolo l'edificio venne ritoccato per rispondere alle nuove necessità: la popolazione era aumentata e bisognava ricoverarvi anche la scuola maschile («Guglielmo Embriaco»). La ristrutturazione, per quanto possibile, si adeguava a quanto era ormai fissato dalle leggi e apprezzato dal gusto del tempo. Alla pianta quadrata vennero aggiunti due avancorpi laterali sporgenti fino al margine della strada e l'edificio fu sopraelevato di un piano eliminando le abitazioni del sottotetto per contenerne l'altezza e lasciare la vista ai palazzi della sovrastante via. Le 100.000 lire necessarie alle modifiche, somma di poco inferiore a quanto speso per l'edificio originario (£ 133.399,80), furono giustificate dall'aumento dei costi di materiali e mano d'opera, dall'aver usato cemento armato anziché legno, da modifiche interne. In alto, al centro della facciata, era stato collocato un grande stemma della città: adesso la scuola aveva assunto il carattere di palazzo pubblico.

Nel 1873 si iniziò la costruzione di un nuovo edificio scolastico nel sestiere di S. Teodoro: la scuola «Gabriello Chiabrera». Non c'erano ancora le leggi sull'edilizia scolastica, ma gli amministratori non vollero ripetere i canoni della normale edilizia abitativa: cercavano un modello nuovo, funzionale all'attività scolastica e lo trovarono in Belgio dove una delegazione municipale aveva studiato le soluzioni là adottate per gli edifici pubblici. Venne fuori un originalissimo edificio, ancor oggi adibito a scuola, impostato su un disegno a stella: dal corpo centrale dodecagonale, coperto a cupola, si dipartivano sei bracci, dove erano collocate le aule. Uno di questi, a T rovesciata era l'ingresso con un vestibolo, i locali di servizio e gli scaloni per i piani superiori. Il grande vano centrale, che nell'originale belga era libero in tutta l'altezza dal pavimento alla cupola, venne diviso in due livelli dal secondo piano in modo da servire da sala di ricreazione rispettivamente per gli scolari del pianterreno e primo piano, e per quelli del secondo e terzo. Il rapporto dell'ingegner Cordonis si soffermava

sulle carenze e sui pregi: tra le prime la scarsa luminosità dei saloni cui erano addossati i bracci che limitavano lo spazio per le finestre, tra i secondi la presenza di «un grande ricreatorio centrale elemento affatto mancante negli edifici prima d'allora costruiti»¹⁴, sale ampie, luminosità delle aule (anche se non razionale, a detta dell'ingegnere) e soprattutto la comodità di sorveglianza: «invero basta che il Direttore delle scuole si rechi nei saloni centrali per tutto e tutti sorvegliare, allievi e maestri»¹⁵. Lo stesso ingegnere spiegava quale concezione della scuola sottintendesse il progetto: «Il concetto seguito nell'idearlo rispecchia un genere di costruzioni escogitato alcuni anni prima per edifici pubblici dei quali si ha esempio classico nel carcere cellulare di Milano e nel manicomio provinciale al Cavalletto in Genova»¹⁶. L'esigenza della massima sorveglianza col minor impiego di personale era il criterio che aveva fatto scegliere questa struttura, criterio che senza alcuna ritrosia associava la scuola al carcere e al manicomio¹⁷.

Manicomi, carceri e scuole furono in quel momento accomunati da identica preoccupazione di controllo della popolazione che vi era raccolta. Nuova sensibilità, nuove leggi sull'edilizia scolastica impedirono che il modello si ripetesse ma all'abbandono contribuì senza dubbio anche l'elevato costo: £ 304.337,72 per le 20 aule previste. La fame di edilizia scolastica, dopo quelli che si potrebbero considerare esperimenti, continuò a rivolgersi verso edifici preesistenti dove i costi di riadattamento, anche se non sempre economicamente leggeri, consentivano risparmi in tempi, a giudizio dell'Assessore Jacopo Virgilio, particolarmente difficili: «Dall'anno 1875 al 1877 segue un periodo di scarso progresso per le nostre scuole. Non si costruiscono nuovi locali, gli antichi si lasciano privi di comodità e si trascurano. Nessuna miglioria si apporta nelle condizioni degli insegnanti. Le scuole difettano d'acqua e di arredi scolastici, e gli alunni vi si accumulano senza alcun riguardo all'igiene»¹⁸. Anche riadattare edifici di antico pregio, pur sempre soluzioni di fortuna, era impresa scoraggiante. Ancora Jacopo Virgilio nella sua relazione (1878) descriveva situazioni evocative delle precarie sistemazioni delle settecentesche scuole di carità. Fu il caso della ristrutturazione del Convento dei SS. Giacomo e Filippo

¹⁴ *Ibid.*, p. 176.

¹⁵ *Ibid.*, p. 175.

¹⁶ *Ibid.*, p. 172.

¹⁷ Banchemo così descriveva il manicomio genovese: «Compongono il detto edificio sei lunghi bracci di fabbrica, disposti intorno ad un fabbricato centrale giusta il sistema raggiante. Cinque sono i piani del corpo centrale il di cui maggior diametro si è di metri 32 e l'altezza di metri 35 circa», *Genova e le due Riviere*, cit., p. 122. La struttura del manicomio derivava da quella degli edifici carcerari: «Il disegno è quello delle carceri penitenziali degli Stati Uniti d'America; ma con questa differenza, che in luogo dell'osservatorio circolare nel centro si preferì la forma ellittica, così in luogo di un veditore, ne abbisognano due, essendo due i fuochi, o quasi centri, dell'ellissi. Dall'interno ellittico, non dalla cupola, si spiccano sei ale, o braccia in forma divergente destinate all'abitazione dei pazzi», *Dizionario geografico, storico-statistico-commerciale degli Stati di S. M. il Re di Sardegna compilato a cura del Professore Goffredo Casalis*, cit., Vol. VII, 1840, p. 426.

¹⁸ *Le scuole della città di Genova negli anni 1877-1878. Note di Jacopo Virgilio Consigliere Municipale già Assessore delegato alla Civica Istruzione*, Genova, Tip. fr. Pagano, 1878, p. 7.

di proprietà del Comune, dove erano collocate una scuola industriale per le artigiane, una femminile di disegno industriale e una elementare femminile che accoglieva la popolazione scolastica dell'area che dal sestiere di San Vincenzo saliva, con le vie realizzate alla metà del secolo, verso la zona collinare.

Devo però con dispiacere dichiarare che malgrado ripetute ed esplicite deliberazioni della Giunta, che mai furono eseguite, una parte di questo istituto è tuttora abitato da una quantità di individui estranei affatto allo stabilimento e per la più parte mendicanti, i quali non pagano al Comune alcun fitto riescono molestissimi alle scuole e danneggiano il locale. Il piano terra inoltre è già da vari anni occupato in parte da una stalla, dalla quale esalano molesti fetori, mentre i carri e gli animali che continuamente si trovano sulla piazzetta per cui si accede all'attigua scuola femminile di disegno industriale, son cagione di gravi inconvenienti e di pericoli, così per le alunne come per le persone che le accompagnano. Di ciò replicatamente mossi lagno, indottovi anche dalle giuste rimostranze del giornalismo, ma sino ad ora ogni sforzo riuscì vano¹⁹.

Una soluzione fu trovata solo dall'Assessore comunale Garibaldi che nella sua relazione (1881) racconta l'operazione, invero piuttosto laboriosa:

Dapprima, mediante la costruzione di un muro divisorio in un corridoio, liberai le scuole dal disturbo che arrecava il continuo passaggio dei poveri alloggiati nei sottotetti di quel vasto edificio; poi riuscii a ottenere lo sgombero delle stanzette occupate da persone estranee all'istituto; finalmente fu libero anche un corridoio, che era servito come luogo di deposito. Promossi dalla Giunta Municipale l'ordinamento dello sgombero della famosa stalla, e affinché anche questa volta la deliberazione della Giunta non rimanesse senza effetto, sollecitai i lavori necessari per dare un ingresso più conveniente e dicevole a quell'istituto. Occupata in tal modo metà della stalla, la parte rimanente non poté più servire all'uso per cui era destinata, e il conduttore si determinò ad abbandonarla. In questa guisa ottenni ciò che tanto mi premeva, di liberare la scuola da sì molesta vicinanza. Si lamentavano i genitori delle alunne che quella scuola non avendo un conveniente ingresso non offriva loro modo di ripararsi dalle intemperie allorchando si presentavano per ritirare le loro figliuole. A queste giuste rimostranze, si provvide colla costruzione di nuovo ingresso unico per tutte le scuole ivi collocate, il quale, non solo offre ai parenti luogo acconcio per ripararsi dalla pioggia e dai rigori della stagione mentre stanno aspettando il termine della scuola, ma mettendo in un ampio giro di scale che vanno nell'interno dell'istituto, toglie all'intero edificio quell'umile aspetto, che giustamente fu detto dall'egregio Assessore Virgilio, di casa in rovina²⁰.

Nel 1880 iniziò la costruzione di un terzo edificio scolastico nel sestiere di San Vincenzo destinato alla scuola maschile «Agostino Descalzi» e alla femminile «Orietta Doria». Nella relazione dell'Assessore Garibaldi ci sono note di giustificata soddisfazione per il progetto:

Questo grandioso edificio, di m.q. 557,65 in un'area di m.q. 1337,90 conterà oltre ai fondi, del pianterreno, di quattro piani superiori per l'insegnamento, ed un piano per le abitazione

¹⁹ *Ibid.*, p. 20.

²⁰ *L'istruzione pubblica in Genova. Relazione di P. M. Garibaldi Assessore delegato*, Genova, Tip. fr. Pagano, 1881, p. 8.

dei Direttori e degli inservienti. Il pianterreno, con due ingressi separati, conterrà quattro vaste sale di metri quadr. 235,44 in superficie per uso ricreazione. Ognuno dei quattro piani destinati all'insegnamento, avrà dodici sale di m.q. 40,60 di superficie ciascuna, e un'altezza di metri 4²¹.

Gli entusiasmi dell'Assessore vennero ridimensionati da una realizzazione più modesta; la relazione Cordoni, critica sui quattro piani, altezza non più rispondente ai dettami della legge edilizia scolastica, descriveva una scuola che «non presenta nessun ambiente destinato alla riunione degli scolari, alle palestre di ginnastica ed alle ricreazioni al coperto»²², elementi divenuti indispensabili per la nuova pedagogia che nell'educazione fisica vedeva un potente mezzo di educazione. Le aule inoltre erano solo 25, ma si era potuto risparmiare sui costi: il preventivo si aggirava sulle 240.000 lire mentre il fabbricato ne venne a costare 141.357,15.

Frattanto ci si doveva occupare anche delle scuole di quei Comuni che con Regio Decreto del 26 ottobre 1873, n. 1638, erano stati uniti a Genova.

Una nuova scuola femminile elementare venne costruita a Marassi, nella bassa val Bisagno, per l'interessamento del marchese Niccolò Brignole che ne assunse tutte le spese, sopravvivenza dell'ottica degli interventi caritativi privati che a Genova avevano una antica e illustre tradizione:

L'arredamento del locale, fatto su modelli provvisti dal Civico Museo Pedagogico, è quale si conviene ad una scuola esemplare. I banchi sono del tipo che fu presentato e lodato al Congresso igienico Internazionale di Torino e all'Esposizione Nazionale di Milano; le sale sono fornite di ottime collezioni di carte per l'insegnamento oggettivo e di bellissime oleografie rappresentanti scene di famiglia. Vi ha inoltre una delle più belle collezioni di solidi geometrici, magnifiche carte geografiche, pesi e misure per l'insegnamento del sistema metrico: infine tutto quanto può desiderarsi di meglio, e quanto è consigliato dalla moderna pedagogia, fu provveduto dal Marchese Brignole²³.

Un altro edificio venne costruito a Quezzi, località compresa nella stessa delegazione di Marassi, mettendo in atto le procedure che in seguito sarebbero divenute indispensabili, a cominciare dall'individuazione del terreno adatto:

L'egregio Assessore Garibaldi ideò di costruire un edificio scolastico per provvedere all'istruzione della borgata di Quezzi, che contenesse almeno quattro sale, cioè due per gli alunni e due per le alunne, un ampio corridoio per ricreazione e l'insegnamento ginnastico, e un buon tratto di terreno scoperto, per questo medesimo uso. A questo fine si adoperò che fosse eseguito il progetto ed acquistata l'area per la costruzione del detto edificio scolastico, che non tardò molto ad essere innalzato. Io ne feci sollecitare il compimento, e fin dal marzo p.p. vi feci trasferire le scuole che stavano assai a disagio nell'oratorio di Quezzi²⁴.

²¹ *Ibid.*, p. 13.

²² Cordoni, *Gli edifici scolastici della città di Genova*, cit. p. 178.

²³ *La pubblica istruzione in Genova, Relazione dell'Assessore delegato* [G. Falcone], aprile 1884, Genova, Tip. fr. Pagano pp. 13-14.

²⁴ *Ibid.*, pp. 15-16.

I progetti architettonici erano accompagnati da un'attenzione per strutture una volta ignorate, come palestre, giardini, spazi ricreativi e per dotazioni didattiche secondo i dettami di una pedagogia che cominciava a ritenere indispensabile organizzare tutti gli spazi utilizzati dagli alunni nel tempo scolastico. Proprio in quegli anni quella 'summa' della pedagogia del Positivismo che fu il *Dizionario illustrato di pedagogia*, diretto da Antonio Martinazzoli e Luigi Credaro, dedicava numerose voci alla trattazione dell'edilizia scolastica, delle suppellettili (il banco per gli alunni, ad esempio, fu oggetto di particolari studi)²⁵ e dei sussidi didattici.

Dopo quasi un decennio di pausa, nel 1889 venne iniziata la costruzione di una nuova scuola nel quartiere di San Fruttuoso (Comune autonomo fino al 1873 quando fu unito a Genova) sulla riva sinistra del torrente Bisagno appena a monte della ferrovia. Era un grande parallelepipedo (m 62,80 x 30,70) di tre piani destinato ad accogliere tre scuole divise col sistema detto «a sezioni orizzontali»: nel seminterrato e al primo piano la scuola d'Arte e Mestieri²⁶, al secondo la «Giovanni Carbone» elementare maschile, al terzo la «Maddalena Pallavicini» elementare femminile, ognuna con entrata indipendente. C'erano un cortile interno, ampi corridoi, 36 aule, 7 saloni e un serie di locali di servizio. Lì furono sperimentate le finestre con *vasistas*, struttura che permetteva di regolare l'afflusso dell'aria con l'inclinazione della parte superiore del vetro, sistema esteso alle successive costruzioni. Il costo complessivo dell'edificio fu di £ 607.039,56.

Non era ancora terminata la costruzione e il Comune varava un piano per tre nuovi edifici, uno in corso Torino, nella zona di espansione urbana sulla piana del Bisagno, e due (una in via Ambrogio Spinola e l'altra in quello che sarebbe diventato corso Firenze) nell'area collinare alle spalle del centro cittadino dove si stava realizzando la «Circonvallazione a monte», serie di viali che avrebbero aggirato la città. Frattanto erano entrate in vigore le disposizioni sull'edilizia scolastica che, dopo una prima circolare (1881) avevano trovato nella legge dell'11 novembre 1888 l'elenco dettagliato dei criteri cui dovevano rispondere

²⁵ Al banco era dedicata un'ampia voce corredata di disegni con le misure per rendere il più razionale possibile la postura dell'alunno; *Dizionario illustrato di pedagogia*, diretto da A. Martinazzoli e L. Credaro, Milano, Vallardi, uscito a dispense tra il 1894 e il 1908 e raccolto in tre volumi, Vol. I, pp. 130-135.

²⁶ Nel piano interrato erano stati installati macchinari industriali dove gli studenti che avevano conseguito la licenza elementare potevano frequentare la scuola di Arti e mestieri organizzata dal Comune in collaborazione con gli industriali, tra i più rappresentativi per meccanica, arti del legno, tipografia, litografia, oreficeria e filigrana, cui in seguito si aggiunsero elettrotecnica, lavorazione artistica del ferro. Negli accordi fissati nel 1893 si era stabilito: «1° che la durata della Scuola fosse di 10 ore al giorno con un'ora di riposo, 2° che gli alunni non dovessero fare servigi agli operai, 3° che in ogni officina gli allievi fossero divisi in due squadre, e che mentre l'una attendeva al lavoro l'altra fosse applicata allo studio, 4° che il Municipio avrebbe provveduto gratis il locale e la forza motrice, ed i signori industriali il macchinario, la materia prima e i Maestri d'arte» (Cordonì, *Gli edifici scolastici della città di Genova*, cit., p. 102).

le nuove costruzioni scolastiche a cominciare dalla loro capienza, calcolata al 15 per cento della popolazione potenzialmente interessata.

Il primo dei nuovi edifici programmati, quello di corso Torino, fu il banco di prova della nuova edilizia che si confrontava per la prima volta con disposizioni legislative organiche.

La nuova scuola, intitolata a «Cristoforo Colombo», doveva servire la zona, destinata a diventare centrale per la città, compresa tra la riva del mare, la collina di Albaro, il torrente Bisagno e la ferrovia. La pianta quadrata dell'edificio racchiudeva un cortile su cui si affacciavano solo locali accessori (corridoi e palestre) e quelli previsti dal 2° comma dell'articolo 5 della legge: direzione, sala d'aspetto e «camera di riunione per gli insegnanti», guardiola del bidello, latrine collocate al lato nord, come richiesto dal primo comma dell'articolo 13. Lungo il perimetro erano collocate 10 classi per la scuola elementare maschile. Il pianterreno, in corrispondenza alle aule e ai corridoi, era provvisto di sotterranei (art. 4°), mentre sotto le palestre venne realizzato un vespaio in comunicazione con l'esterno. Le abitazioni dei custodi avevano ingresso separato ed erano posizionate in modo che nessuna finestra avesse luce diretta sui locali della scuola.

Al primo piano, oltre a 10 aule per la scuola femminile, una sala per il museo pedagogico e un ampio salone; al secondo 10 aule per una scuola tecnica (piano poi utilizzato per l'istruzione primaria), un ampio salone come al primo piano e un terrazzo aperto. Scalinate laterali indipendenti davano accesso ai piani superiori.

Il progetto seguiva tutte le indicazioni previste dalla legge: altezza dell'edificio, numero dei piani, cubatura dei diversi vani, superficie delle aule («rettangolari», art. 7). Il progettista aveva posto particolare attenzione ai problemi della ventilazione cui erano dedicate quattro pagine e a quelli del riscaldamento che, tra calcoli e spiegazioni tecniche, ne prendevano una decina. Le preoccupazioni igienico-sanitarie, in coerenza con il sentire del tempo, avevano assunto importanza centrale regolamentando non solo aspetti per così dire ovvi come il posizionamento e il funzionamento delle latrine o il riscaldamento dei locali, ma si estendevano a particolari precedentemente sottostimati come la luminosità delle aule che veniva minuziosamente definita: dipendente dall'ampiezza e dalla posizione delle finestre, la luce doveva essere unilaterale, mai di fronte o di spalla (5° comma art. 8). I vetri dovevano avere dimensioni superiori a $\frac{1}{4}$ della superficie del pavimento.

La scuola, costata £ 435.553, fu pronta nel 1892 in tempo per le celebrazioni colombiane.

Il modello ormai poteva essere ripetuto con le varianti che il terreno suggeriva o imponeva; le norme edilizie erano fissate ed erano in sintonia con le prescrizioni pedagogiche: aule grandi, collegate da spazi ampi (corridoi e saloni), contornate da cortili per esercitazioni all'aperto, palestre e possibilmente l'orto. Politica e pedagogia andavano d'accordo anche nel volere un edificio severo, capace con i suoi elementi architettonici, movimentati ma senza fronzoli inutili, di

comunicare austerità e rispetto, in grado di farne immediatamente percepire la funzione: questa è una scuola, qui c'è lo Stato dell'Italia umbertina.

La scuola di via Ambrogio Spinola seguì i criteri ormai acquisiti. L'amministrazione aveva dato prova di lungimiranza nel prevedere un edificio scolastico in un'area periferica; c'erano state perplessità ma era prevalsa la considerazione che un futuro sviluppo della zona avrebbe reso indispensabile provvedere alla popolazione scolastica di una vasta area che si estendeva all'estremo Ponente dei corsi della «Circonvallazione a monte». La disponibilità di spazio permise una costruzione a pettine con tre bracci perpendicolari alla facciata che delimitava due cortili aperti (come consigliato dalle norme edilizie scolastiche). Nei bracci laterali latrine e sale di disimpegno, in quello centrale una palestra coperta. La forte pendenza della via consentì di predisporre a valle un ammezzato capace di accogliere l'abitazione del custode, refettori e cucina. I tre piani dell'edificio, con accesso separato per alunni e alunne alle estremità dei lati, avevano 18 aule e tre grandi saloni. In questo edificio venne utilizzato il sistema di separare le scuole maschili, «Ambrogio Spinola», da quelle femminili, «Eleonora Ruffini», secondo una divisione verticale (la femminile a valle, collocazione migliore, per un dovuto riguardo agli esseri più deboli e più delicati)²⁷ anziché orizzontale come nelle precedenti costruzioni, soluzione giustificata dalla difficoltà di dividere orizzontalmente in due parti equivalenti i tre piani dell'edificio: ci sarebbero state zone di contiguità tra alunni e alunne, cosa che scandalizzava progettista e committenti oltre che la pedagogia del tempo: «Se a tale circostanza i popoli nordici danno poca importanza, noi, popoli meridionali, non possiamo trascurarla, data la precocità dei nostri ragazzi»²⁸. Il disagio per le scolaresche di salire e scendere tre piani di scale veniva mitigato suggerendo di collocare i bambini più piccoli al pianterreno e quanto al Direttore si faceva appello al suo spirito di servizio:

Nessuno degli ottimi, attivi ed oculati nostri Direttori, vorrà lamentarsi perché, compresi del loro dovere, sanno che se meno agevole per loro riuscirà la sorveglianza, questa diverrà più efficace, poiché il Direttore presentandosi, inaspettato, ora nell'uno ora nell'altro piano dell'istituto, nel quale sono raggruppate poche aule e quindi riuniti in numero ridotto ed Insegnanti ed allievi, con un solo sguardo potrà dominare la posizione, e tutto abbracciare²⁹.

Ben più arduo sarebbe stato ottenere l'entusiasmo degli inservienti:

Siamo ben lungi, in Italia, di avere come in Inghilterra per esempio, dei veri *house's keeper*, passanti il loro tempo, ad andare in tutte le parti della scuola, sorvegliando il fabbricato, chiudendo od aprendo le porte e le finestre, pulendo le grandi sale di riunione dopo ciascuna

²⁷ Cordoni, *Gli edifici scolastici della città di Genova*, cit., p. 211.

²⁸ *Ibid.*, p. 213.

²⁹ *Ibid.*

ricreazione, stabilendo delle correnti d'aria pura allorché gli allievi hanno lasciato la classe, nettando i lavatoi ed i cessi ecc. ecc. Gli inservienti, nei paesi latini, salvo le debite eccezioni, preferiscono chiudersi nella loro stanza di riposo dedicandosi ad una immobilità quasi da Fakiro³⁰.

Tutte difficoltà che potevano essere superate pensando ai risparmi: la divisione orizzontale permetteva di avere una sola palestra utilizzabile alternativamente dalle due scuole. Il costo finale di £ 280.22,89 paragonato a quello dei precedenti edifici dava ragione a questo calcolo ed appariva modesto soprattutto considerando le dimensioni della scuola.

Criteri identici vennero seguiti per la scuola di corso Firenze che doveva ospitare la maschile «Emanuele Celesia» e la femminile «Maria Mazzini» e far fronte al rapido sviluppo di una zona della «Circonvallazione a monte» sovrastante il centro della città. Anche qui fu preferito il sistema di divisione verticale: il lungo parallelepipedo della scuola (m 85,65 x 15,10) di fatto era costituito da due fabbricati, uno per i maschi, uno per le femmine, legati da un salone centrale destinato alla ginnastica, alle esercitazioni a classi riunite ed alla ricreazione al coperto. Due saloni nelle ali estreme completavano gli spazi di disimpegno coperti; sopra i tre saloni si aprivano altrettante terrazze per la ricreazione all'aria aperta degli alunni del secondo e terzo piano. Il progettista aveva avuto anche qui l'accortezza di collocare tutti i locali accessori (dalla Direzione alle latrine) sul lato posteriore riservando alle sole aule il lato meglio esposto e illuminato. I tre piani dell'edificio, con 20 classi complessive, garantivano le esigenze scolastiche del momento. Il costo fu di £ 279.803,76.

Nel 1893, terminate le scuole di corso Torino, via Spinola e corso Firenze, il Comune di Genova si dedicò alla ristrutturazioni delle vecchie sedi finché nel 1900 non diede inizio alla costruzione di un nuovo edificio per sostituire la scuola «Da Passano» ormai inutilizzabile sia perché troppo vicino al cimitero di Staglieno (non rispettava il limite dei 200 metri fissato dalla legge) sia perché, costruito ad uso di alloggi per gli impiegati della necropoli, aveva ben poco della funzionalità di una scuola. La nuova «Da Passano» venne realizzata sulla sponda destra del torrente Bisagno circa un chilometro prima del cimitero monumentale di Staglieno. Vennero impiegati criteri già sperimentati ma qui ci fu anche l'ambizione di realizzare un'opera esteticamente gradevole, risultato ottenuto con la costruzione di corpi ad altezza variabile capaci di dare vivacità di movimento e con lunghe serie di finestre divise da colonnine. L'ampio spazio antistante suddiviso tra giardino ed orto sperimentale completava un quadro che mitigava l'austerità dell'edificio pubblico con l'eleganza di una villa privata pur mantenendo il rigore dello scopo educativo. Nella realizzazione del progetto si era tenuto conto di quelle intenzioni di educazione estetica che la normativa

³⁰ *Ibid.*, p. 214.

approvava, con misurata cautela, parlando di edifici «di aspetto semplice ma elegante, tale da elevare l'animo ed ingentilire il gusto della scolaresca» (art. 4)³¹.

L'originalità del progetto consisteva in quella che venne definita la «cumulatività»; nelle precedenti costruzioni dovendo tenere separate le scuole maschili da quelle femminili si era obbligati a reduplicare i locali di servizio: due portinerie, due direzioni, due cucine, ecc. Nel nuovo edificio, pur garantendo la separazione dei sessi, era previsto per queste funzioni un unico locale e, soprattutto, un unico addetto. Così gli alunni e le alunne avevano accesso da entrate laterali, a monte e a valle, ma era sufficiente a sorvegliarli un custode collocato in una camera centrale, comune alle due sezioni, da dove poteva anche controllare la grande entrata sulla facciata, riservata ad autorità e parenti degli scolari. La soluzione della «Da Passano» comportava un sensibile risparmio nei costi di costruzione e di futura gestione dell'edificio.

Le aule in numero di 14 erano situate al primo e secondo piano mentre nel terzo, quasi torretta, c'era l'alloggio del custode collegato al piano d'entrata da una piccola scala «servente anche al Direttore per accedere, inavvertito, nei due piani di scuola ed in ambedue le sezioni»³². A monte e a valle due saloni con sovrastante terrazzo erano utilizzati insieme col giardino per la ricreazione e le attività ginniche. Sul lato opposto alla facciata, di contro al muro di sostegno della via retrostante, erano collocati refettori, cucina, sala di direzione, sala di riunione per insegnanti ed altri locali di disimpegno.

Sembra che in questo edificio si sia dato sfogo alle voglie di sperimentazione: la descrizione del sistema di riscaldamento, indispensabile nella valle del Bisagno, una delle più fredde del territorio cittadino genovese, comprendeva il calcolo delle calorie necessarie, la potenza e la tipologia della caldaia e prevedeva un originale sistema di aerazione: una sorta di saracinesca sotto i davanzali delle aule regolava l'afflusso dell'aria fredda che si univa a quella calda generata dalle piastre dei caloriferi. Soluzioni ultramoderne che prevedevano addirittura la possibilità per gli alunni di «bagni a doccia freddi e caldi»: sei ugelli consentivano «24 docce all'ora per i maschi e per le femmine» calcolando «cinque minuti per spogliarsi, cinque per la doccia ed altri cinque per rivestirsi»; né mancava il calcolo del consumo d'acqua: 8 litri al minuto e quindi 40 litri per ogni allievo³³.

Altro tema di scrupolosa ed ampia trattazione fu quello delle latrine, uno degli aspetti dibattuti dall'igiene del tempo. La relazione Cordoni vi dedicava tre pagine concludendo per l'installazione di «cessi alla turca» secondo il sistema del francese Mangelot, considerato più igienico di quello a sedile perché – rassegnato l'autore osservava – «Nelle scuole e negli stabilimenti pubblici i cessi a sedile si usufruiscono come quelli alla turca montandovi sopra ed

³¹ *Ibid.*, p. 191.

³² *Ibid.*, p. 230.

³³ *Ibid.*, p. 229.

accoscina dovissi. Una posizione diversa, dato lo stato cui le latrine pubbliche si trovano, riesce impossibile»³⁴. Il costo complessivo dell'edificio fu di £ 140.000.

Tra i locali di fortuna delle Scuole di carità e quanto offriva la «Da Passano» non c'è solo un'edilizia che scopre la specificità della scuola: c'è un'edilizia impegnata a inventare risposte alle domande sollevate dal dibattito pedagogico e imposte dalla sensibilità dei tempi. Quando la scuola era un luogo dove apprendere a compitare e a scrivere il proprio nome qualsiasi stanzaccia poteva andar bene, anche un cadente oratorio, ambienti che non erano più adatti ed anzi diventavano controproducenti quando si voleva che dalla scuola uscissero i nuovi cittadini capaci non solo di leggere, scrivere e far di conto, ma di far propri valori e comportamenti di quella borghesia che stava imponendo il suo stile di vita a modello dell'intera società.

È ormai cessato il tempo in cui si stimava sufficiente una camera di forma comune per servire di scuola ed hanno di scuola un concetto ben ristretto coloro che la credono destinata unicamente ad impinguare la memoria di cognizioni qualunque siansi, senza cercare se siano intese o no. Essa ha per iscopo l'educazione di tutta la persona umana la quale, oltre l'intelligenza, possiede molte altre potenze, come sono il volere, fondamento di quella insigne prerogativa che è il carattere, l'immaginazione, il senso interno. A questo bisogna aggiungere le facoltà fisiche che sono più collegate coll'organismo, come le funzioni vitali, il sentire e le attività che ne derivano. Tutte queste forze esercitano fra di loro una reciproca influenza, e nessuna deve essere trascurata dallo educatore degno veramente di questo nome. Apparisce chiaro quindi quanto un locale abbondante di aria e di luce, spazioso, corrispondente alle odierne prescrizioni dell'igiene, adatto al mantenimento della disciplina, sia il requisito principale per una buona educazione³⁵.

Le regole edilizie davano forma a un edificio scolastico che tendeva a realizzare le indicazioni dei pedagogisti; la struttura che ne nasceva finiva a sua volta per influenzare la visione pedagogico-didattica. Agli effetti educativi non era indifferente per lo scolaro salire marmorei gradini d'una imponente scalea, entrare in un edificio di maestosa severità, essere circondato da spazi ampi e trovarsi in mezzo a cinquanta compagni in aule e cortili di inusitata ampiezza. Né era senza effetto muoversi tra suppellettili funzionali e materiale didattico strutturato che inevitabilmente indirizzavano il suo modo di pensare e di agire³⁶.

³⁴ *Ibid.*, p. 225.

³⁵ *Ibid.*, p. 234.

³⁶ Cattedre con relative predelle e banchi furono i mobili che attirarono l'attenzione di pedagogisti e di fornitori di oggetti scolastici. Il *Primo opificio nazionale di attrezzi per ginnastica, giochi e sport banchi e arredi scolastici* del Cav. Prof. Giuseppe Pezzatossa, Bari, 1902, Tip. Gis. Laterza e Figli, ispirandosi alle pagine del *Dizionario illustrato di Pedagogia* di Martinazzoli e Credaro, proponeva una tipologia di banchi adatti ad ogni situazione (biposto, monoposto, con sedile fisso, modificabile, con pedana fissa, mobile, senza pedana, banchi adatti ad eseguire esercizi ginnici ed anche a «lavori donneschi»; un modello per asili, il «banco-branda», aveva sedili inclinabili simili a culle). C'erano calamai «irreversibili» con sifone per versare l'inchiostro, lavagne, «crocifissi artistici in cartapesta». L'elenco «degli attrezzi di ginnastica, giochi e sport

I progettisti erano pienamente consci che il loro manufatto inclinava a ispirare sentimenti di ammirata subordinazione per l'ordine costituito e di accettazione timorosa del principio d'autorità. Che altro poteva significare, ad esempio, la nota sulla collocazione strategica dell'ingresso nell'aula che l'ingegner Cordoni riportava nella sua relazione? «La porta d'entrata è disposta in modo tale che gli allievi devono passare avanti la cattedra dell'insegnante per raggiungere i loro banchi»³⁷.

Né influenza minore l'architettura dell'edificio e l'organizzazione degli spazi esercitavano sugli insegnanti, anch'essi sottoposti al reverenziale rispetto per la monumentalità dell'ambiente e al timore di un'autorità che poteva comparire inaspettata³⁸.

Architettura e pedagogia avevano trovato sintonia di intenti: la prima aveva fatto proprie esigenze didattiche della seconda e quest'ultima aveva accolto le possibilità e i limiti imposti dall'uso dei materiali e dai vincoli economici, ambedue concordi – con singolare scambio di ruoli per cui l'ingegner Cantoni disquisiva di didattica e il pedagogista Martinazzoli e Credaro davano consigli di edilizia – nel volere un contenitore adatto a formare il futuro suddito del nuovo Stato nazionale.

Fabbriche scolastiche. È compito dell'architetto, nella redazione del progetto di un edificio in genere, di avere anzitutto di mira lo scopo a cui viene destinato, curando che il numero, la distribuzione, l'orientazione, le dimensioni dei locali che lo compongono, i materiali e gli apparecchi da impiegarsi nella costruzione concorrano a questo scopo, in modo che il fabbricato, ad opera compiuta, possa corrispondervi il meglio possibile. Tanto più gelosa deve essere tal cura trattandosi di fabbriche scolastiche, giacché a niuno può sfuggire quanto la buona ed opportuna consistenza dell'edificio possa influire a vantaggio della disciplina, della didattica e dell'igiene e come importi che tutto ciò debba venir conciliato con una rigorosa economia³⁹.

e degli strumenti di antropometria per istituti educativi, società ginnastiche e sportive e per il R. esercito e la R. marina» comprendeva tutto il possibile armamentario del settore assimilando le esigenze della scuola a quelle della caserma.

³⁷ Cordoni, *Gli edifici scolastici della città di Genova*, cit., p. 189.

³⁸ La possibilità per il Direttore di spostarsi non visto per l'edificio e di comparire all'improvviso aveva evidenti scopi di controllo, condivisi dalla scuola e da istituzioni dove la sorveglianza era ritenuta ingrediente indispensabile al buon funzionamento della struttura. È ancora Giuseppe Banchemo a ricordare che misura analoga era prevista nel manicomio cittadino: «Una scala segreta nell'ingresso di ciascun raggio conduce non visti ad ogni piano», *Genova e le due Riviere*, cit., p. 122.

³⁹ *Dizionario illustrato di pedagogia*, diretto dai professori A. Martinazzoli e L. Credaro, cit., Vol. I, p. 583.

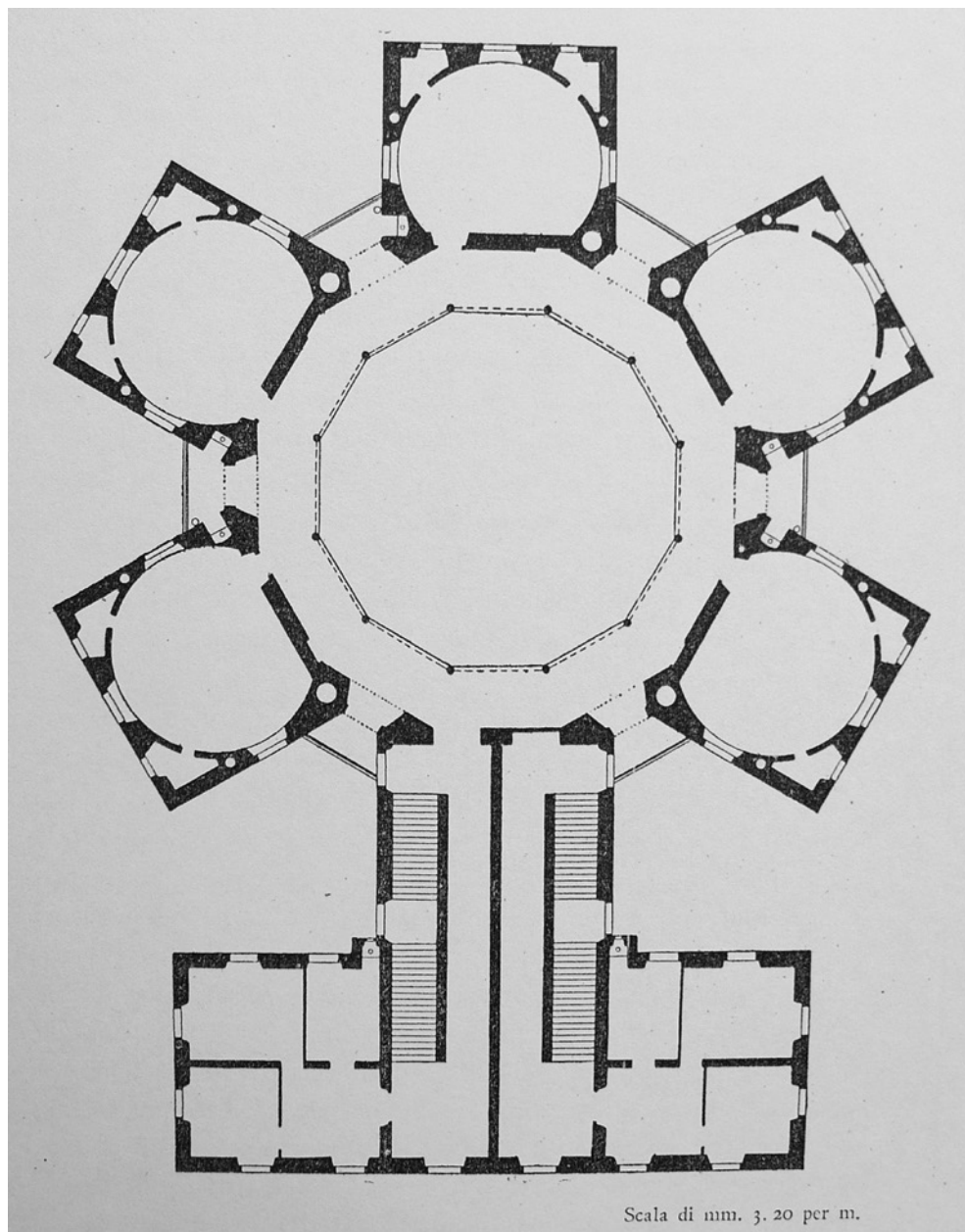


Fig. 1. Pianta della scuola Gabriello Chiabrera (1873) che riproduce la struttura adottata per carceri e per i manicomi.

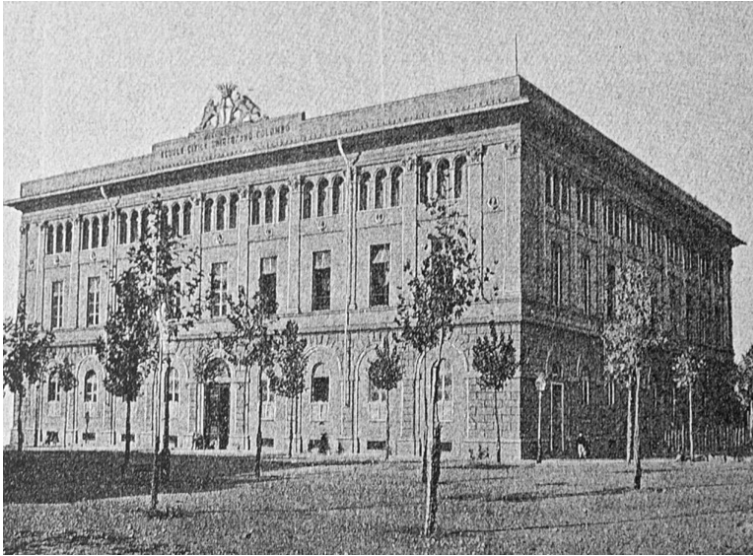


Fig. 2a. Prospetto della scuola in corso Torino (1893) dove era stata adottata la soluzione di divisione per piani orizzontali destinandone uno alla maschile “Cristoforo Colombo” e l’altro alla femminile “Orietta Doria”.

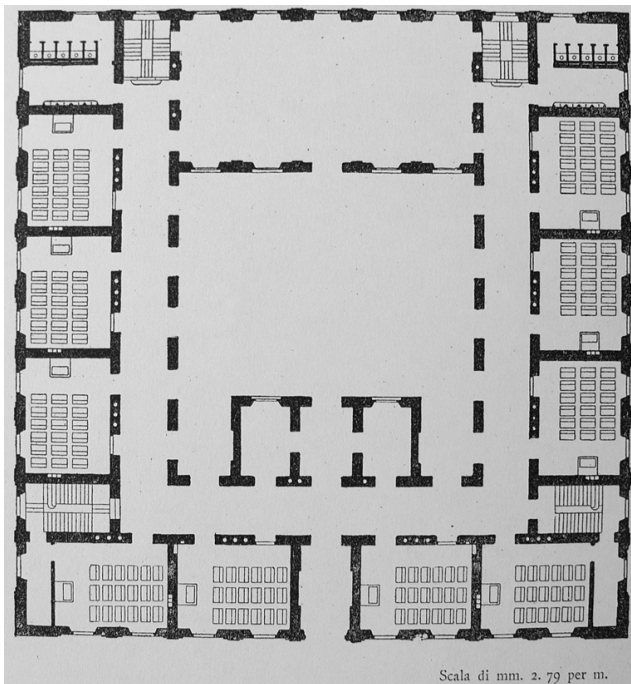


Fig. 2b. Pianta del primo piano della scuola di corso Torino.

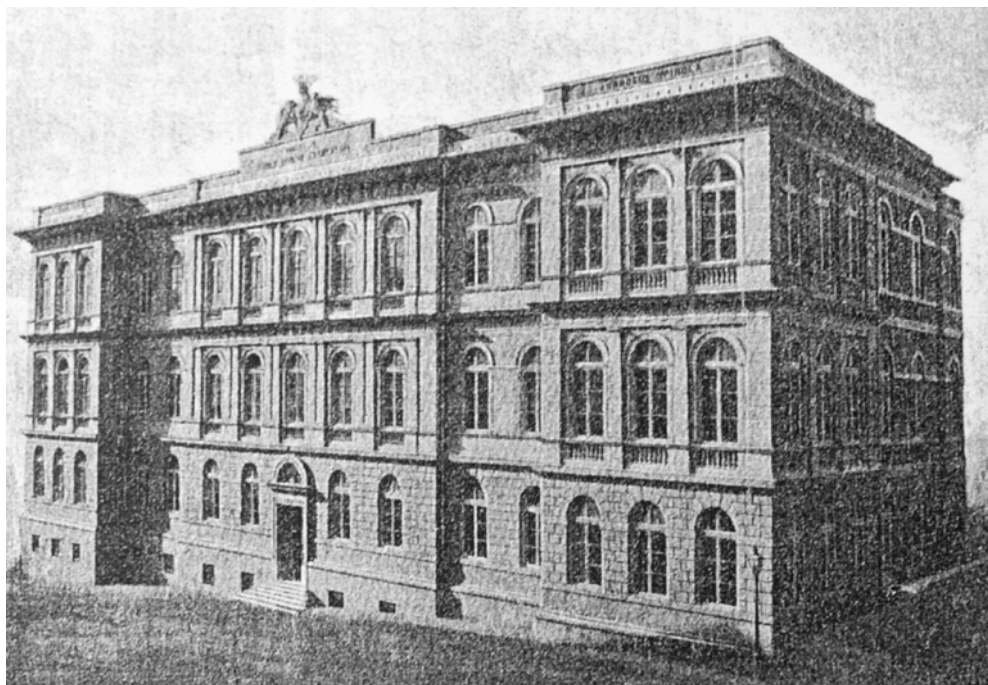
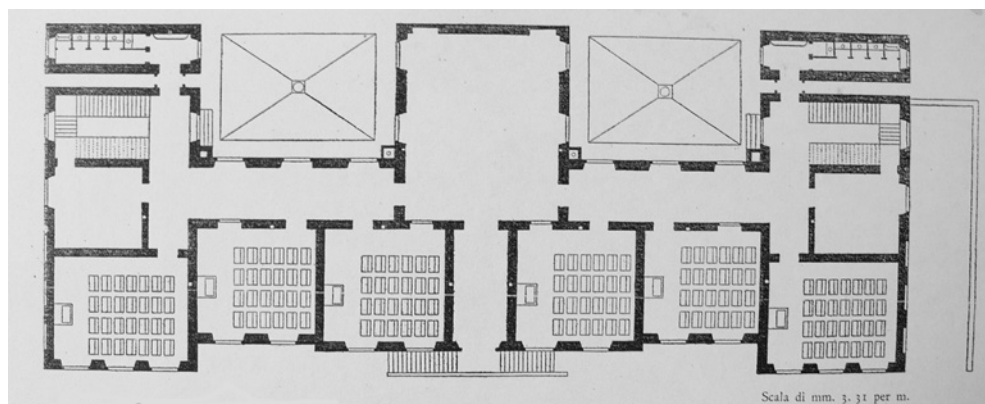


Fig. 3a. Prospetto della scuola in via Ambrogio Spinola (1893) dove era stata adottata la soluzione di divisione verticale: nel corpo a nord la scuola maschile “Ambrogio Spinola”, in quello a sud, meglio esposto, la femminile “Eleonora Ruffini”.



Scala di mm. 3, 31 per m.

Fig. 3b. Pianta del piano terreno della scuola della scuola in via A. Spinola.



Fig. 4a. La scuola “Gerolamo Da Passano” (1899) in una foto del primo Novecento. All’eleganza dell’edificio si univano soluzioni logistiche originali come la cumulatività. La disposizione dei locali, pur mantenendo alle due sezioni (maschile e femminile) quella assoluta indipendenza fra di loro “che la morale consiglia e i regolamenti impongono”, permetteva di avere una sola portineria, una sola gabbia di scala, una sola cucina ed un’unica direzione.

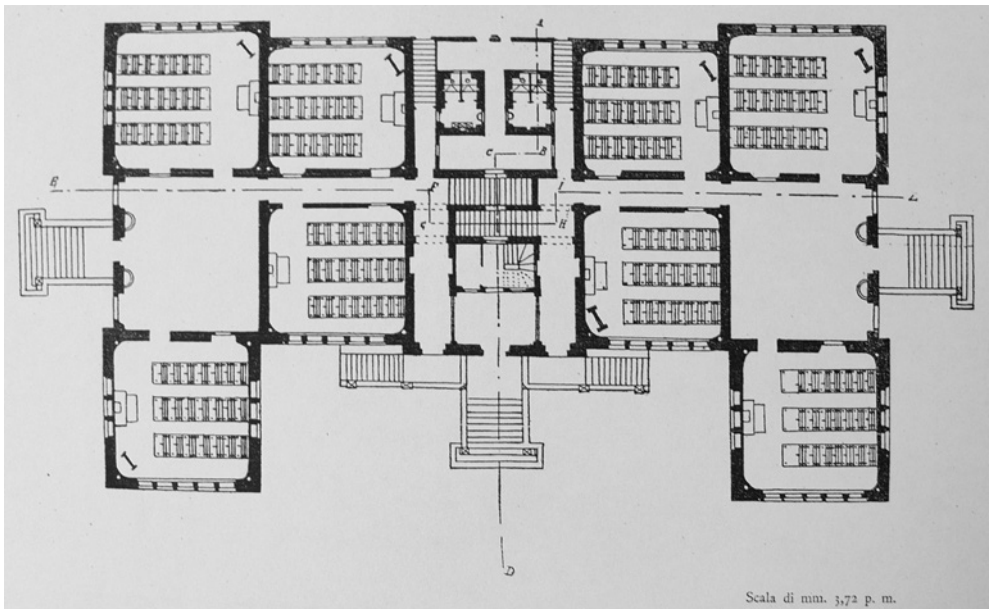


Fig. 4b. Pianta della scuola “Da Passano”.

«With the love of a father, with the understanding of a mother». The figure of Father Giuseppe Vavassori (1888-1975): his educational and formative values

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ABSTRACT: Father Giuseppe Vavassori, affectionately known as Don Bepo, was a figure of some importance in Northern Italy and in particular in the local Church and city of Bergamo from the 1930s up to the 1970s. Parish priest to mountain communities, First World War chaplain, spiritual director of the seminary and director of the daily newspaper «L'Eco di Bergamo», in 1927 Fr. Vavassori founded the Patronato San Vincenzo, a charitable institution inspired by the educational model of don Bosco, with the aim of providing a home for disadvantaged, abandoned or orphaned children and youths. The charity houses set up by Don Bepo at various locations across the city and province of Bergamo, in Sanremo (Italy) and Bolivia, still today continue to receive large numbers of youth and in general to assist those who are most in need.

EET/TEE KEYWORDS: Child Protection; Youth Welfare; Italy; XX Century.

Introduction

Father Giuseppe Vavassori, affectionately known as Don Bepo, was a figure of some importance in Northern Italy and in particular in the local Church and city of Bergamo from the 1930s up to the 1970s. Parish priest to mountain communities, First World War chaplain, spiritual director of the seminary and director of the daily newspaper «L'Eco di Bergamo», in 1927 Fr. Vavassori founded the Patronato San Vincenzo, a charitable institution inspired by the educational model of don Bosco, with the aim of providing a home for disadvantaged, abandoned or orphaned children and youths. The lives of over

50,000 young people have been touched by the charity and compassion of this priest: the houses set up by Don Bepo at various locations across the city and province of Bergamo, in Sanremo (Italy) and Bolivia, still today continue to receive large numbers of youth and in general to assist those who are most in need.

Nonetheless, almost forty years after Fr. Vavassori's death, the history of his charitable work, carried out against the background of a difficult historic period marked by significant social, political and economic change, has yet to be adequately studied and analyzed, while much also remains to be done in terms of investigating his educational work and methods and his spirituality¹. A critical overview of works and documents about Don Bepo² may therefore allow us to gain insight into the educational vision that drove his existence and which he implemented in his untiring efforts to rescue youths in difficulty and improve their human and social condition.

In the current paper, I set out to shed light on the figure of Don Bepo by focusing on the educational and formative values that he promoted and by identifying the guiding principles of his educational method, which included providing care underpinned by trust and hope, listening attentively to young

¹ Studies on Fr. Vavassori are still very scarce, and the few that have been conducted are mainly hagiographic in nature: G. Lonngo, A. Nodari S. Vavassori, *50.000 lo chiamano Padre*, Bergamo, Edizioni Il Conventino, 1977; Patronato San Vincenzo (ed.), *Don Bepo 1888-1975*, Bergamo, Sesab Editrice, 2005; M. Campagnoni, *Don Giuseppe Vavassori*, Bergamo, s.n., stampa 2007. For a recent contribution, see E. Mazzella's entry in *Dizionario Biografico dell'Educazione 1800-2000*, Vol. II, 2013, p. 632.

² In November 2006, the Opera Diocesana Patronato San Vincenzo of Bergamo approved the setting up of a *Centro Studi Don Bepo Vavassori*, responsible for collecting and electronically storing all the available sources on the life and works of Father Giuseppe Vavassori. The aim of the *Centro Studi* was to promote the study, conservation, publication and scientific use and dissemination of the documents regarding Don Bepo, with a view to advancing understanding of and reclaiming his spiritual, charitable and educational contribution. From March to October 2007 the Patronato San Vincenzo did up and equipped the rooms of the *Centro Studi*, which was technically operative from October 2007 to February 2010. The author of the present article, in her role as researcher at the *Centro*, coordinated the collection, concluded in December 2009, of the most significant documents regarding Father Vavassori and his educational work. The documents retrieved and organized with the help of an archivist in the employ of the Diocese of Bergamo, are currently held at the *Centro Studi Don Bepo Vavassori* in 61 boxes and 154 registers, along with 47 boxes containing photographic material, and eight video-tapes and nine DVDs on which the oral and audio-visual sources are stored. In addition, between December 2009 and February 2010, the *Centro Studi* used its collection of oral and audiovisual sources to produce a documentary on Don Bepo and his educational work. The documentary was presented to the Patronato San Vincenzo and broadcast by *Bergamo TV* on 5 February 2010 to mark the 35th anniversary of the death of Don Bepo. On completion of the research phase, the author of this paper presented the Board of the Opera Diocesana Patronato San Vincenzo of Bergamo with a detailed proposal for a critical publication of Don Bepo's writings, with a view to making known his specific and authentic contribution as an educator as it developed in the course of his many charitable works as a priest. Due to the subsequent closure of the *Centro Studi* implementation of this project has not been initiated to date.

people, displaying true concern for the situation of every individual and bearing witness by giving unconditional love to all³.

1. *The life of Giuseppe Vavassori*

Giuseppe Vavassori was born on 19th July 1888 in Osio Sotto, near Bergamo. His family played a key role in his upbringing, particularly his mother Caterina, his sister Margherita and his Aunt Bepa, from whom Giuseppe learnt the value of mutual help, of loving one's neighbour, and of devoting oneself to the most vulnerable. As we shall see, his early experiences and the loving family environment he grew up in, exerted a constant influence not only on his ministry as a priest but on his educational work as a whole.

On finishing primary school, Giuseppe informed his parents that he wished to become a priest. Although the family did not have sufficient means to pay for his studies, with the help of Father Luigi Carminati and two of the child's aunts, they managed to raise the required sum. Giuseppe entered the diocesan seminary in Bergamo on 4th November 1900, at only 12 years of age. On 25th July 1912 he was ordained to the priesthood by Monsignor Giacomo Maria Radini Tedeschi, whose secretary was Father Angelo Roncalli, the future Pope John XXIII, and a friend of Don Bepo's since his early years at the seminary⁴.

From August 1912 to May 1916, Father Vavassori served as parish priest of Branzi and Trabuchello. Alongside his pastoral work in those years, he also produced the fortnightly newsletter *L'Alta Valle Brembana*⁵, of which he was

³ Given that the archives have no longer been accessible since February 2010, the current paper is based on those sources that I had the opportunity to consult while working at the *Centro* as well as on the inventory of the sources compiled by the archivist.

⁴ Father Vavassori always maintained a relationship of profound esteem and cordial friendship with Roncalli. The Bergamo pontiff's secretary, Monsignor Loris Capovilla, recalls that immediately after his election, Pope John XIII «wished straight away to honor, amongst others, Bergamo's apostle of charity, that perseverant, dynamic and courageous gatherer of sheaves in God's field». Patronato San Vincenzo, *Don Bepo 1888-1975*, cit., p. 31. When in 1962, Pope John XXIII called and opened the Second Vatican Council, Don Bepo expressed his support; amongst his writings there is a note linking the day-to-day activities of the Patronato with the Council sessions: «With some pride and a hint of cheekiness we dare to affirm that Our Lady of the Council is also our own Our Lady. Therefore running through our blood we feel a certain kinship with the Council Fathers, including those with black skin», *ibid.*, p. 125. The documents concerning the relationship between the priest and the pontiff, which are held at the *Centro Studi Don Bepo Vavassori*, have yet to be analyzed; nonetheless a preliminary reflection on the two figures may be found in a 2002 interview with Monsignor Andrea Spada. Cfr. *ibid.*, pp. 193-206. On Roncalli see L.F. Capovilla (ed.), *Giovanni XXIII. Il Giornale dell'anima*, Cinisello Balsamo, Edizioni San Paolo, 2000; M. Benigni, G. Zanchi, *Giovanni XXIII: biografia ufficiale*, Cinisello Balsamo, Edizioni San Paolo, 2000.

⁵ The newspaper «L'Alta Valle Brembana» was founded in 1912 by Mons. Giovanni Boni with the help of Mons. Luigi Drago. Initially the newspaper was circulated monthly but it soon

to become director from 1921 to 1925. During the last-mentioned period in particular, he made major changes to the newspaper making it much more journalistic in style: the number of regular columns, opinion and information articles increased, while the graphics were enhanced to make the publication more attractive to its readership. Given that the newsletter was the only source of information for most of the valley's population, Don Bepo decided to include an overview of the main events happening in Italy and in the world, providing frequent in-depth analyses to complement this service. The new line taken by the newspaper was also reflected in its open support for Father Luigi Sturzo's Partito Popolare, the party's programme and the local branches which were being set up in the valley. When Mussolini came to power, the newspaper found itself in a difficult position: it was inevitably required to appear to be supportive of the Duce, though this support was voiced without enthusiasm using conventional set phrases; until freedom of the press was finally fully suppressed, the newsletter continued to clearly condemn fascist violence and criticize the use of antidemocratic methods.

In May 1916 Father Vavassori was called up: he spent his first year in the army at medical camps and military hospitals⁶, while in February 1918, as Lieutenant Chaplain, he was sent to the French front where he took part in the Battle of Bligny. Don Bepo was one of the few survivors from his regiment, which was practically wiped out in July 1918. The priest was later to write: «before all those dead, I felt ashamed to have been left among the living»⁷. On 14th July 1927, Don Bepo recorded his memories of the Battle of Bligny, which he described as «the most tragic date of my life»⁸ in one of the few signed articles that he wrote for «L'Eco di Bergamo», of which, as we will later discuss, he was then editor and shortly to be appointed director. When he was discharged from the army in late 1920, Father Vavassori returned to Bergamo with a vision of a humanity in suffering, but above all of youths forced to spend their lives behind barbed wire, images that he often shared with the young people he worked with to encourage them not to waste their lives. He described a young friend of his who had perished in the Battle of Bligny in the following terms: «He so loved life, joy. He spoke of nothing else, he was

became a fortnightly publication. With the subtitle of Fortnightly Newsletter of the Three Vicarie, it was directed by Mons. Boni aided by a strong network of correspondents in the upper valley. In 1911, Mons. Boni put Don Bepo, his enthusiastic and capable assistant, in charge of running the paper. Don Bepo succeeded him as director from 1921 to 1925.

⁶ Father Vavassori's war journal (10 March 1917-16 February 1918) is currently held at the *Centro Studi Don Bepo Vavassori*, box. 2, file 2 (henceforth *Centro Studi*, b., f.). The journal was transcribed by his niece Silvana Vavassori, and checked against the original and stored electronically by the author of the present paper. Excerpts from the journal were published in Longo, Nodari, Vavassori, *50.000 lo chiamano Padre*, cit. The *Centro Studi Don Bepo Vavassori* also houses the *Ricordi della vita militare. Centro Studi*, b. 13, f. 4.

⁷ Longo, Nodari, Vavassori, *50.000 lo chiamano Padre*, cit., p. 53.

⁸ *Ibid.*, p. 54.

entirely focused on the pleasure of living. It was all over in a split second, what sorrow as I held his bloodied head between my hands»⁹. After his dramatic experience at the war front, amongst the many youths and friends who had perished there, Don Bepo particularly wished to bear homage to his fellow priest Father Giuseppe Canova, killed in the Tonale area in 1918. As testified by his closest collaborators, over 1919 and 1920 Father Vavassori worked on the writing of the booklet *In memoria di Don G. Canova*, published on 10th August 1920, with a preface by Angelo Roncalli¹⁰. Don Bepo's experience as a military chaplain had given him the opportunity to become deeply familiar with the soul, generosity and – above all – the great faith of Italian youth. The years of the First World War were valuable, fertile and spiritually enriching for him. Similarly to Roncalli, who held the rank of medical sargent before becoming a lieutenant chaplain in 1915, Don Bepo too gained great insight into the human soul thanks to his war experiences; having been personally exposed to the atrocities of conflict, as was later to happen to don Gnocchi, endowed Father Vavassori with greater strength to carry out his priestly ministry and above all inspired his later educational work with disadvantaged youth¹¹.

⁹ *Ibid.*, p. 56.

¹⁰ *In memoria di don Giuseppe Canova*, with an introduction by Angelo Roncalli, Romano di Lombardia, Tipografia Rubini, 1920.

¹¹ As had been the case in France from the beginning of the conflict, in Italy too the Great War fostered a sort of tacit and spontaneous reconciliation between Catholics and the Nation State. The readmission of military chaplains to the army – approved on the eve of Italy's intervention in the war with a view to offering religious assistance to the soldiers at the front – both contributed to and reflected this reconciliation. A figure who was most active in promoting the reconciliation between Catholicism and patriotism throughout the entire war was Father Agostino Gemelli, in his multiple roles of medical doctor, priest and scholar of the psychology of soldiers. Gemelli rejected the accusation of antipatriotism directed at Catholics, claiming the right for them to participate in the life and greatness of the homeland according to their own political, social and religious beliefs. Many famous names in the history of the Italian Church served as army chaplains during the two world wars: for example, Father Carlo Gnocchi, Father Giulio Facimbeni, Father Primo Mazzolari, Father Giovanni Minzoni, later murdered by the fascists, Father Aldo Del Monte, bishop of Novara and responsible for the renewal of catechesis in Italy, and Angelo Roncalli, the only military chaplain who later went on to become a pope. The chaplains' testimonies (as recorded in their diaries and letters), sources which have recently been a focus of great interest within historical research on the Church and the war, not only point up the key role played by religion during the conflicts in motivating the soldiers and offering support to the population, but also provide us with an in-depth and moving account of the soldiers' lives and suffering. On military chaplains and the role played by the Church during the world wars, cfr. R. Morozzo della Rocca, *Cappellani militari nella prima guerra mondiale*, Torino, Loescher, 1979; P. Mazzolari, *Quasi una vita. Lettere a Guido Astori (1908-1958)*, a cura di G. Astori, Bologna, Edizioni Dehoniane, 1979; F. Malgeri, *La Chiesa italiana e la guerra (1940-1945)*, Roma, Edizioni Studium, 1980; L. Bruti Liberati, *Il clero italiano nella grande guerra*, Roma, Editori Riuniti, 1982; G. Cosmacini, *Gemelli*, Milano, Rizzoli, 1985, pp. 153-154; G. Rumi (ed.), *Benedetto XV e la pace, 1918*, Brescia, Morcelliana, 1990; M. Franzinelli, *Il riarmo dello spirito. I cappellani militari nella seconda guerra mondiale*, preface by E. Balducci, Treviso, Pagus Edizioni, 1991; L. Panena, *Don Primo Mazzolari: cappellano alpino volontario*, Supplement to «Provincia Nuova», Cremona, 1993; D. Menozzi F. Malgeri, *La Chiesa, i cattolici e la prima guerra mondiale*, in *Storia*

On his return to Bergamo, on 5th February 1921 Father Vavassori was assigned to the parish of Olmo al Brembo. In November 1925, Bishop Marelli appointed him spiritual director of the seminary in Bergamo, a role that he kept until January 1927, when he became editor of «L'Eco di Bergamo» before directing it from 1930 to 1931¹². In 1926 he also began to take an interest in the youths of the *Patronato San Vincenzo per giovani operai*, founded in 1909 by Count Felice Colleoni¹³, then at a very low ebb. In 1927 Don Bepo became director of the Patronato and on 14 October of the same year moved it to a new site in Via Conventino (now Via Gavazzeni). Despite the considerable effort he was devoting to the Patronato, which was fast expanding¹⁴ (see Table 1), Father Vavassori took on still further duties and responsibilities. During the 1930s he was chaplain to Bergamo Psychiatric Hospital and to the Sant'Agata prisons, while from 25th July 1943 he took up a position as Chairman of the Provincial Committee of the Red Cross.

During the Second World War years, Don Bepo stayed very close to the youths who left for the front: he kept up an intense personal correspondence with them and opened a column in the *Bollettino del Patronato* entitled «Cronache grigioverdi», through which he continued to dialogue with his young men who

dell'Italia religiosa, Vol. III: *Letà contemporanea*, a cura di G. De Rosa, Roma-Bari, Laterza, 1995, pp. 189-222; D. Menozzi, *La cultura cattolica davanti alle due guerre mondiali*, in G. Rochat (ed.), *La spada e la croce. I cappellani italiani nelle due guerre mondiali*, in «Bollettino della Società di Studi Valdesi», vol. CXI, n. 176, 1995, pp. 28-60; P. Mazzolari, *Diario, I: 1905-1915*, a cura di A. Bergamaschi, Bologna, Edizioni Dehoniane, 1997; C. Ghizzoni, *Educazione e scuola all'indomani della Grande Guerra. Il contributo de «La Civiltà Cattolica» (1918-1931)*, Brescia, La Scuola, 1997, pp. 19-35; R. Carletti, *Lettere di una grande amicizia: il cappellano militare Annibale Carletti a don Primo Mazzolari. La sua vicenda umana e sacerdotale (lettere dal 1908 al 1920)*, Rivolta d'Adda, Editrice Confronti, 2000; Capovilla (ed.), *Giovanni XXIII. Il Giornale dell'anima*, cit.; L. Pazzaglia (ed.), *Chiesa, cultura e educazione in Italia tra le due guerre*, Brescia, La Scuola, 2003; A. Del Monte, *La croce sui girasoli*, Bologna, EDB, 2008; C. Gnocchi, *Cristo con gli alpini*, Milano, Mursia, 2009; G.P. Agnini, *Don Carlo Gnocchi alpino cappellano*, Milano, Mursia, 2011; P. Chiesa, *Dio e patria: i cappellani militari lombardi nella seconda guerra mondiale*, Milano, Mursia, 2011. See also the proceedings of the recent conference *Religione, clero e Grande Guerra: articolazioni territoriali e confessionali*, Università Cattolica del Sacro Cuore di Brescia, 31st March-1st April 2014.

¹² On Father Vavassori's collaboration with «L'Eco di Bergamo» see C.L. Bottini, *L'eco di Don Bepo. Valori formativi, spiritualità e apostolato di don Giuseppe Vavassori nelle pagine de L'Eco di Bergamo (1929-1932)*, Undergraduate thesis, academic year 2012-2013, Università Cattolica del Sacro Cuore di Milano, Supervisor: Prof. S. Polenghi.

¹³ The Patronato San Vincenzo per Giovani Operai was founded in April 1909 by the Conferenze di San Vincenzo in accordance with the wishes of its first chairperson, Count Felice Colleoni. Its aim was to provide a point of reference and accomodation for young workers who had moved to the city to take up employment there. The first group was set up at the Oratorio dell'Immacolata under the direction of Father Guglielmo Scattini, and later based at the Orphanage in Via Santa Lucia. After three years it moved to the Carmelite Convent in the Upper City. The new site was distant from the main centers of employment and therefore the number of residents rapidly decreased.

¹⁴ The twelve young men present in January 1928 had increase in number to 60 by the end of the same year, to 120 in 1929, 580 in 1938 and 1,000 in 1949.

had been called to arms. During the Nazi Occupation, the Patronato and other institutions in Bergamo sheltered Jewish children, numerous partisans and politicians of all affiliations. The circumstances in which the institutions found themselves drove the creation of a de facto aid network: the houses of S. Paolo d'Argon, S. Brigida and Endine Gaiano, which belonged to the Patronato San Vincenzo, the Opera Bonomelli, on the initiative of Father Agostino Vismara¹⁵, director of the Red Cross, the Istituto Don Luigi Palazzolo and the orphanage at Torre Boldone, whose chaplain and director was Father Tranquillo Dalla Vecchia, were some of the religious institutions at which not only disbanded soldiers and fugitives but also young men who had failed to report for military service and deserters received material aid, food and clothing, before hiding out or being sent, through Valtellina, into Switzerland¹⁶. The increased influx of victims of political persecution into the houses of the Patronato led to the

¹⁵ Agostino Vismara (Spirano 1890-Bergamo 1967) was ordained to the priesthood in 1914. After working at the Angelo Maj boarding school in Clusone and at the Istituto Dante Alighieri in Bergamo, in 1923 he became director of the Opera Pia Bonomelli which had been set up with the aim of providing assistance to emigrants, by helping starving families to move to and find work in France. When the Opera Bonomelli was taken over by the Fascist Party, Father Vismara was dismissed on account of his opposition to the regime. From 1926 to 1947 he devoted himself to supporting missionary works. From 8 September 1943, in his capacity as director of the Italian Red Cross, he provided food, clothing and economic assistance to disbanded soldiers and prisoners of war that had escaped from the concentration camp in Grumellina, as well as helping the politically persecuted and Jews to cross into Switzerland. On 24 November 1943 he was arrested by the Nazis and repeatedly tortured. After being extensively interrogated in October 1944, without receiving any trial, he was dressed in the uniform of a convict who had been given a life sentence and was sent to the forced labor camps of Mathausen and Dachau. After the war, he held positions as city councilor, administrator of the Bergamo Ente Comunale di Assistenza and director of the Secretariat for Diocesan Pilgrimages. Cfr. G. Bertacchi, A. Buttarelli, L. Vismara (edd.), *Le carte di una vita. Il fondo don Agostino Vismara*, Bergamo, Il filo di Arianna, 1994; V. Di Stefano, *Agostino Vismara e l'Opera Bonomelli a Bergamo*, Undergraduate Thesis, academic year 2004-2005, Università degli Studi di Milano, Supervisor: Prof. E. Bressan.

¹⁶ Cfr. A. Pesenti (ed.), *Adriano Bernareggi. Diario di guerra (settembre 1943-maggio 1945)*, Roma, Studium, 2013, pp. 26-27. See also A. Vajana, *Bergamo nel ventennio e nella resistenza*, Bergamo, Ed. Orobiche, 1957; G. Belotti, *I cattolici di Bergamo nella Resistenza*, 2 vols., Bergamo, Minerva Italica, 1977-1978; A. Pesenti, *I contrasti tra il fascismo e la Chiesa nella diocesi di Bergamo negli anni 1937-1938*, in P. Pecorari (ed.), *Chiesa, Azione cattolica e fascismo nell'Italia settentrionale durante il pontificato di Pio XI (1922-1939)*, Milano, Vita e Pensiero, 1979, pp. 539-541; Malgeri, *La Chiesa italiana e la guerra (1940-1945)*, cit.; A. Spada (ed.), *Gli anni e i giorni: antologia da L'Eco di Bergamo*, 2 vols., Bergamo, SESA, 1988; G. Vecchio, *Il laicato cattolico italiano di fronte alla guerra e alla Resistenza: scelte personali e appartenenza ecclesiale*, in G. De Rosa (ed.), *Cattolici, Chiesa, Resistenza*, Bologna, il Mulino, 1996, pp. 251-294; F. Malgeri, *Chiesa, clero e laicato cattolico tra guerra e Resistenza*, in De Rosa, Gregory, Vauchez (edd.), *Storia dell'Italia religiosa*, Vol. 3: *L'età contemporanea*, cit., pp. 301-334, spec. p. 319; G. Formigoni, *Educazione, Resistenza e coscienza cristiana*, in Pazzaglia (ed.), *Chiesa, cultura e educazione in Italia tra le due guerre*, cit., pp. 471-497; G. Vecchio, *Lombardia 1940-1945*, Brescia, Morcelliana, 2005, pp. 438 ff.; R. Amadei, *I cattolici bergamaschi e l'avvento del fascismo*, in Id., *Saggi storici sulla Chiesa di Bergamo nell'Età Contemporanea*, Milano, Glossa, 2010, pp. 345-399.

arrest of Don Bepo. On the night between the 23rd and 24th November 1943, the German police and the Fascists searched the Bergamo house and arrested Father Vavassori. He was held in prison from 24th November to 29th December 1943 and again in January 1944¹⁷. As a number of scholars have pointed out, the support provided by Don Bepo and other priests to the politically persecuted was not based on an anti-fascist stance as much as on the need to absolve their duties as priests and Christians, as indeed had been asked of them by Bishop Bernareggi himself¹⁸. Father Vavassori, recalling his arrest 10 years later, was to write:

In November 1943 our house was going through the most difficult moment of its existence: the storm of the war had struck in full our newborn work, which given its charitable aims thus came to find itself in the front line. Our friends who were being pursued by the police were seeking exile, the escaped soldiers were crying out for the means to live. A warehouse was opened at our house which was officially authorized to collect food for the prisoners in the Grumellina concentration camp, but which was organized so as to get aid to the partisans in hiding in the mountains. It was an extremely dangerous activity but it had to be done; to pull back would have been like putting out the flame that is our life's soul. The holiday camp of Santa Brigida had been kept open after the summer season on the pretext that our children would be safe from the bombings there; but in reality it was a resting place for the escaped prisoners and all those on the run who were trying to reach the Swiss border. We came to be the object of suspicion, reportings, house searches and arrests¹⁹.

Once the war was over the Patronato continued to develop, never having stopped growing even during the armed conflict: over the following years new houses were opened until there were 11 of them altogether, two of which, as we shall see, were launched in Bolivia²⁰ (see Table 1). Immediately after WWII Don Bepo was involved in assisting the refugees, helping Father Agostino Vismara to run the Villaggio XXV Aprile. He also became chaplain to the Sant'Agata prisons in Bergamo. In 1957, he was a member of the *Comitato nuove chiese*²¹

¹⁷ Cfr. *Ricordi dei giorni della mia detenzione in carcere 2 dicembre 1943-5 gennaio 1944*. *Centro Studi*, b. 28, f. 1.

¹⁸ G. Formigoni, *Educazione, Resistenza e coscienza cristiana*, in L. Pazzaglia (ed.), *Chiesa, cultura e educazione in Italia tra le due guerre*, Brescia, La Scuola, 2003, pp. 471-497.

¹⁹ *Centro Studi*, a source that has not yet been recorded in the inventory.

²⁰ To date, we still lack a detailed analysis of the documents relating to the different houses of the Patronato and a complete reconstruction of the history and development of each. Such an investigation would shed even further light on the work and educational projects of Don Bepo. For a general reconstruction see Patronato San Vincenzo, *Don Bepo 1888-1975*, cit. pp. 63-67, 70-71, 73-74, 103-107, 116-120, 132-136.

²¹ The postwar period saw a strong rise in the population of the new districts in Bergamo, leading to a situation whereby there were not enough churches on the ground to accommodate the faithful. In order to address this issue, in 1957 Bishop Giuseppe Piazzi, together with Father Vavassori, the lawyer Suardi and Father Antonio Crippa, set up a *Comitato nuove chiese* [New Churches Committee]. Father Crippa was given responsibility for the legal aspects and Don Bepo for mapping out the geography of the pastoral territory and raising funds. Many documents relative to the meetings of the Committee are held at the Centro Studi. *Centro Studi*, b. 28, ff. 7, 8, 9, 10.

as well as being involved in matters related to the location and reconstruction of Bergamo Seminary²².

Over the years, many refugees were offered hospitality by the Patronato. As we have seen, during the Nazi occupation it took in numerous local antifascists; in 1944 a hundred or so Libyan youths and a similar number of child evacuees from Monte Cassino; at the end of the Second World War Don Bepo sheltered and rehabilitated many under-age fascists; in 1951 a group of flood victims from the Polesine and in 1952 the majority of Father Zeno Saltini's orphans who had been forced to leave Nomadelfia²³; in 1956 the Patronato provided hospitality to a significant number of youths who had fled from Hungary in the wake of the repressed revolutionary movements of that year; finally in the 1970s Don Bepo took in young Eritrean refugees and 200 orphans of work accident victims²⁴.

²² The decision to demolish and rebuild the Seminary on the hill of San Giovanni was announced by Bishop Piazzi on 8th December 1955. The work began in 1962 and was concluded on 5 November 1967 with the inauguration of the new seminary. Research still remains to be done on the documents relative to the rebuilding of the seminary and specifically to Father Vavassori's involvement in the project. For our purposes here it is sufficient to note that the rebuilding of the Seminary had implications for the life of the Patronato and of Don Bepo and that the house in Sorisole hosted the lower secondary school classes from the seminary for some years. Cfr. A. Bellini, *Il colle di San Giovanni. Le vicende della ricostruzione*, Bergamo, SESAAB, 1996.

²³ Zeno Saltini (1900-1981) took a law degree at the Università Cattolica di Milano and in 1931 was ordained a priest. In the following years he decided to provide shelter at San Giacomo Roncole (Modena) for children who did not have families or who had been abandoned, founding the Opera Piccoli Apostoli. In 1947, with a group of other priests, at the former concentration camp of Fossoli, he founded the community of Nomadelfia, a neologism composed of two Greek words that means «where fraternity is the law». Don Zeno's key aim was to take in the numerous war orphans but to offer them a very different type of care to traditional orphanages. Specifically, Nomadelfia was based on a novel concept of family underpinned by the presence and contribution of vocational mothers. Due to intervention on the part of the Church authorities and to financial difficulties, the community was dissolved in 1952 and the majority of the children were assigned to orphanages. In order to have greater freedom to defend himself, don Zeno asked Pope Pius XII to be dismissed from the clerical state. Nomadelfia was refounded in the province of Grosseto. On 22 January 1962 Father Saltini was given permission to resume his ministry as a priest and in the same year Pope John XXIII raised Nomadelfia to the status of parish. On the figure of Father Zeno Saltini see F. Marinetti, *L'eresia dell'amore: conversazioni con don Zeno Saltini*, Roma, Borla, 1999; M. Tagliaferri, *Don Zeno Saltini e il Concilio Vaticano 2*, Brescia, Morcelliana, 2001; L. Caimi, *La formazione dell'«uomo nuovo» nel cattolicesimo italiano del Novecento. Esperienze, figure e problemi degli inizi del secolo al Concilio*, «Annali di storia dell'educazione e delle istituzioni scolastiche», n. 9, 2002, pp. 119-166; R. Rinaldi, *Il profeta di Nomadelfia: don Zeno Saltini*, Cinisello Balsamo, San Paolo, 2008. Cfr. also the entry on Father Zeno Saltini – written by the editors – in *Dizionario Biografico dell'Educazione 1800-2000*, Milano, Editrice Bibliografica, 2013, Vol. II, pp. 459-460.

²⁴ See Campagnoni, *Don Giuseppe Vavassori*, cit., p. 182.

Table 1. *The Houses of the Patronato San Vincenzo*

YEAR	HOME	NOTES
1927	Bergamo Patronato San Vincenzo	Moves to the Lower City with 12 youths on 14 October
1928	Santa Brigida Mountain Summer Holiday Village	
1935	San Paolo d'Argon Home for Primary School Children	
1941	Endine Home for Primary School Children	
1946	Sanremo Vocational School	
1948	Stezzano Institute for the Formation of Priests	
1952	Clusone Vocational School	
1954	Nembro Home for younger children	
1955	Bergamo Villaggio Sposi «Quarter for Young Married Couples/Families»	
1956	Romano di L. Primary and Vocational Schools	In operation for nine years
1959	Sorisole Training Institute	Transferred from Stezzano.
1963	Sorisole Villaggio San Raffaele	The children from Nembro move to the Villaggio San Raffaele
1966	La Paz Mission in Bolivia	
1971	Cochabamba Ciudad del Niño	
1973	Bergamo «Casa del Giovane» [Residential Home for Youth]	

Amongst the educational works launched by Don Bepo, the Villaggio San Raffaele in Sorisole is particularly deserving of attention²⁵. The house in Sorisole was originally the site of a training institute but it was also home to a residential complex for children named after the Archangel Raphael. The village was the fulfillment of Father Vavassori's dream to provide a home for the younger children at the house in Nembro. This is reflected in what he wrote in the Patronato newsletter on 21st July 1963:

the day of the traditional, barracks-like institution for children is almost gone. It is being squeezed to death by the best educational science and by good sense, which is always alive when it is accompanied by a good heart. The modern institutions ever more preemptorily recommend – for the child to be received – the reconstruction of a family as close as possible

²⁵ Cfr. *Centro Studi*, b. 28, f. 6.

to the natural model, many small family groups at the centre of which there is a woman, highly qualified for her lofty mission, who will be the mother²⁶.

Don Bepo's observations were made in the context of the gradual but continuous increase in sensitivity, both in scientific thinking and in Italian politics, regarding the care of minors in situations of difficulty or without families of their own. Don Bepo's proposals, as I discuss later in the paper, were at the cutting edge of Italian education and marked a key transition from a logic of shelter, assistance and impersonal service to a new system based on care, welcoming and education. The Villaggio San Raffaele therefore translated into practice a line of thinking that was then taking hold in Italian public opinion, by launching a residential care centre that emphasized the educational aspects of protecting children and youths in difficulty. The children from Nembro were permanently transferred to the Villaggio San Raffaele between 1963 and 1965²⁷.

In the pages of his everyday diaries, we find clear evidence from the early 1960s onwards, of Don Bepo's strong interest in missionary work²⁸. In 1962,

²⁶ Patronato San Vincenzo, *Don Bepo 1888-1975*, cit., p. 128.

²⁷ A. Debè has drawn similar conclusions in a recent work examining several decades of history of the present-day Azienda Pubblica di Servizi alla Persona «Opere di Servizi Educativi Assistenziali» (OSEA) in Reggio Emilia. Just as we have observed in relation to the Villaggio San Raffaele project, the history of this institution, inspired by Catholic values, was strongly marked by a shift in perspective, from a logic of shelter and depersonalized services to intervention based on care and education. This development reached its peak in 1962, when the orphanages were closed and the modern Villaggio Belvedere was founded. Cfr. A. Debè, *Crescere in un Villaggio. L'OSEA di Reggio Emilia: genesi e sviluppo di un servizio educativo (1951-2012)*, Lecce-Brescia, Pensa MultiMedia, 2013.

²⁸ On 18 December 1960 Don Bepo wrote: «Today Miss Betty Ambiveri told me about a mission on the continent of Africa, and that it might be possible to set up a congregation of the Patronato there. What does the Lord want of me? Quid in senectute mea? Do you want to use me for this, God?» (28 ottobre 1952-14 aprile 1966, *Centro Studi*, b. 2, f. 2). Betty Ambiveri was born in Bergamo on 16 January 1888. After attending the schools of the Marcelline Sisters in Milan, she joined her father in running the family business. During the First World War she became a Red Cross worker, tending to the wounded in the military hospital. After the war, she devoted herself to another of her passionate interests which she was to cultivate for the rest of her life: missionary work. She founded the Laboratorio Missionario and a short time later became president of the Opera Apostolica delle Pontificie Opere Missionarie. Although she was not active in politics, she did not hide her antifascist ideas, which often led her to clash with the authorities, particularly in her role as provincial inspector of the Italian Red Cross. She joined Father Vismara in assisting emigrants through the Opera Bonomelli and when in 1926 the regime blocked his/her/its activities, she devoted herself to working with the elderly. She supported Don Bepo's projects for the Patronato and particularly his missionary work. When the racial laws were passed in 1938, Betty Ambiveri helped many Jewish families. From 8th September 1943 she also helped to protect and advise evacuees and partisans. Arrested after a female collaborator had informed on her, she was detained at S. Agata prison and on 9 March 1944 she was condemned to death by the German court in Bergamo, a sentence that was commuted to 10 years' harsh imprisonment in Germany, thanks to the intervention of Cardinal Schuster and the Bishop of Bergamo Mons. Bernareggi. From her return to Italy on 4th June 1945, she devoted the rest of her life to works of charity. She died on 4 June 1962. For further background on Betty Ambiveri, see D. Borelli, *Tutto questo*

Father Berto Nicoli set out for Bolivia at the request of Pope John XXIII, in order to set up a mission there. On his return from La Paz in 1965, he decided to speak to Father Vavassori about the abandoned youth and the misery of the people in Bolivia. In the course of his account he mentioned that there was a state-run center for youth but that the staff there used methods based on coercion and violence. Thus Don Bepo in turn decided to set out for La Paz, coming back with a plan to bring the Patronato experience to Bolivia. He chose to send Father Antonio Berta, who successfully transformed the preexisting state institution in line with the model developed in Bergamo by Don Bepo. Father Berta was to write: «for a long time they kept on repeating to me that their liberator had arrived. With the educational method of the Gospel, and that is to say with a little charity, much patience and a great deal of affection, we began»²⁹. In 1971, the Ciudad del Niño was opened in Cochabamba. Many ex-pupils of the Patronato went out with Father Berta and to this very day continue the work begun by Father Vavassori with the same spirit³⁰.

In 1972, in a renovated building beside the Patronato that had been an ancient convent, the Conventino was opened with the goal of providing assistance to individuals and families. Amongst its more specific objectives was the creation of a psychosocial support center to provide school and career guidance, and counseling for youth, the family and vocations. Alongside the counseling service, the centre subsequently also engaged in research, producing scientific publications on psychosocial topics.

The following year, in 1973, a new residential centre for youth called *Casa del Giovane*, was inaugurated. This centre too was adjacent to the Patronato buildings in Bergamo, offering one hundred places in single or twin rooms, an auditorium, canteen, library, reading and games rooms, gardens, car parks, football pitch, tennis courts. Don Bepo put the young residents themselves in charge of running the house, clearly in order to help them develop a sense of responsibility. During the last years of his life, Don Bepo increasingly felt the urgency of the problem of drug addiction and in February 1974 he had a long meeting with Father Luigi Ciotti, founder of the Gruppo Abele in Turin. Some months later, during a meeting of past-pupils, Father Vavassori addressed the theme of drugs and spoke of a possible future initiative: «in our own city too there are [drug addicts], and not a small number of them. They cannot be

era Betty: biografia di Betty Ambiveri, Trescore Balneario, San Marco, 1986; B. Colnaghi, *Betty Ambiveri: una storia nella storia*, Brusaporto, Algigraf, 2012.

²⁹ Patronato San Vincenzo, *Don Bepo 1888-1975*, cit., p. 136.

³⁰ At the *Centro Studi* there are numerous documents on the mission to Bolivia still awaiting analysis. Of particular importance is the correspondence between Don Bepo and his collaborators in Bolivia: *Centro Studi* b. 31 ff. 1, 2; b. 32 f. 1. Also to be found at the *Centro Studi* are the interviews conducted by Dr. Mazzella with Mr. and Mrs. Invernizzi and Dr. Gamba, who today still carry on, following the example of Don Bepo and Father Berta, the missionary work in Bolivia.

viewed as lawbreakers; they are only people who are ill. Something must be done to help them, to rehabilitate them. With discretion and a huge amount of tact, with great love. There is no point in denying the difficulties involved, but we cannot just look and pass on»³¹. In October 1974 representatives of the city's leading institutions met to coordinate a series of initiatives designed to address the phenomenon of drug addiction. These meetings were attended by Father Ciotti, Sandro Teanini – who was the first to set up rehabilitation programs for drug addicts in Bergamo – and the now elderly Don Bepo.

Father Vavassori died in Bergamo, at the age of 86 years, on 5th February 1975.

2. «Love one another»: the educational principles of Don Bepo

The Opera is open to young workers, students without means and those who, due to special circumstances, cannot gain admission to other institutions. In our city, amongst the many works of charity, there is not yet an institution that caters for young apprenticed workers, offering them reasonably priced accommodation in a morally sound environment. The orphans that have been discharged from their institutions are often lacking in a guide as they make their first contact with a free existence. There are many youths, abandoned by their parents, who live as strays, easily falling victim to corruption, and all too often ending up on the path of evil and dishonor; there are also many students who are no longer willing to stay at boarding school: on the other hand, they themselves realize that doing nothing is not only an economic burden for their family, but harms their studies and all too often leads to moral ruin. Many of these youths have asked to enter, but we have only been able to take in a limited number. The Lord often leads to our door one of these lost youths, who have experienced the bitterness of giving up, the emptiness of life's attractions. Here they are reborn [...] What gratitude in their eyes, with what great happiness they overflow! These are the great joys that more than repay any of the sacrifices made for them³².

These were the words chosen by Don Bepo in 1927 to present the Patronato San Vincenzo and its aims in the booklet *Il Patronato San Vincenzo de' Paoli*, which had the expression «Love one another» printed on the front cover. Inside the pamphlet Don Bepo explained what he meant by this:

it is a guideline, a banner under which all those who have something to receive, but also all those who have something to give, are gathered in a constant flow of charity back and forth. It is an emblem of fraternity that is not based on a rhetorical phrase: the Gospel is not rhetorical, it is life, a form of life that calls each one of us to commit to living it; he who

³¹ *Ibid.*, p. 141.

³² These words of Father Vavassori are from the 1927 booklet *Il Patronato San Vincenzo de' Paoli*. The same citation appears in *Patronato San Vincenzo, Don Bepo (1888-1975)*, cit., p. 55.

decides not to live it runs the risk of feeling out of place, a degenerate son, an intruder in the Father's House³³.

In a century marked by vast social, political and economic change that strongly impacted on the family and traditions, Father Vavassori, an acute and sensitive observer of the needs of the society of his time, decided to dedicate his charitable and educational efforts to children and youths in difficulty (whether orphaned, abandoned, poverty-stricken or marginalized), following in the general direction of the pastoral work of the Church in Bergano in those years. Adopting the spirituality of Saint Vincent de Paul, he followed in the wake of Father Lodovico Pavoni, Father Giovanni Piamarta, Father Luigi Guanella and took up the educational methods of Don Bosco. Don Bepo's humanity, personality and spirituality were profoundly united, and sustained by his total trust in Divine Providence. His closest collaborators have described him as a priest of deep faith and great humanity, devoted to the constant and untiring exercise of charity. Indeed, on reading through his personal diaries, one discovers that he drew the deep energy underpinning his actions from prayer, meditation and reading his breviary³⁴. His love and trust in a God who provides opened his heart to the sufferings of the young, each of whom he welcomed individually³⁵. Love of prayer was the first teaching that Don Bepo transmitted to his collaborators. He unfailingly invited his fellow priests to ensure that their active lives were supported by their inner lives, so as to avoid the risk of engaging in an activism that was an end to itself. Furthermore, he saw meditation and a passionate love of the Lord as the basic instruments required to love the youngsters as if they were the priests' own children:

³³ *Ibid.*, p. 53.

³⁴ It should also be noted that Father Vavassori, from his years of training at the seminary up to a few days before his death, always filled out an examination of conscience in a notebook: he mainly evaluated himself on prayer, the exercise of his ministry and his charitable work. Cfr. *Esami di Coscienza* 12 settembre 1912-20 gennaio 1975, *Centro Studi*, b. 2, f. 3.

³⁵ In the interviews that I conducted with Father Roberto Pennati during my years as researcher at the Centro Studi, it emerged on several occasions that the key elements of Don Bepo's spirituality were trust and serenity in Divine Providence and a continuous striving for humility. Don Bepo experienced his relationship with God as a dynamic everyday exchange: every experience, every event, every unforeseen circumstance, every painful happening, every joy and every success was brought before God. With the exception of the testimonies of his collaborators, the multiple sources on Don Bepo's spirituality held at the *Centro Studi* have yet to undergo thorough analysis. Father Pennati, a priest from Bergamo, worked from 1971 to 1978 at the Patronato San Vincenzo, with particular responsibility for the students of the lower secondary school. From 1979 he was responsible for the Comunità Agro di Sopra, a residential centre for youths with problems. In 1996 he was diagnosed with a serious neurological illness. In 2001, due to his health issues he decided to close down the community. Currently he still works for the Patronato San Vincenzo.

I would like, my dear priests, to see you become saints. I would like you to be in love with God and to give generously of yourselves to bear witness to your love, by living the life of immolation that He desires and that is the very purpose of our existence. I would like this love to be the starting point for you in dedicating yourselves to the good of our youths, with the love of a father, with the understanding and indulgence of a mother³⁶.

The theme of motherhood recurs frequently in Don Bepo's writings and was at the heart of both his Marian devotion and his educational work. As we have seen, over the years Father Vavassori encountered a huge need for mothering (children without parents, war orphans, the children sent away from Nomadelfia, children from the orphanage for abandoned children in Rome and child refugees from Libya). Don Bepo chose to entrust all of them to Mary, the Divine Mother. He frequently reflected on the value of Mary's life in Nazareth: she who had brought up Jesus was the ideal model and inspiration for priests and lay people with responsibility for the human and religious education of children, adolescents and youths. Alongside Mary, the figure of St. Joseph as an example to be followed was often cited by Don Bepo in speaking to others and in his diaries. The priest frequently drew his youths' and educators' attention to Joseph's educational role as a model of hard work, rectitude and sense of justice. In light of these considerations, one can understand why the evening prayer before Our Lady, a daily ritual in the life of the Patronato, was a valuable educational instrument for Don Bepo and the affective center of the house. Numerous ex-pupils – some many years later – have recounted this moment of the day not only in terms of an act of prayer and devotion, but as a moment of particular closeness and affect, especially for those children who did not have a family of their own. As may be gleaned from the words of Don Bepo, giving orphaned and abandoned children a mother and a family is a key element of the educational intervention, that goes far beyond the provision of material assistance and care:

The little ones with no home and no parents, who grow up in cohabitation with others, would not be fully formed for life. They need bread, but still more they need to be nourished with affection, that unreserved, individual affection that cohabitation cannot give. They need a big institution but a small house and, more than superiors, a mother's face. I wish you could be here on the days coming up to Christmas when our house empties. Only the little ones who have no relations at all are left behind. We would do anything in our power to spare them the pain of being alone in the world. But they would need a mother, the warmth of a home. For these young ones, the house where they are received needs to become their home from then on³⁷.

To help such children and adolescents to experience a sense of family, Don Bepo often asked them to look after the priests of the Patronato: «Now it is

³⁶ *Centro Studi*, a source that has not yet been recorded in the inventory.

³⁷ *Centro Studi*, from a source that has not yet been recorded in the inventory.

the turn of you young people [...]. Bring to this house the love with which I have tried to love you. Do not leave your priests and educators alone. It is to you young people that I entrust with great hope and confidence the future of our and your big family». These words are also indicative of Don Bepo's concern for the future of the Patronato and in particular of the Associazione del Patronato San Vincenzo, whose mission was to continue the educational work of the Patronato – themes these deserving of further investigation but still awaiting analysis. It should be pointed out that, just as he had come up with the idea of providing the younger children with a mother figure and all his young people with a home and a family environment to grow up in, Don Bepo wished to help the young adults who had been discharged from the Patronato to set up a family of their own. This idea was translated into practice in 1955 with the building of the Villaggio Sposi. The district, which still exists today, now extending over a very large area, was constructed in the agricultural area of the Grumellina around the parish Church of St. Joseph at Father Vavassori's behest and funded by low-cost mortgages.

Lack of a family and of stable points of reference were in Father Vavassori's view one of the main causes of juvenile delinquency, an issue on which he believed all adults were called to reflect and which, as the following text shows, could not but awaken their sense of educational responsibility:

For almost all of them the cause that marked their first step towards their fall was the lack of a home. And therefore is the blame not mainly to be attributed to those who failed to give them the love they so badly needed? If there were houses to receive those youths who for one or another reason must live away from their families, delinquency would be reduced by 90%. In order to assist them properly new houses need to be built, new responsibilities faced up to, if necessary big debts incurred. I make my own of the words that St. Vincent de Paul addressed to his ladies of charity with regard to the illegitimate children that they did not at first wish to help: «Their life and their death are in your hands. They will live if you go on taking charitable care of them, they will certainly die if you abandon them». There are two possible paths, their life or their death. It is up to us to choose: sacrifice with the joy of helping them, or comfortable virtue with the responsibility of not having helped them³⁸.

Don Bepo's dream of giving a mother to those youngsters who did not have a family was fully implemented in the house at Nembro (1954), which accommodated 45 children between 4 and 10 years of age, looked after by highly motivated and appropriately trained women, affectionately referred to by Don Bepo as «little mothers». Each woman provided care for a small group of children and was required to follow Mary as her educational model. As outlined above, the children from Nembro were transferred to the Villaggio San Raffaele in Sorisole between 1963 and 1965, at which point the logic of shelter was entirely abandoned in favour of a system based on welcoming, care and education. Both of these projects clearly have much in common with the

³⁸ *Centro Studi*, source that has not yet been recorded in the inventory.

Nomadelfia community of Father Zeno Saltini, whom, as mentioned earlier, Don Bepo had helped in his moment of great difficulty, by taking in many of his children. As early as 1952 Father Vavassori openly displayed his interest for Father Saltini's key idea, writing:

If they are to reach and form the souls of their pupils, rather than rules, educators need to love in order to feel loved in return. Once this bond has been formed, education is guaranteed to take place. If disappointing results have been obtained it is because too much importance has been attributed to the rules, forgetting that the cornerstone is love. All educators have felt the force of this law. The Cottolengo kept a bishop waiting so as not to interrupt his play with a handicapped boy. Don Bosco was considered mentally ill because he familiarized too much with his young people. But the teachings of the great masters have been forgotten, we inherit the rules but not the spirit of their methods. In recent years, Father Zeno Saltini has had a brilliant idea. Before any other rule comes into play he wants to give his young ones a mother. That is the secret of education. It is true that Don Zeno was struck by failure, and sent away from those he had been helping; he made his mistakes and he is having to endure the consequences. But the substance remains; he got onto the royal road by considering motherly love to be the foundation of education. The storm that has struck him will pass but his teaching will remain fertile³⁹.

Father Vavassori not only took up Don Zeno's concept and implementation of vocational motherhood, but also shared with him the rejection of the notion of boarding school. He tolerated the demand for institutions for young people as a necessity which he would have avoided if he could: in the institution the youngster was made amorphous in an inevitable tendency towards uniformity, which prevented or delayed his personal development. This thought is clearly expressed in a speech made by the priest on 28th November 1948:

[The Patronato] is not a shelter. This word contains a concept that happily has been made obsolete while the word orphanage denotes a sense of humiliation that is at odds with the pride that man feels for his dignity. Have the boarder and the child born with a silver spoon in its mouth actually earned the bread with which they are nourished each day? And does the orphan not have the right to eat bread buttered with paternal love? What difference can there be between youngsters of the same age and why should they be called by different names or received in different houses just because one lot of them are orphans and the other lot are not? Our workshops are not a business or a small factory. Because their purpose is not so much to produce as to professionally train young workers. They must learn a trade even if this implies a lower level of productivity. These young ones will have no other patrimony in life than the skill of their own hands, they need to become trained workers so as to be able to earn their daily bread. On the other hand, it is not purely a school, because they must produce something, not having anybody behind them to pay a fee, they must be the first to contribute to their own maintenance. And what is more, our workshops must give employment to those of our youths who have learned the trade but do not find a job straight away. This is not a boarding school in the sense that every action must be guided by a rule. The youngster that is brought up in this way becomes like a machine and when he leaves the Institute goes astray like a train that goes off the rails. It is a method that may work well in

³⁹ Patronato San Vincenzo, *Don Bepo 1888-1975*, cit. pp. 112-113.

the Nordic countries, but for us is a system that generates deception or rebellion. Neither however is there that familial freedom in the sense understood by some, that freedom that generates disorder and is a source of distress, which is incapable of setting any limits. Our aim, following in the spirit of Saint John Bosco, is to educate our youngsters by accustoming them to make good use of their freedom. This requires constant and intelligent effort and great love for the youngsters⁴⁰.

Condensed in these words we find the most distinctive and frequently recurrent aspects of Father Vavassori's educational work. First of all, his ability to interpret the most pressing social problems of his time (youths in search of a home, a family and a life) and to offer appropriate and effective solutions. Drawing on the teachings of Don Bosco, Don Bepo stressed the importance of a free and conscious religious and moral formation for young people as the basis for their entire education, as well as the importance of learning a trade. His words also reflect an atmosphere of great charity and total trust in Providence and in the resources provided by God. Father Vavassori's ultimate motivation, like that of Don Bosco, was charity: the love of God and of his neighbor, in line with his Catholic faith and priestly vocation. Finally, his speech is characterized by strong optimism with regard to the goodness of youth and successful outcomes for his educational programs: Don Bepo's dedication to educational goals was born of his innate trust in man and in particular in children and youth⁴¹.

Although he was an assiduous writer throughout his whole life, Father Vavassori never produced a particular piece of writing intended to systematically present his educational thinking or the key directions within his educational practice. Rather than laying down precepts or theories, Don Bepo presented his educational approach in terms of his life experience, example and personal transparency. Nonetheless it is important to note that many of the priest's writings bear some relation to the education of the young, no matter what type of writing is in question: historical, apologetic, didactic, catechetical, religious, hagiographic, biographical or normative. It would therefore be of great interest to analyze all of Don Bepo's writings, with a view to identifying the key guidelines underpinning his educational method, which was characterized by providing care underpinned by trust and hope, listening attentively to young people, displaying true concern for the situation of every individual and bearing witness by giving unconditional love to all:

We know well that we have not entirely fulfilled our duty when we have given our young person bread, a roof over his head and a profession, or when we have given him a smile; we

⁴⁰ *Centro Studi*, source that has not yet been recorded in the inventory.

⁴¹ Cfr. the talk *Non esistono ragazzi cattivi* given by Father Giuseppe Vavassori 22nd September 1953. *Centro Studi*, source that has not yet been recorded in the inventory.

could have formed an egotist, jealous of the security that he has acquired and careful not to use it or to become poorer by telling others about it. This is our top priority: to introduce charity into these boys' souls, they must not only receive, they must also know how to give⁴².

He knew how important it was to provide work and a home to his youths, but equally he realized how essential it was that they did not become selfish. This aspect, peculiar to the educational approach of Don Bepo, clearly emerges in the expression «the poor must not only receive, they must also know how to give». The same educational insight may be found in the writings and life of Father Lorenzo Milani⁴³.

We have already pointed out that Don Bepo took as his models the figures of Mary, St. Joseph, St. Vincent de Paul, the first inspiration for his works of charity, but above all Saint John Bosco. Don Bepo owned a biography in several volumes of the last-mentioned and he read a passage from it every day. The two priests shared a passion for educating the young, as well as many educational principles⁴⁴. First and foremost, charity, the love of God and of their neighbor, in line with their Catholic faith and priestly vocation. They were also both characterized by a combination of greatness in terms of their ideas and levels of action and the concreteness of the work actually implemented. Don Bepo, like Don Bosco, never stopped canvassing his collaborators and benefactors, via personal contact, frequent exchanges of letters and the imparting of numerous instructions. Father Vavassori possessed the art of 'cultivating' his benefactors: this quality might have seemed to denote guile but for the fact that it sprang from his great love for the individuals to be helped. He asked for help out of love for those in need but also for those who gave, in a context of sincere recognition and friendship, managing to establish relationships with his benefactors that were neither forced nor artificial. Father Vavassori's work was not a mere question of activism: it was a conscious and voluntary consecration, a mission with a precise purpose, the salvation of youth as Don Bosco wrote in 1877 in *Sistema preventivo nella educazione della gioventù*⁴⁵. Don Bepo's heart never stopped loving his young people, right to the last. His educational ideas were in line with his action, which in turn was coherent with his personality: all of Don

⁴² Patronato San Vincenzo, *Don Bepo 1888-1975*, cit., p. 140.

⁴³ Cfr. R. Sani, D. Simeone, *Don Lorenzo Milani e la Scuola della Parola. Analisi storica e prospettive pedagogiche*, Macerata, eum, 2011.

⁴⁴ On the educational work and figure of Don Bosco, see at least F. Traniello (ed.), *Don Bosco nella storia della cultura popolare*, Torino, SEI, 1987; P. Braido, *Prevenire non reprimere: il sistema educativo di don Bosco*, Roma, LAS, 1999; P. Braido, *Don Bosco prete dei giovani nel secolo delle libertà*, Roma, LAS, 2003; G. Chiosso, *Carità educatrice e istruzione in Piemonte. Aristocratici, filantropi e preti di fronte all'educazione del popolo nel primo '800*, Torino, SEI, 2007, pp. 171-212.

⁴⁵ Braido, *Prevenire non reprimere. Il sistema educativo di don Bosco*, cit., p. 179.

Bepo was concentrated in his heart, understood here not only as the organ of love but as the core of human existence:

Even now the youth have remained youth, ready to accept noble ideals and give of themselves without reserve. The young person, the adolescent, requires individual formation; today more than ever mass-education does not work. This is the problem of all problems. Diplomas, degrees, the studies required to fulfill one's duty as an educator are of no value if there is not love, a specific moral quality, that leads the educator to have the passion of an artist, the love that reflects the love of father and mother⁴⁶.

Don Bepo's love, like Don Bosco's, was mainly directed at youth, towards whom he took on a role of educational fatherhood. As mentioned earlier, he saw the Patronato's community of young people as one big family, a trait that constantly emerges from the testimonies of his past-pupils⁴⁷.

In light of what has been outlined so far, we may suggest that Don Bepo's extensive work was rooted in the great theological virtues of faith, hope and love, with all that these implied in terms of constantly looking to God, his ultimate end, and to his neighbor, loved because God loved him and as God loved him. We find a particularly good expression of this in some notes jotted down by Don Bepo on 13 April 1968:

I will write down what I remember in no particular order, and if I have time and it seems worthwhile I will reorganize them later.

1. In order to do good, one has to love a lot, the more one loves, the more spontaneous and fertile one's work becomes.
2. View the needs of others as our own, and work with all our strength to help them.
3. It is important to see children's, youths' and collaborators' good sides and strong points in order to establish a bond of affection, which in turn brings about the unity required for the apostolate to be fertile and for the works to thrive.
4. The teaching of the Gospel is simple, true and perfect, as God is simple, true and perfect⁴⁸.

3. *Don Bepo's legacy: the Patronato San Vincenzo today*

After Father Vavassori's death, the Patronato did not slow down its development and over the years continued with its activities, while keeping alive the charity, educational principles and formative values of its founder. In

⁴⁶ *Centro Studi*, source that has not yet been recorded in the inventory.

⁴⁷ See for example, the interviews with Tino Sana, Raffaele Gadda and Mario Cavallini stored at the *Centro Studi* and used in the documentary *Don Bepo un uomo speciale* produced by Dr. Mazzella and Daniele Gastoldi, a professional cinematographer, using the oral and audio-visual sources held at the *Centro Studi*. The documentary was presented to the Patronato San Vincenzo and broadcast by *Bergamo TV* on 5 February 2010, to mark the 35th anniversary of the death of Don Bepo.

⁴⁸ *Centro Studi*, source that has not yet been recorded in the inventory.

the late 1970s it began to respond to new forms of poverty and marginalization (minors with criminal charges against them, immigrants from outside the EU, the homeless, AIDS victims) which required different specific solutions to those provided in the past. Therefore some of the former projects were wound up (the boarding school and youth residence), while others were enhanced (vocational schooling, residential accommodation for workers).

The Patronato's specific fields of action have recently been confirmed by the Bishop of Bergamo, Mons. Francesco Beschi⁴⁹. Work with children, teenagers and youths, is the area to which the Patronato, today as in the past, devotes much of its moral, spiritual and economic resources: it currently hosts almost 2,500 young people in the houses of Bergamo, Clusone, Sorisole and Endine and in the missions in Bolivia⁵⁰. Through the *Servizio Esodo*, which offers the homeless a street-based support service, evening meals and overnight accommodation, the Patronato keeps up Don Bepo's spirit of charity towards the poor and marginalized⁵¹. Another service that has always characterized the Patronato, and is still part of its offering today, is accommodation, which differs from residential help centres in that a small monthly fee is charged. Due to the difficult economic situation however, many of the guests are unable to pay even this modest amount and do not even have the means to cover their other daily living expenses⁵². Finally, the Patronato offers a reference point

⁴⁹ See <<http://patronatosanvincenzo.it>> (last access: May 5th, 2014).

⁵⁰ The Patronato continues to provide a home and family for young persons who have none through the Ciudad de los Niños and the houses of Cochabamba and Chapare. The Associazione Formazione Professionale (Bergamo, Clusone, Endine, Scuola Niños and Scuola Agricola) provides vocational training, educational and social services in line with the educational and social thinking of Don Bepo. The Associazione don Milani in Sorisole, founded in 1978 by Father Resmini, provides care for minors and youths in conditions of marginalization and deviance. The Meta Center has for some years now been offering teens and youths at risk with a space for prevention where they are also helped to successfully enter the labor market. A well-defined model has been developed which offers new prospects for implementing the educational spirit that is typical of the Patronato. Recently another new service, Agathà, has been launched in Bergamo with the aim of rehabilitating girls and young women with problems.

⁵¹ The *Servizio Esodo*, launched in 1990 by Father Fausto Resmini, has chosen the streets as its privileged site of action. A mobile unit operates on a daily basis providing a support and listening service, catering for primary needs by distributing clothing, medicines, blankets and evening meals, offering overnight accommodation at the house in Sorisole, accompanying those who require medical attention to the appropriate local health services and providing individual assistance to guide users through the social services network. The non-profit organization *In strada* onlus is also a part of the *Servizio Esodo*, which since 2001 has been training volunteers to provide practical assistance to the homeless and marginalized.

⁵² In the main house in Bergamo there are 70 rooms for men aged 29 years and over from different regions of Italy who have come to Bergamo for work or study purposes, for relatives of patients at the city's main hospitals, for divorcees in difficult economic circumstances and for homeless persons. Groups, associations and organizations carrying out activities of various kinds are also hosted at the Casa del Giovane, Conventino and Casa Centrale. The Casa del Giovane offers about 100 bed spaces for adolescents and youths of up to 28 years of age who require support in their human and Christian formation.

and a center for the reception, training, and development of various projects involving, thousands of foreign nationals: the Ruah community was set up as part of the attempt to cater for the growing number of immigrants in the area⁵³.

Honoring the memory of Don Bepo by retracing the main stages and key works in his services to young people, and valuing his teachings, not only means carrying on his educational work with the same degree of passion, it also implies making our own present-day attempt to combine life and faith, to live as believers in a society defined as complex, fragmented, media-driven and globalized. Thus the attention I have devoted here to the figure of Don Bepo – and on reconstructing the history of his houses of education falls not only within the area of historic research, but also within the broader and more complex context of the current educational crisis⁵⁴. Significant in this regard are the words chosen by Roberto Amadei to commemorate the figure of Father Vavassori:

[...] we will have the opportunity to gain in-depth insight into a segment of the history of our Church, and to grasp the riches poured out along his path by this humble, faithful and courageous priest. Riches entrusted to our responsibility so that we may continue, perhaps under different forms, along the ways opened up to us by his daring initiative based on his faith in the Providential Father and on his desire to witness God's immense love to the new generations. We will learn to «look [at them] without passing on», and to listen to them with confidence, affection and esteem⁵⁵.

⁵³ Using the Casa Centrale in via Gavazzoni as their base, the *Esodo* and *In Strada* projects in Sorisole have extended their services to the immigrant population over the past year by creating around 30 bed spaces for accommodation emergencies, a common room for the foreign residents of the Patronato, and a canteen that on Saturday evenings opens primarily for immigrants, also providing listening and coordination with the broader network of Church and civil institutions.

⁵⁴ On the theme of the educational crisis, see at least G. Vico, *L'avvento educativo dei 'poveri cristi'*, Milano, Vita e Pensiero, 2007; L. Pati, L. Prenna (edd.), *Ripensare l'autorità: riflessione e proposte educative*, Milano, Guerini, 2008; *Lettera del Santo Padre Benedetto XVI alla diocesi e alla città di Roma sul compito urgente dell'educazione*, 21 gennaio 2008, <<http://www.vatican.va>> (last access: March 24th, 2014); G. Vico, *Emergenza educativa e oblio del perdono*, Milano, Vita e Pensiero, 2009; Comitato per il progetto culturale della Conferenza Episcopale Italiana (ed.), *La sfida educativa*, Roma, Laterza, 2010; W. Brezinka, *Educazione e pedagogia in tempi di cambiamento culturale*, Milano, Vita e Pensiero, 2011; Conferenza Episcopale Italiana, *Educare alla vita buona del Vangelo. Orientamenti pastorali dell'Episcopato italiano per il decennio 2010-2020*, <<http://www.chiesacattolica.it/documenti>> (last access: March 24th, 2014).

⁵⁵ Cfr. R. Amadei's presentation of the book Patronato San Vincenzo, *Don Bepo 1888-1975*, cit.

Casa dolce casa: nascita e principi formativi della Scuola di educazione ed economia domestica di Bergamo (1908-1918)

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Home sweet home: birth and educative principles of the School of education and domestic economy of Bergamo (1908-1918)

ABSTRACT: This article focuses on the School of Education and domestic economy of Bergamo from the birth (1908) to 1918. In this historical period many little girls worked in factory and the school of Bergamo was addressed to the young workers to teach them the household. It was a way to transmit a traditional idea of the woman and of her duties. Before being able to implement this project was necessary, however, to form teachers of household: the school also had this purpose. The School of Education and domestic economy born in Bergamo was the first of its kind in Italy, however, the most important and long-lived.

EET/TEE KEYWORDS: Women's Education; Girls' School; Women's Work; Italy; XX Century.

La fondazione e il dipanarsi dell'esistenza della Scuola di educazione ed economia domestica di Bergamo affondano le proprie radici nel tessuto storico, economico e sociale nazionale¹ e, pur con delle specificità connesse al territorio bergamasco, risentono contemporaneamente di importanti esperienze che già da tempo erano state avviate in Europa.

Ripercorrendo la storia dell'educazione femminile attraverso i secoli, è stato rilevato come la formazione delle giovanette avvenisse, fino a tempi relativamente recenti, all'interno delle mura domestiche o conventuali. Il destino che attendeva

¹ Per un approfondimento del contesto storico cfr. *Storia della società italiana*, Vol. XX: *L'Italia di Giolitti*, Milano, Teti, 1992, ma anche G. Aliberti, *L'economia domestica italiana da Giolitti a De Gasperi: 1900-1960*, Roma, 50&più Editore, 1992.

una bambina era quello di assurgere ad angelo del focolare, innalzarsi al ruolo di regina della casa attraverso la trasmissione, di madre in figlia, di un sapere tutto femminile, fatto di cure domestiche e lavori donneschi. Nell'Italia postunitaria la nascita di un sistema d'istruzione pubblica e l'istituzione dell'obbligo scolastico, almeno per quel che riguardava la scolarizzazione primaria, mutarono la situazione solo lentamente. A lungo, infatti, si continuarono a nutrire sospetti sull'opportunità sociale e morale riguardante l'istruzione femminile, in modo particolare se le destinatarie appartenevano ai ceti popolari².

Per quanto concerne il mondo del lavoro, se in teoria le donne avrebbero dovuto occuparsi dell'andamento domestico facendo della famiglia e della casa il proprio centro di attività, nella realtà la situazione appariva differente. Già negli anni ottanta dell'Ottocento il mondo femminile aveva partecipato attivamente al processo di industrializzazione italiano, mentre ad un periodo ancora precedente risaliva l'utilizzo della manodopera muliebre nel lavoro agricolo. Come sottolinea Michela De Giorgio, tuttavia, fu solo con l'espansione della manifattura meccanizzata che il lavoro extradomestico venne rappresentato «come affronto alla natura 'domestica' femminile», mentre l'occupazione nei campi continuò a essere considerata come una sorta di espansione nell'ambiente esterno dei doveri muliebrici³. La storia dell'ingresso della donna nel mondo del lavoro presenta caratteri di profonda complessità e fu caratterizzata da cooptazioni ed espulsioni a seconda dell'andamento congiunturale ed economico.

Nel corso dell'Ottocento, frattanto, il lavoro minorile era una realtà non solo nella Londra dickensiana, ma anche nell'Italia settentrionale descritta da Emilio De Marchi. Le inchieste coeve indicano come, nelle nascenti industrie italiane, in modo particolare in quelle manifatturiere, fossero presenti bambini di ambo i sessi anche al di sotto dei nove anni d'età. Le bambine, in particolare, venivano impiegate nelle industrie del cotone, della lana, del lino, della canapa, della carta, dei cordami, delle candele, dei saponi⁴. Era, il loro, un lavoro massacrante che le impegnava per circa dodici ore al giorno e che si svolgeva in ambienti insalubri e promiscui, minandone spesso la salute e la crescita. Nel 1886 lo Stato italiano promulgò una legge a tutela del lavoro minorile con la quale si vietava il lavoro industriale, nelle cave e nelle miniere ai fanciulli al di sotto dei nove anni. Per tutto il secolo il dibattito che ribadiva la necessità di tutelare la salute fisica e morale dei bambini, insidiata dal lavoro negli stabilimenti, rimase vivo nel Paese, tanto da sfociare, nel 1902, in una nuova legge che innalzava ai dodici anni l'ingresso

² C. Covato, *Educare bambine nell'Ottocento*, in S. Ulivieri (ed.), *Le bambine nella storia dell'educazione*, Roma-Bari, Laterza, 1999, pp. 215-232.

³ M. De Giorgio, *Le italiane dall'Unità a oggi. Modelli culturali e comportamenti sociali*, Roma-Bari, Laterza, 1992, p. 456.

⁴ G. Di Bello, *Le bambine tra galatei e ricordi nell'Italia liberale*, in Ulivieri (ed.), *Le bambine nella storia dell'educazione*, cit., pp. 286-290.

dei fanciulli nelle fabbriche⁵. La presenza dei ragazzi negli opifici, del resto, era una delle cause della scarsa frequenza scolastica, cosa questa che rischiava di ostacolare sia il processo di alfabetizzazione del popolo italiano sia quello di costruzione del 'buon popolano', cui un minimo di istruzione era necessaria per essere appieno inserito socialmente nella realizzazione di un'Italia alla ricerca di elementi unificanti. Il lavoro nei campi, invece, rimase non regolamentato e i bambini continuarono a lungo a contribuire all'economia di sussistenza familiare conducendo le bestie al pascolo e raccogliendo frutta e foraggi.

La situazione descritta si adatta anche al territorio bergamasco. Un'indagine svolta nel 1881 e relativa alla scolarizzazione della provincia attesta che le popolazioni più alfabetizzate erano quelle residenti in distretti montani, aree in cui agricoltura e industria erano meno sviluppate. La frequenza delle scuole situate in zone collinari o nell'altopiano era assidua da novembre ad aprile, mentre diveniva scarsa, se non nulla, nei rimanenti periodi dell'anno, con la riapertura degli stabilimenti (che di norma venivano chiusi nella stagione invernale) e la ripresa dei lavori nei campi⁶. L'inchiesta metteva anche in luce come fossero le fanciulle ad avere la frequenza più discontinua, fatto da mettere in relazione con il loro massiccio impiego nell'industria serica, ma anche con la radicata convinzione che per le ragazze l'istruzione scolastica fosse meno importante. Nell'ultimo scorcio dell'Ottocento vennero fondate nei maggiori centri industriali della penisola, compresa la zona bergamasca, alcune scuole per operaie che cercavano di offrire una possibilità di istruzione anche a coloro che erano impiegate nel lavoro di fabbrica. La codificazione di norme aziendali sempre più rigide, la durata giornaliera e la distribuzione settimanale del lavoro (che comprendeva anche il sabato), tuttavia, posero vincoli quasi insormontabili di calendario e orario a tali proposte formative. Inserite in una visione paternalistica, fecero eccezione quelle scuole volute e sovvenzionate da alcuni industriali che ne appoggiarono la fondazione negli stessi luoghi di lavoro⁷. Le scuole destinate alle operaie si proponevano, accanto a un'istruzione di base, anche una formazione ai tradizionali lavori domestici⁸. L'ingresso sempre più massiccio delle fanciulle nelle fabbriche, ingresso che in alcuni casi avveniva fin dai sette o otto anni, suscitava infatti apprensione da un punto di vista sociale non soltanto nel mondo cattolico, ma anche in quello liberale. Si andava perdendo quello che, all'interno delle mura domestiche, era

⁵ *Ibid.*, pp. 252-253.

⁶ G. Fumi, *L'istruzione professionale e tecnica dall'unità al primo conflitto mondiale*, in V. Zamagni, S. Zaninelli (edd.), *Storia economica e sociale di Bergamo*, Bergamo, Fondazione per Storia economica e sociale di Bergamo, 1997, Vol. V, Tomo III, p. 320.

⁷ *Ibid.*, pp. 321-323.

⁸ Questo può essere detto anche per le scuole professionali femminili che permettevano alle donne determinate specializzazioni. Cfr. S. Soldani, *Il libro e la matassa. Scuole per «lavori donneschi» nell'Italia da costruire*, in Ead. (ed.), *L'educazione delle donne. Scuole e modelli di vita femminile nell'Italia dell'Ottocento*, Milano, Franco Angeli, 1989, pp. 87-129.

sempre stato il passaggio di conoscenze e saperi dalla madre alle figlie le quali, aiutando a sbrigare le faccende di casa fin dai primi anni di vita, apprendevano, inconsapevolmente, un bagaglio formativo di nozioni utili al loro futuro di spose e madri.

Nel corso dell'Ottocento le istituzioni scolastiche contribuirono a creare un duplice modello femminile, quello destinato alla popolana e quello riservato alla ragazza di buona famiglia, accomunate però da un medesimo destino casalingo. La fanciulla di umili natali era destinata a divenire moglie di operaio e, in relazione a questo suo destino, doveva apprendere tutta una serie di nozioni pratiche e teoriche che avrebbero fatto di lei una buona massaia, capace di salvare dalla rovina la famiglia operaia grazie a un'attenta vigilanza domestica fatta di ordine, risparmio, onestà, moderazione, ricerca dell'appagamento nelle piccole cose. La modesta casa, resa piacevole dalla serenità e da semplici abbellimenti come un fascio di fiori di campo, avrebbe impedito al rozzo marito di cercare pericolosi svaghi nel gioco e nel vino oltre che lasciarsi fuorviare da dannose idee sovversive. La presenza costante della donna all'interno delle mura domestiche era quindi giudicata necessaria per l'intero ordine sociale e, infatti, qualora nei libri di testo del corso popolare si parlasse di operaie, esse risultavano essere nubili: un chiaro modo per mostrare come il diffuso lavoro extradomestico fosse inconciliabile col ruolo di moglie e madre⁹. Anche le fanciulle appartenenti alla borghesia erano destinate a divenire donne di casa. Nonostante il comune compito di nune tutelare dell'armonia casalinga, alle ragazze di buona famiglia, tuttavia, non venivano mai consigliati i lavori manuali donneschi, bensì letture, ricamo, disegno, musica, in preparazione a un ruolo di sposa e madre che «esercita[va] le doti e le abilità della intrattenitrice della vita culturale della famiglia»¹⁰. È su quest'ultimo esempio che, all'inizio del Novecento, faceva la sua comparsa anche in Italia un modello innovativo, quello della «donna nuova», caratterizzato da una più marcata dimensione sociale. Il tradizionale ruolo materno da privato e familiare si allargava alla società intera, che diveniva campo d'azione diretto per la donna o, almeno, per quella parte del mondo femminile appartenente alla borghesia e alla nobiltà più illuminata che, attraverso un lento percorso di acculturamento, aveva preso coscienza di poter svolgere un ruolo educativo più «militante»¹¹.

⁹ M. Bacigalupi, P. Fossati, *Da plebe a popolo. L'educazione popolare nei libri di scuola dall'Unità d'Italia alla Repubblica*, Firenze, La Nuova Italia, 1986, pp. 91-100.

¹⁰ *Ibid.*, p. 91.

¹¹ In merito alla nascita della «donna nuova» si rimanda, in particolare, al seguente studio: M. De Giorgio, *Dalla «donna nuova» alla donna della «nuova» Italia*, in D. Leoni, C. Zadra (edd.), *La grande guerra. Esperienza, memoria, immagini*, Bologna, il Mulino, 1986, pp. 307-329. Per una ricostruzione di quali furono le tappe nell'edificazione di una tipologia femminile «nazionale» cfr. M. De Giorgio, *Italiane fin de siècle*, «Rivista di storia contemporanea», vol. XVI, n. 2, 1987, pp. 212-239. Un importante ruolo nella diffusione del modello della «donna nuova» venne svolto dal primo Congresso nazionale delle donne italiane del 1908. Per un approfondimento cfr. C. Frattini, *Il primo Congresso delle donne italiane*, Roma, biblink, 2008; T. Pironi, *L'educazione*

A Bergamo, agli inizi del Novecento, la Giunta al governo della città si mostrava preoccupata per «l'andazzo dei tempi, che vorrebbero la sostituzione delle femmine ai maschi in molti uffici, dimenticando che la donna è e sarà sempre l'angelo tutelare del benessere e dell'ordine nelle famiglie»¹². L'apprensione era tanto viva da ipotizzare l'istituzione di corsi intensivi di economia domestica che si sostituissero agli insegnamenti materni e che formassero non «donne dotte, ma buone massaie e buone madri»¹³. Già nel 1876 la Società industriale bergamasca, sorta verso la metà dell'Ottocento per opera degli ambienti più vivaci della borghesia locale con lo scopo di stimolare il progresso economico dell'intera provincia, attuò dei corsi di istruzione elementare femminile con lezioni festive¹⁴ poiché non si giudicavano proficue e convenienti alle donne quelle serali. Veniva inoltre creato un «comitato di signore» che presiedeva alla direzione e alla sorveglianza della nuova istituzione. Nei corsi, accanto all'insegnamento del leggere e dello scrivere, ci si preoccupava di istruire le ragazze nel cucito, nel rammendo e nel ricamo, esercizi di cui – si sottolineava – le fanciulle occupate negli opifici perdevano ogni pratica¹⁵.

Proprio in questo contesto prendeva vita nel gennaio del 1908, grazie a un «benemerito comitato», la Scuola di educazione ed economia domestica della città orobica. L'istituto veniva fondato proprio da quel «patronato di esime signore»¹⁶ cui era stato affidato il compito di vigilare sul buon funzionamento della scuola festiva femminile voluta dalla Società industriale bergamasca, che finanziò anche il nuovo progetto¹⁷. Che l'esigenza di una simile istituzione fosse sentita dai notabili cittadini è reso evidente dall'interesse dimostrato dalla municipalità stessa. Fu infatti il Comune di Bergamo, guidato dal sindaco Giambattista Preda¹⁸, a concedere gli spazi in cui collocare la scuola: tre locali

della «donna nuova» nel primo Congresso nazionale delle donne italiane (1908), in C. Ghizzoni, S. Polenghi (edd.), *L'altra metà della scuola. Educazione e lavoro delle donne tra Otto e Novecento*, Torino, Sei, pp. 249-281.

¹² Cit. in Fumi, *L'istruzione professionale e tecnica dall'unità al primo conflitto mondiale*, cit., p. 320.

¹³ *Ibid.*

¹⁴ Accanto a questa tipologia di istituzioni si andavano sviluppando in varie zone della Lombardia anche scuole festive superiori femminili. A titolo esemplificativo cfr. C. Ghizzoni, *Le Scuole superiori femminili del Comune di Milano dall'Unità alla Grande Guerra*, in Ghizzoni, Polenghi, *L'altra metà della scuola*, cit., pp. 185-214.

¹⁵ B. Valota, «L'istruzione tenuta nei giusti limiti...». *La Società industriale bergamasca e le scuole popolari*, «Studi e ricerche di storia contemporanea», n. 20, 1983, pp. 59-62.

¹⁶ *L'Origine*, «Bollettino del comitato bergamasco per le scuole di Educazione ed Economia Domestica», n. 4, 1927, p. 1.

¹⁷ Fra gli industriali e i relativi stabilimenti di cui è attestata la partecipazione al progetto possono essere ricordati Oetiker di Bergamo, Giovanni Reich di Torre Boldone, Benigno Crespi di Capriate d'Adda, Honegger di Albino, Carugati & Co. di Villa d'Almè, Legler di Ponte S. Pietro, Giovanni Blumer di Nembro, Albini di Daste, Zopfi di Ranica, Franchi Griffin di Fiumenero e Festi Rasini di Villa d'Ogna.

¹⁸ Giambattista Preda, nato a Bergamo il 21 settembre 1859, si laureò in giurisprudenza. Avvocato e sindaco di Bergamo, fu anche deputato del Regno per due legislature. Morì a Roma il

«modesti, ma ben arieggiati e illuminati» e provvisti, cosa assai rara per l'epoca, di acqua potabile e di conduttura di gas. In uno degli ambienti venne impiantata la cucina che, oltre a poter sfruttare – come si è visto – la fornitura di gas, comprendeva un focolare a legna, un forno a carbone duro, fornelli a carbone dolce, una cucina economica, una cassetta di cottura. Il locale più ampio venne adibito a refettorio e a sala per lo studio, mentre nel vano rimanente fu collocata un'ampia vasca per la rigovernatura delle stoviglie e per il bucato. L'istituto, che possedeva anche un giardino per la coltura di fiori e ortaggi, venne arredato con semplicità o, come veniva sottolineato, seguendo la norma del «tutto il necessario, nulla di superfluo»¹⁹.

La Scuola di educazione ed economia domestica nasceva sul modello delle *Écoles ménagères*, sorte già da tempo in paesi industrialmente più progrediti²⁰. Il progetto, tuttavia, prevedeva opportune modifiche ai programmi e all'organizzazione delle istituzioni estere prese ad esempio, in modo da rendere adatta la Scuola alle condizioni socio-economiche locali che, come facevano notare i promotori, erano connesse alla tipologia di industria e di prodotti del suolo presenti nella bergamasca, «al grado morale e intellettuale della popolazione», all'inveterato misoneismo e «alle tradizioni e ai costumi tenacissimi»²¹. Sebbene l'istituto venisse fondato da un gruppo di persone rappresentanti «individualmente e collettivamente sapere, studi, cuore, intelletto, esperienza, senso pratico»²² della città, anima del comitato promotore fu Anna Perico Baldini, riconosciuta unanimemente come la vera fondatrice della Scuola. La sua esistenza e la sua instancabile attività risultano esemplificative di un certo percorso culturale ormai non più precluso alle donne, purché appartenenti alla buona borghesia o alla piccola nobiltà, e di un impegno più «militante» del mondo femminile che, tuttavia, rimaneva in bilico fra un'azione sociale più modernamente intesa e una carità ancora di stampo paternalistico. Figlia del dottor Augusto Baldini, Anna era nata l'8 ottobre 1876 a Vicosoprano, nel Cantone dei Grigioni, dove in quel momento il padre svolgeva la sua professione di medico. Ben presto la famiglia si era trasferita a Bergamo e qui la fanciulla aveva intrapreso la sua formazione intellettuale. Non risulta frequentasse scuole comunali e più probabilmente la sua cultura – che le fonti sono concordi nel definire larga e profonda – derivava da studi privati e casalinghi, come spesso avveniva per le giovani di buona famiglia. Elemento di

21 maggio 1929.

¹⁹ *L'Origine*, cit, pp. 1-2.

²⁰ A titolo esemplificativo cfr. N. Seydoux, *L'introduction de l'insegnement ménagères dans le canton de Friburg, une vision de la femme au tournant du siècle*, Friburg, Université de Friburg, 1996; IRPD de Neuchâtel, *L'économie domestique: ringarde ou d'avant-gard?*, <http://www.irdp.ch/breche/educ_me1.htm> (consultato il 18 aprile 2014).

²¹ *Necrologio di Anna Perico Baldini*, «Bollettino educazione ed economia domestica», n. 4-5, 1937, p. 4.

²² *Ibid.*, p. 3.

modernità fu, invece, il completamento del suo percorso formativo all'estero. Proprio mentre si specializzava nello studio delle lingue straniere in Germania (Francoforte sul Meno), Inghilterra (Londra) e Svizzera (Ginevra), venne in contatto con la realtà delle *Ecoles menagères*. Tornata a Bergamo entrò a far parte di un'istituzione caritativa nota col nome di «Formica» che raggruppava un gruppo di giovani signore facoltose e che aveva l'intento di «aiutare le famiglie più maltrattate dalla fortuna». Nel ruolo tradizionale di «angelo della carità», queste donne si recavano di casa in casa, ciascuna in una zona diversa della città, per visitare e soccorrere in vario modo la popolazione povera. Negli anni successivi, fedele al motto da lei adottato *Transire benefaciendo*, si ritrova Anna Perico Baldini promotrice o, comunque, aderente a molteplici attività caritative e assistenziali²³. Nel 1910, ad esempio, sulla scorta della Festa delle camelie che ogni anno si teneva a Locarno, organizzò al fine di raccogliere fondi per la lotta alla tubercolosi, una Festa delle rose che, nei suoi propositi avrebbe dovuto ripetersi annualmente la prima domenica di giugno, richiamando in città facoltosi forestieri. A questo scopo nelle scuole elementari vennero distribuiti centinaia di vasi contenenti piante di rose affinché ogni alunno ne avesse cura e potesse presentare l'anno seguente, alla festa, i fiori da lui coltivati. L'iniziativa, che si svolse anche nei due anni successivi, sembra procurasse al Dispensario antitubercolare cifre cospicue²⁴. Grazie all'aiuto della contessa Elena Benaglio Curò, inoltre, Anna Perico Baldini fondò il Laboratorio delle disoccupate, una piccola bottega provvista di macchine per cucire e di tutto il materiale necessario al confezionamento di abiti e accessori sartoriali. Il piccolo esercizio si proponeva lo scopo di permettere, alle donne che lo desiderassero, di lavorare e di ricevere subito un compenso per il proprio lavoro.

Le attività assistenziali della «buona signora di Bergamo», come veniva chiamata, si dispiegarono anche durante i difficili anni della prima guerra mondiale. Anna Perico Baldini, infatti, fondò molteplici ricoveri che accolsero, dopo la disfatta di Caporetto, numerosi profughi friulani e veneti che cercavano rifugio nella città lombarda. È attestato, inoltre, il suo impegno nel dare assistenza alla popolazione di Brentonico che, posizionata sulla linea del fronte, aveva subito pesanti distruzioni, oltre ad una spedizione punitiva da parte degli austriaci. La gestione dei ricoveri venne affidata ad alcune delle maestre che si erano diplomate alla Scuola di educazione ed economia domestica da lei fondata pochi anni prima²⁵. Al termine del conflitto, inoltre, mettendo a frutto gli studi in lingue straniere, prestò aiuto nella ricerca dei soldati prigionieri o dispersi, fondando – contemporaneamente – un Ristorante economico destinato agli ex combattenti malarici. Negli stessi anni diede inoltre vita a una

²³ *In memoria*, «Bollettino educazione ed economia domestica», n. 4, 1938, pp. 1-3.

²⁴ *Necrologio di Anna Perico Baldini*, cit., pp. 1-2.

²⁵ *In memoria*, cit., p. 4.

scuola di *macramè*, sorta con lo scopo di fornire di un lavoro non gravoso, ma sufficientemente redditizio, le operaie di salute cagionevole²⁶.

Nel 1908, invece, aveva preso avvio la Scuola di educazione ed economia domestica. L'istituzione, e con essa l'anima fondatrice Anna Perico Baldini, meritano di essere ricordate sia per la novità e la longevità dell'iniziativa, sia per l'alta qualità raggiunta dalla stessa. Considerare necessario per una fanciulla l'apprendimento e lo svolgimento delle faccende domestiche non era certo un elemento originale, quanto piuttosto principio radicato nella mentalità comune. L'art. 315 della legge Casati sanciva già dal 1859 l'obbligatorietà scolastica dei lavori muliebri, mentre nei programmi speciali sul lavoro del 1899 si cominciava a sottolineare come occorresse formare la buona massaia ricorrendo «all'economia domestica»²⁷. Tuttavia, anche ammesso che le ragazze avessero frequentato la scuola dell'obbligo e appreso le prime nozioni, ci si iniziava a rendere conto che l'ingresso in giovanissima età delle fanciulle nelle fabbriche vanificava gli insegnamenti precedentemente appresi sia dall'istituzione scolastica, sia dalle figure femminili familiari di riferimento. Se, ad esempio, la Scuola pratica agricola femminile sorta nel 1902 a Niguarda, presso Milano, aveva creduto opportuno istituire lezioni bisettimanali che si rivolgessero alle figlie dei contadini e dei fittavoli al fine di educarle a essere buone massaie rurali²⁸, alla formazione domestica delle operaie nessuno aveva ancora provveduto.

Proprio questo fu il vuoto che inizialmente cercò di colmare la Scuola di educazione ed economia domestica di Bergamo, le cui attività si sarebbero tuttavia in seguito estese anche ad altre categorie femminili. Singolare fu la scintilla da cui scaturì l'idea della nascita dell'istituto. Anna Perico Baldini, che faceva parte del Consiglio di Vigilanza della scuola femminile festiva patrocinata dalla Società industriale bergamasca, una domenica, mentre con altre signore appartenenti all'«esimio comitato» partecipava a una visita d'ispezione, decise di chiedere a un'allieva che si stava impegnando in un disegno se sapesse preparare una minestra. Si può solo immaginare l'imbarazzo e la vergogna della fanciulla, che i ricordi dell'epoca definiscono «turbata», costretta a rispondere che non ne era capace. La cronaca del fatto, riportato sul Bollettino della scuola nel 1937, pur a distanza di anni, non riesce a nascondere non solo un atteggiamento paternalistico, ma nemmeno una sorta di compiacimento da parte del Consiglio di Vigilanza nel trovare in difetto la giovane, cui viene tuttavia riconosciuto l'inconsapevole merito di avere, con la sua mancanza, dato origine all'idea della scuola: «Da quella risposta vergognosa della incapacità umiliata, si sprigionò una luce che rivelò e illuminò una nuova strada, dirò meglio, un nuovo

²⁶ *Necrologio di Anna Perico Baldini*, cit. p. 4.

²⁷ Bacigalupi, Fossati, *Da plebe a popolo*, cit., p. 94.

²⁸ *Circolare n. 2 del 5 gennaio 1911 ai signori proprietari e dirigenti degli opifici industriali e delle aziende agricole, relativa ai Corsi temporanei di economia domestica*, «Bollettino del Ministero di agricoltura, industria e commercio», vol. I, serie A, 7 gennaio 1911, p. 10.

campo d'azione, fin'allora sconosciuto in Italia»²⁹. Al di là dell'occasionalità dell'episodio, comunque, una seria riflessione – come si è visto – era già stata avviata dagli ambienti più illuminati dell'imprenditorialità bergamasca circa l'insufficiente preparazione domestica delle donne lavoratrici, manchevolezza che rischiava di incidere negativamente sulla collettività poiché «nel buon governo della famiglia [risiedeva] il fondamento dell'ordine e della prosperità sociale»³⁰. Legate a quel mondo da vincoli familiari o filantropici le promotrici della Scuola di educazione ed economia domestica si proponevano la finalità di completare l'educazione delle giovani operaie con «insegnamenti razionali e pratici attinenti al governo della famiglia»³¹. Il comitato dell'istituto³² era conscio che il lavoro in fabbrica rappresentava, per la maggior parte delle operaie, una parentesi all'interno della loro esistenza. Le fanciulle entravano giovanissime negli opifici per uscirne definitivamente fra i venti e i trent'anni, quando si sposavano e ritornavano «alla naturale, alta missione che le attende[va]: ai doveri di sposa e madre»³³. Le ragazze, per contribuire allo scarso bilancio familiare o per costituirsi una dote, erano sottratte alle cure materne proprio nell'età – collocata fra i dodici e i quattordici anni – in cui la madre avrebbe dovuto farne «le future reggitrici della famiglia». Le giovani venivano, dopo circa un decennio di lavoro in fabbrica, restituite attraverso il matrimonio all'ambiente domestico, un ambiente che – tuttavia – risultava loro estraneo. Questo il quadro sociale dipinto a tinte fosche dalle «signore Patronesse»:

Quale meraviglia se il giovane nido, costituito in tali condizioni, arriva rapidamente a presentare lo spettacolo del più grande disordine economico e morale? Le modeste risorse sperperate, mal tenuta l'abitazione, trascurati il mobilio e le vesti, mal governati i figlioli, i pasti ammanniti in fretta e mal presentati. Ed ecco che il marito, istintivamente disgustato, si disaffeziona, si allontana, si abitua alle distrazioni e alle lunghe sedute in osteria. Poi le acri dispute, il malanimo cronico, il dissolvimento morale della famiglia. Ed in un siffatto ambiente cresceranno i figli, le nuove fanciulle: il vivaio di altre future famiglie infelici!³⁴

Si sottolineava, inoltre, come tutte le più grandi piaghe sociali del tempo quali alcoolismo, tubercolosi, pellagra, trovassero come loro alleata «l'ignoranza della donna di casa». In quest'analisi erano presenti tutti gli stilemi legati

²⁹ *Necrologio di Anna Perico Baldini*, cit., p. 3.

³⁰ *L'Origine*, cit., p. 1.

³¹ *Ibid.*

³² Il primo comitato della Scuola di educazione ed economia domestica eletto ufficialmente dalla direzione della Società industriale bergamasca era caratterizzato, seppur di misura, da una predominanza femminile. Ne facevano parte il cav. Giulio Zavaritt, che ne era il presidente, Anna Baldini, con funzione di segretaria, la contessa Carolina Agliardi, la contessa Elena Benaglio, Adele Mazzola, Bice Rota Zenoni, Giuseppina Tacchi Salvi, il prof. Stefano Balp, il dottor Ciro Caversazzi, il dottor Jost Luchsinger e il dottor Perico Triade.

³³ *L'Origine*, cit., p. 2.

³⁴ *Ibid.*

al processo di dirozzamento delle plebi di matrice borghese in cui la donna rappresentava il perno della redenzione del popolo attraverso i compiti che le erano attribuiti all'interno della famiglia, il cui benessere o la cui rovina dipendevano principalmente dalle capacità di buona massaia della moglie. La Scuola di educazione ed economia domestica di Bergamo condivideva questa concezione e, anzi, sorgeva proprio per contribuire alla formazione domestica delle ragazze o, meglio, alla rieducazione delle giovani operaie alla casa. Questo particolare aspetto andava a sottolineare la scelta, fortemente voluta dalla Perico Baldini, di inserire, accanto a quello di «economia», anche il termine di «educazione» nella titolazione della scuola, in posizione addirittura preminente. Sul «Bollettino del Comitato Bergamasco per le Scuole di Educazione e di Economia Domestica», ancora nel 1915, si potevano leggere giudizi sconfortati sulla massaia italiana:

Chiunque entri nella casa di un operaio o di un contadino quando la massaia sta preparando il cibo, deve tosto constatare lo sperpero di tutto quello che concorre all'allestimento del pranzo e della cena: condimento, verdura, farina, pasta e persino legna, tutto è usato con una prodigalità fenomenale in ambienti dove, di solito, al desco siede compagna la miseria. [...] E perché questo? Perché le nostre donne non furono educate all'economia domestica, perché tirano avanti di giorno in giorno con metodi da medio-evo, facendo il viso dello gnorri a quanto la scienza e l'educazione moderna cercano di stillare nelle loro menti. È quindi necessario vincere il loro torpore, l'indolenza innata, per non dire il loro animo contrario a ciò che esse chiamano novità destinate a lasciare il tempo che trovano.

Prima, tuttavia, di poter pensare di avviare un corso atto a diffondere fra le operaie degli opifici e le contadine «una studiata economia familiare rivolta alla loro elevazione civile e spirituale», occorre formare il personale docente. Proprio per la novità dell'iniziativa ci si rivolse alla vicina Confederazione elvetica, chiamando a sovrintendere ai lavori per la preparazione del corso che avrebbe licenziato le future insegnanti, la direttrice delle scuole di economia domestica del Canton Ticino, Erminia Macerati³⁵. Per gli insegnamenti di medicina, igiene, agraria, contabilità e legislazione sociale fu richiesta invece la collaborazione di «valorosi docenti», fra cui alcuni dei professori facenti parte del comitato direttivo della scuola stessa fra cui Stefano Balp e Triade

³⁵ Erminia Macerati nacque a Genestrerio (Canton Ticino) il 18 aprile del 1871. Introdusse in Canton Ticino l'insegnamento di economia domestica sotto forma di corsi itineranti e fu autrice di un notissimo manuale che ebbe numerose ristampe: *Casa nostra: trattato di economia domestica*. Morì nella città natale il 12 dicembre 1957.

Perico³⁶, futuro marito di Anna Baldini³⁷. Il 28 marzo 1908 prendeva avvio a Bergamo, nei locali situati in via Angelo Maj, il primo corso magistrale o «normale» di educazione ed economia domestica. Le alunne ammesse alla frequenza, «scelte con oculato criterio» anche tra le direttrici di reparto degli opifici e destinate a insegnare nei corsi popolari che sarebbero stati istituiti in seguito, erano dodici. Le ragazze sembra dimostrassero buona volontà e grande interesse nei confronti delle materie loro insegnate, tanto che il corso si concluse il 2 giugno «con esito soddisfacentissimo»³⁸. Come risulta dall'elenco delle partecipanti, la totalità delle allieve proveniva dalla città di Bergamo o dai paesi limitrofi (Urgnano, Torre Boldone, Colognola, Villa d'Almè, Ponte San Pietro), due appartenevano a ordini religiosi e una sola risultava sposata. Ben presto, tuttavia, i corsi normali servirono a preparare il personale docente non solo per la Scuola di educazione ed economia domestica orobica, ma anche per alcuni degli altri istituti che negli anni successivi sarebbero sorti in varie zone della penisola. Già il corso dell'anno successivo, tenutosi dal maggio al luglio del 1909 e diretto nuovamente dalla Macerati³⁹, accoglieva allieve provenienti da Verona, Brescia, Pavia, Novara⁴⁰ e due docenti, Dina Chierici di Parma e Maria Roteglia di Sassuolo, che evidentemente cercavano una specializzazione, forse per aprire una scuola analoga in Emilia⁴¹.

Dopo il primo esperimento del 1908 le norme per accedere ai corsi normali vennero meglio codificate. Le iscritte avrebbero dovuto dimostrare di essere in possesso di un diploma di maestra elementare o dar prova di possedere un grado di istruzione equivalente. Lo scopo – sottolineava il comitato direttivo – non era quello di licenziare delle «professoressa di economia domestica», ma formare personale ben preparato sia dal punto di vista teorico sia da quello pratico⁴². Veniva a più riprese ribadito che il carattere dell'insegnamento e le sue finalità

³⁶ Proprio i professori della scuola furono, con il passare del tempo, anche autori di alcuni dei libri di testo utilizzati nell'insegnamento. A titolo esemplificativo cfr. S. Balp, T. Perico, G. Conti, *L'igiene nella casa e nella famiglia: elementi d'igiene alimentare e domestica, di pratica annonaria, di assistenza ai malati a domicilio e di soccorsi d'urgenza, ad uso delle allieve delle scuole di educazione domestica*, Bergamo, Società Editrice Commerciale, 1912. Altri volumi vennero tradotti da Anna Perico Baldini da edizioni estere: cfr. F. Schwyzer, *Regole di vitto per ammalati esposte in tabelle*, Bergamo, Società Editrice Commerciale, 1927.

³⁷ *L'Origine*, cit., p. 3.

³⁸ *Ibid.*

³⁹ L'anno successivo Erminia Macerati venne affiancata nella direzione e gestione del corso normale dalla bergamasca Abigail Galizzi, che ne divenne assistente. La donna aveva frequentato, evidentemente con profitto, il primo corso istituito, tanto da sostituire nel 1911 la Macerati, che aveva ormai esaurito il suo compito di organizzatrice.

⁴⁰ *L'Origine*, cit., p. 6.

⁴¹ Effettivamente da una circolare ministeriale del 1911 risultava che una «felice prova» di scuola di economia domestica si andava svolgendo in quell'anno a Parma. Cfr. *Circolare n. 2 del 5 gennaio 1911 ai signori proprietari e dirigenti degli opifici industriali e delle aziende agricole, relativa ai Corsi temporanei di economia domestica*, «Bollettino del Ministero di agricoltura, industria e commercio», cit., pp. 9-11.

⁴² *L'Origine*, cit., p. 4.

non erano professionali, ma eminentemente educativi. Proprio per questo le allieve non venivano affidate a cuoche, nemmeno per quanto concerneva la parte pratica delle preparazioni culinarie, ma a una direttrice già diplomata in economia domestica che visse per tutta la durata del corso (sessanta giorni, undici ore al giorno) insieme alle allieve. Quello che, infatti, veniva definito come lo «sfondo luminoso» in cui si muoveva la madre di famiglia e cioè la moralità, il contegno, la disciplina, la gentilezza, l'adattamento alla convivenza con caratteri disparati, non poteva che essere insegnato in ogni momento della giornata dall'esempio di una maestra che non avrebbe potuto in alcun modo essere sostituito da un insegnamento intermittente a carattere di lezione. Meno che mai da quello di una cuoca, perché – si sottolineava – «la scuola [avrebbe potuto] insegnare ad una donna di casa come educare una cuoca, ma sarebbe stato assai difficile che la cuoca potesse educare la donna di casa»⁴³. Il personale di servizio era escluso dalla casa in cui si teneva il corso normale e in cui le allieve vivevano per tutta la durata dello stesso, poiché tutti i lavori, dai più umili ai più elevati, erano eseguiti dalle ragazze frequentanti. Il principale compito della direttrice-maestra, infatti, era di insegnare anche con l'esempio come «con tutta naturalezza, senza alcun senso di meraviglia, si [dovesse] e si [potesse] passare dalla scopa e dall'acquaio alle più nobili ed elevate occupazioni della madre di famiglia»⁴⁴. A coadiuvare la direttrice-maestra negli insegnamenti che prevedevano competenze più specialistiche quali igiene, anatomia e fisiologia, medicina domestica e soccorsi d'urgenza, merceologia, alterazione e sofisticazione degli alimenti e delle bevande, pedagogia applicata, legislazione sociale, vi erano «valenti cultori in dette materie», soprattutto medici, professori con varie specializzazioni e religiosi.

I programmi attuati nei corsi normali prevedevano tre diverse fasi di insegnamento: Nozioni generali, Nozioni scientifiche, Nozioni ed esercitazioni pratiche. Il corso cominciava con la definizione dell'economia domestica, considerata come scienza applicata e base dell'economia sociale. Particolare risalto veniva dato all'importanza del risparmio e all'amministrazione del denaro, mostrando alle allieve l'utilità di tenere una contabilità regolare delle spese di casa da attuare mediante veri e propri registri di bilancio, al fine di salvaguardare la prosperità di quella che veniva definita «azienda domestica». Importanza era attribuita anche alla missione educatrice svolta dalla donna all'interno della società, verso la quale aveva i medesimi doveri che possedeva verso se stessa e la propria famiglia, e alle iniziative che poteva intraprendere per il benessere pubblico. All'interno delle Nozioni generali trovavano asilo anche i fondamenti relativi alla «Metodologia»: oltre a spiegare alle allieve le differenti tipologie di insegnamenti di economia domestica, distinti in corsi rapidi, corsi ambulanti, corsi scolastici e scuole permanenti, si illustrava loro

⁴³ *Ibid.*, pp. 4-5.

⁴⁴ *Ibid.*, p. 5.

come organizzare una scuola di economia domestica, dalla ricerca dei locali alla stesura dei programmi, dai costi per l'impianto di tali scuole alle selezioni per l'ammissione delle scolare. Interessante risulta notare come alle allieve, proprio all'interno della sessione riguardante la metodologia, venissero impartite anche lezioni di storia sulla nascita e sullo sviluppo delle prime scuole di economia domestica estere, con particolare attenzione alle esperienze sorte in Belgio, Olanda, Svizzera, Austria, Ungheria, Cecoslovacchia, Germania, Svezia, Norvegia, Francia, Stati Uniti⁴⁵.

La seconda parte del corso, invece, riguardava nozioni scientifiche di anatomia, fisiologia e igiene, propedeutiche alla prevenzione di malattie diffuse all'epoca quali polmonite, difterite, tubercolosi. Particolare cura era riservata all'importanza dell'alimentazione e all'elencazione degli alimenti che costituivano una dieta sana ed equilibrata per le più varie tipologie di persone, dal lavoratore manuale a quello sedentario, dal bambino all'anziano. Si spiegava poi alle future insegnanti quali fossero le più diffuse malattie derivanti da errori alimentari (pellagra, litiasi, ergotismo, gotta, scorbuto, diabete, adiposi), quelle derivanti, invece, da «inquinazioni accidentali» (tifo, dissenteria, colera) e come evitarle. Degli alimenti erano altresì indicate le principali caratteristiche nutrizionali ed eventuali controindicazioni, ma anche quello che era ritenuto il giusto prezzo commerciale. Non stupisce inoltre, considerando l'utenza cui le future maestre avrebbero dovuto rivolgersi, un cenno alle malattie professionali e a come intervenire in caso di infortuni sul lavoro. Ampio spazio riguardava poi le norme igieniche personali e domestiche, l'allattamento, lo svezzamento e la cura dei bambini oltre all'assistenza agli ammalati⁴⁶.

La terza parte del corso prevedeva insegnamenti teorici riguardanti l'organizzazione di una cucina e la sua pulizia, la scelta degli utensili e la loro cura, le norme relative alla conservazione alimentare e, in un regime ancora di sussistenza, alla riutilizzazione dei resti. In armonia con la tradizionale visione della donna angelo del focolare si spiegava come scegliere il mobilio per rendere accogliente una casa, ma anche come confezionare indumenti per bambini, biancheria per uomo e donna o come lavare, stirare e conservare correttamente gli abiti. Non mancavano, inoltre, consigli su come impiantare e far prosperare 'l'orto di famiglia', ma anche norme relative alla costruzione e alla gestione di un pollaio o di una conigliera. Poiché queste attività avrebbero potuto rappresentare un'integrazione al bilancio familiare si fornivano anche elementi relativi all'allevamento del bestiame, alla bachicoltura, all'apicoltura e notizie sul commercio del miele. Questa terza parte del corso era accompagnata da esercitazioni pratiche da parte delle allieve⁴⁷, come ad esempio la scelta

⁴⁵ *Per i Corsi normali*, «Bollettino del comitato bergamasco per le scuole di Educazione ed Economia Domestica», n. 4, 1927, pp. 15-16.

⁴⁶ *Ibid.*, pp. 16-18.

⁴⁷ *Ibid.*, pp. 18-20.

e l'acquisto di derrate alimentari al mercato e negli spacci o la preparazione di pranzo e cena nel modo più sano ed economico possibile. Come si evince dai programmi, il corso – condensato in poco più di sessanta giorni - dovette essere intensivo, ma non risulta che qualche allieva non ottenesse il diploma per l'insegnamento dell'economia domestica, superando l'esame finale che si svolgeva davanti a un'apposita commissione presieduta da un delegato del Ministero della Pubblica Istruzione⁴⁸.

Una volta terminato il primo corso normale si rendeva finalmente possibile dare avvio a quella che era la finalità propria della scuola: l'insegnamento dell'economia domestica negli ambienti operai e contadini. Il comitato direttivo ebbe fin da subito ben chiaro il carattere peculiare della nuova istituzione: nel caso della Scuola di educazione ed economia domestica non erano le alunne che accorrevano all'istituto, ma era la scuola stessa che doveva sorgere fra le alunne. Per quanto riguarda gli opifici si dovettero superare le resistenze degli industriali, poco disposti a concedere alle operaie di assentarsi durante l'orario lavorativo. Inoltre alcuni imprenditori, considerando la scuola «un vivaio di abili cuoche e di esperte cucitrici», temevano che essa formasse le ragazze ai lavori di sarta, cuoca o domestica, provocando una minore affluenza delle giovani negli stabilimenti⁴⁹. A fare da apripista furono quegli industriali-filantropi che già avevano sostenuto il comitato dell'istituto alla sua nascita⁵⁰. Essi si accollarono, per i primi corsi, le spese giornaliere d'insegnamento e la retta delle iscritte, impegnandosi inoltre a mantenere immutata la paga delle operaie frequentanti. A ciascuna maestra il comitato che gestiva la scuola corrispondeva un onorario di cento lire per ogni corso, a cui andavano aggiunte le spese di viaggio. L'esempio di questi industriali e l'attività della scuola stessa fecero cadere i pregiudizi degli imprenditori che, anzi, sembrarono accorgersi che la scuola «lungi dal toglier loro le operaie, gliele rendeva migliori, più attive, ordinate, coscienziose, con vantaggio nella quantità e nella qualità del lavoro prodotto»⁵¹. Il corso, della durata di quaranta giorni esclusi i festivi, teneva occupate le lavoratrici soltanto mezza giornata, in modo da non pesare eccessivamente sull'andamento del lavoro di fabbrica. Fra le operaie che desideravano frequentare le lezioni, in consonanza con gli scopi primari della scuola, venne data la preferenza alle giovani spose e alle ragazze fidanzate e in procinto di maritarsi. Soltanto nel 1908 furono ben trecento le operaie che seguirono regolarmente i corsi⁵². Fra gli esiti ottenuti nel campo dell'istruzione

⁴⁸ *L'Origine*, cit., p. 6.

⁴⁹ *Corsi operai patronali*, «Bollettino del comitato bergamasco per le scuole di Educazione ed Economia Domestica», n. 4, 1927, p. 10.

⁵⁰ I primi a dare la propria disponibilità furono gli opifici Oetiker di Bergamo, Carugati di Villa d'Almè, Legler di Ponte San Pietro, Blumer di Nembo, Festi e Rasini di Villa d'Ogna, Honegger di Albino, Industrie Riunite Filati Albini di Daste.

⁵¹ *Corsi operai patronali*, cit., p. 10.

⁵² *Ibid.*

popolare la scuola poté annoverare anche risultati significativi nella lotta ad un certo analfabetismo di ritorno: le allieve che per tutta la durata del corso avevano ripreso a leggere, scrivere e far di conto si trovavano notevolmente «rinfrancate in quel grado d'istruzione elementare che andava in esse, per mancanza di esercizio, man mano attenuandosi»⁵³.

Modalità e motivazioni differenti ebbero i corsi di educazione ed economia domestica rurali, pensati appositamente per il mondo contadino. Innanzitutto, accanto a corsi fissi, vennero ideati quelli ambulanti. Le maestre dei corsi ambulanti, munite di una batteria da cucina fornita di tutto il necessario, andavano «peregrinando apostolicamente di villaggio in villaggio», fermandosi in ciascuno dalle sei alle otto settimane, a seconda della vastità della zona e dell'entità della popolazione. Tutto il territorio bergamasco venne interessato da questa attività, dai comuni della pianura come Verdello, Romano e Cavernago, a quelli della zona collinare (Gandino, Trescore, Cene e altri) e montana (Cusio, Mezzoldo, Serina). La scuola rurale di educazione domestica affondava la propria origine nella lotta alla pellagra⁵⁴. I corsi si proponevano di insegnare alle donne contadine a servirsi correttamente delle derrate agricole a loro disposizione «senza mangiare polenta mattina e sera», ma approntando un'alimentazione sana e variata⁵⁵. Con grande lucidità ci si rendeva conto che sarebbe stato un errore trasfondere nella popolazione rurale le abitudini alimentari in uso nei grandi centri e, infatti, in questa tipologia di corsi l'insegnamento era maggiormente rivolto alla coltivazione di un orto, all'allevamento degli animali da cortile e a un uso razionale di derrate quali latte, uova, erbe, frutta e verdura. Le maestre vivevano per qualche tempo tra le famiglie contadine di una determinata zona, sostituendosi materialmente alle contadine nella preparazione dei pasti familiari e insegnando alle massaie e alle ragazze come pulire la casa e tenerla in ordine, come curare e disinfettare la biancheria e come affrontare determinate malattie infettive. Sembra che l'insegnamento ambulante incontrasse non poche difficoltà a causa della ritrosia di persone «per natura, per genere di vita, per atavismo, refrattarie ad ogni insegnamento di igiene e per di più molto gelose del proprio focolare e molto mal volentieri disposte a permettere che un'estranea, sia pur animata dalle migliori intenzioni, [andasse] ad introdursi»⁵⁶. Proprio per questo motivo diveniva essenziale la scelta della persona, fra le allieve che avevano ottenuto

⁵³ *Ibid.*

⁵⁴ Per un approfondimento sulle abitudini alimentari degli italiani nel corso dell'Ottocento e del Novecento e le relative ripercussioni sulla salute cfr. F. Della Peruta, *L'alimentazione dei contadini nella Lombardia dell'Ottocento*, Milano, Cens, 1992; P. Sorcinelli, *La pellagra e la morte: medici condotti, malattia e società alla fine del secolo XIX*, Ancona, Il lavoro editoriale, 1982; P. Sorcinelli, *Gli italiani e il cibo: dalla polenta ai cracker*, Milano, Mondadori, 1992.

⁵⁵ *Corsi rurali per contadine*, «Bollettino del comitato bergamasco per le scuole di Educazione ed Economia Domestica», n. 4, 1927, p. 11.

⁵⁶ *Ibid.*, p. 12.

il diploma al corso normale, cui affidare un incarico tanto delicato: «opera di fede, di amore, di apostolato occorre dunque, più che opera di semplice e freddo insegnamento»⁵⁷.

Agli inizi del Novecento a Bergamo vennero costruite le prime case popolari nel quartiere della Malpensata. In armonia con le esigenze del territorio e con la filosofia educativa alla base della Scuola di educazione ed economia domestica, il Comitato decise di avviare «corsi casalinghi per le case popolari» per far sentire anche alle persone che vivevano in condizioni disagiate «il bisogno di una casa igienicamente e moralmente migliore»⁵⁸. L'iniziativa si rivelò un fallimento, tanto che il corso dovette essere sospeso per mancanza di iscrizioni. Con fatica infatti, in un quartiere che alloggiava circa duecento famiglie, si era riusciti a trovare alcune donne che frequentassero, molto saltuariamente, la scuola nonostante – si sottolineava – ricevessero «un buon vitto gratis» e vi fossero condotte dagli stessi mariti. Con rammarico si ammetteva che «se [era] relativamente facile educare alla casa l'operaia degli stabilimenti, se [era] possibile con un po' di accorgimento e di insistenza modificare la mentalità casalinga della contadina, [era] molto difficile vincere la resistenza passiva, inerte, svogliata delle massaie di città»⁵⁹. La motivazione era rintracciata nell'assoluta mancanza di un'educazione etica rivolta a questi strati della popolazione, la più abbruttita dalla povertà e dall'ignoranza.

Un altro parziale insuccesso della Scuola di educazione ed economia domestica di Bergamo furono i cosiddetti 'corsi misti'. Contemporaneamente all'istituzione di quelli popolari, infatti, il comitato direttivo dell'istituto ricevette numerose richieste affinché fossero avviati corsi d'insegnamento anche per le fanciulle appartenenti alla piccola borghesia, al ceto commerciale e alle famiglie più in vista e benestanti della città. Pur rendendosi conto che rispondere a questa istanza esulava dagli scopi originari dell'istituzione, il comitato accettò la nuova sfida. Questi corsi vennero definiti «misti» poiché le allieve, pur provenienti sostanzialmente dalla borghesia, avevano stili di vita differenti: si andava infatti da ragazze appartenenti a ricche famiglie a «signorine di famiglie modeste, figlie di commercianti o esercenti»⁶⁰. Le maggiori difficoltà si incontrarono nel dover fare i conti col differente livello culturale delle allieve: «l'insegnamento che s'impartiva e si adattava alle giovinette di modesta condizione e di limitata preparazione intellettuale, avrebbe dovuto essere svolto altrimenti per le giovinette delle classi sociali più elevate e di maggior preparazione culturale»⁶¹. Dopo questa prima esperienza il comitato direttivo ritenne indispensabile, per

⁵⁷ *L'Origine*, cit, p. 4.

⁵⁸ *Corsi casalinghi istituiti nelle "case popolari"*, «Bollettino del comitato bergamasco per le scuole di Educazione ed Economia Domestica», n. 4, 1927, p. 12.

⁵⁹ *Ibid.*

⁶⁰ *Corsi misti*, «Bollettino del comitato bergamasco per le scuole di Educazione ed Economia Domestica», n. 4, 1927, p. 13.

⁶¹ *Ibid.*

la felice riuscita del corso, una certa omogeneità culturale e sociale delle alunne iscritte.

La Scuola di educazione ed economia domestica di Bergamo venne anche chiamata a collaborare col sistema scolastico nazionale. La legge Orlando dell'8 luglio 1904, infatti, aveva prolungato l'obbligo di frequenza fino ai dodici anni, prevedendo l'istituzione di un 'corso popolare' formato dalle classi V e VI, pensato per quei ragazzi che si sarebbero avviati al lavoro alla conclusione del ciclo elementare. Il programma del corso popolare femminile comprendeva anche alcune nozioni di economia domestica, ma si trattava di nozioni esclusivamente teoriche, «un imparaticcio mnemonico privo di ogni pratica efficacia»⁶². La città orobica pensò quindi di integrare le nozioni teoriche con corsi di esercitazioni pratiche, sotto la direzione di maestre di economia domestica preparate dalla scuola di Bergamo. Il comitato direttivo dell'istituto fu riluttante nell'accettare tale compito, poiché si faticava a comprendere l'utilità di tale insegnamento per ragazze fra gli undici e i quattordici anni. I primi esperimenti, tuttavia, presero avvio a partire dal 1910 e si dimostrarono, contro ogni previsione, positivi. Le allieve diedero prova di essere molto recettive, in parte perché prive «nella loro esistenza di preoccupazioni o distrazioni», in parte perché l'insegnamento si rivolgeva a ragazze che, frequentando ancora la scuola, erano avvezze allo studio. Anche l'iniziale timore del comitato, secondo cui le ragazze – una volta entrate negli opifici – avrebbero presto dimenticato le nozioni apprese, venne fugato. Si constatò, infatti, come le fanciulle non si limitassero alle esercitazioni scolastiche, ma applicassero a casa ciò che apprendevano al corso, acquisendo abitudini che sarebbe stato difficile perdere. Si appurò dunque che molte alunne si sostituivano alla mamma nel disbrigo di piccole faccende domestiche, divenendo probabilmente a loro volta «piccole apostole» di educazione ed economia domestica nelle proprie case⁶³.

In pochi anni, comunque, la Scuola di educazione ed economia domestica, nata come esperienza isolata in Italia, divenne un modello per le analoghe istituzioni che cominciarono a sorgere qua e là lungo la penisola. Nel 1915, ad esempio, il comune di Milano realizzò un corso quadriennale noto come Scuola della massaia la quale propose un curriculum in grado di formare sia quelle giovani che avrebbero lavorato nelle fabbriche e nei laboratori tessili, sia quelle ragazze destinate a un ruolo casalingo di mogli e madri. L'esito di tale esperienza fu, tuttavia, molto diverso e il corso dovette essere chiuso poco dopo⁶⁴. Ad attestare, comunque, non solo la primogenitura della Scuola di

⁶² *Corsi scolastici*, «Bollettino del comitato bergamasco per le scuole di Educazione ed Economia Domestica», n. 4, 1927, p. 14.

⁶³ *Ibid.*

⁶⁴ Nata nell'ambito delle Scuole festive superiori femminili del comune di Milano, la Scuola della massaia fu sostanzialmente un insuccesso ed ebbe vita breve. Per un approfondimento cfr. C. Ghizzoni, *Le Scuole superiori femminili del Comune di Milano dall'Unità alla Grande Guerra*, in Ghizzoni, Polenghi, *L'altra metà della scuola*, cit., pp. 208-214.

educazione ed economia domestica di Bergamo, ma anche il suo ruolo di traino contribuisce una circolare emanata nel 1911 dal Ministero di agricoltura, industria e commercio, cui competeva la direzione dell'istruzione professionale⁶⁵. Il documento tratteggiava la situazione del lavoro extradomestico femminile in Italia sottolineando, da un lato, come esso avesse contribuito non solo a migliorare il bilancio domestico, ma anche la vita economica del Paese; dall'altro come, invece, avesse alterato la «compagine familiare». La circolare esponeva gli stessi timori che avevano condotto alla nascita della Scuola di educazione ed economia domestica di Bergamo, primo fra tutti quello che una giovane sottratta negli anni della formazione alle cure materne dal lavoro in fabbrica non sarebbe stata in grado di occuparsi in modo adeguato del focolare domestico. A questo punto il documento, dopo un breve ragguaglio sulle esperienze di corsi e scuole di economia domestica esistenti sul territorio nazionale, focalizzava l'attenzione sull'esperienza di Bergamo, sulla struttura dei suoi corsi e sulla metodologia utilizzata, proponendola – di fatto – come esempio. La circolare, indirizzata ai proprietari e ai dirigenti di opifici e aziende agricole, raccomandava a costoro di agevolare la nascita di simili strutture, definite «provvide e salutari». Da parte sua il Ministero si diceva «deciso a promuovere il sorgere e il propagarsi di tali scuole, integrando con aiuti convenienti l'azione di sodalizi e di persone altamente benemeriti» e confidando «nella [...] filantropia degl'industriali e degli agricoltori»⁶⁶.

Nonostante le promesse statali, sembra che la scuola potesse contare più su sovvenzioni private che sul sostegno di denaro pubblico. Ciò emerge chiaramente nel 1915 da un articolo polemico, breve ma deciso, pubblicato sul «Bollettino del comitato bergamasco per le Scuole di Educazione e di Economia Domestica», fondato da Anna Perico Baldini proprio in quell'anno⁶⁷. Il pezzo, significativamente intitolato *Fatti e parole del Ministero di agricoltura*, poneva in luce lo scarto esistente fra le enunciazioni teoriche delle istituzioni e gli interventi pratici a sostegno delle iniziative avviate dalle scuole di economia domestica. Nonostante, infatti, l'impegno dispiegato da queste ultime nelle campagne nella lotta contro la pellagra, che mieteva ancora numerose vittime fra i contadini, e gli sforzi prodigati per combattere fra le popolazioni rurali gli

⁶⁵ Cfr. Circolare n. 2 del 5 gennaio 1911 ai signori proprietari e dirigenti degli opifici industriali e delle aziende agricole, relativa ai Corsi temporanei di economia domestica, cit., pp. 9-11.

⁶⁶ *Ibid.*, p. 11.

⁶⁷ Il *Bollettino* era nato con lo scopo di veicolare gli insegnamenti della Scuola a tutte le «buone massaie», ma aveva soprattutto la finalità di mantenere vivo il rapporto delle ex alunne con la scuola stessa. Gli articoli ribadivano quelle che erano le tematiche affrontate nei corsi, ma con aggiornamenti costanti, mentre rubriche come *Cronaca delle Scuole di Educazione Domestica* servivano a conservare i contatti con le allieve licenziate dalla scuola di Bergamo e ora «sparse nelle varie Provincie d'Italia, comprese Trento e Trieste». Per un approfondimento sul «Bollettino del comitato bergamasco per le scuole di Educazione ed Economia Domestica» e sui vari cambi di testata cfr. G. Chiosso, *La stampa pedagogica e scolastica in Italia (1820-1943)*, Brescia, La Scuola, 1997, pp. 119-121 e pp. 275-276.

errori connessi all'alimentazione maidica, il Ministero aveva negato alle scuole di economia domestica i sussidi messi a disposizione per i «provvedimenti profilattici di carattere agrario-pellagrologico»⁶⁸. Nell'articolo si ricordava proprio la circolare ministeriale del 1911 e gli impegni economici ministeriali in essa garantiti: «L'azione di sodalizi e di privati non è mancata. Vorrebbe mancare alla promessa il Ministero di Agricoltura?»⁶⁹. Nonostante si auspicasse un ulteriore impegno finanziario da parte dello Stato, il mese successivo si comunicava con orgoglio sul *Bollettino* che erano stati concessi alla Scuola di educazione ed economia domestica di Bergamo un sussidio di mille lire dal Ministero della Pubblica istruzione e una sovvenzione di cinquecento lire dal Ministero dell'Interno che, tra l'altro, si dichiarava «dolente di non potere, per la disponibilità limitata dei fondi stanziati in bilancio, dare un sussidio maggiore»⁷⁰. Il Comitato della Scuola si dichiarava pronto ad aumentare ulteriormente il proprio impegno nell'educazione domestica «per corrispondere sempre maggiormente ai fini propostosi ed insieme per dimostrare al Governo che lo aiuta, tutta la propria riconoscenza»⁷¹.

La situazione internazionale, frattanto, si era fatta incandescente fino a precipitare nel giugno 1914 quando, a Sarajevo, venne assassinato l'arciduca ereditario d'Austria Francesco Ferdinando. L'Italia proclamò la propria neutralità, avvalendosi di un'interpretazione letterale del trattato della Triplice Alleanza, che aveva un carattere difensivo. All'interno dei partiti politici e dell'opinione pubblica si formarono due correnti di pensiero contrapposte, quella dei neutralisti e quella degli interventisti. Di questa situazione risentì anche la Scuola di educazione ed economia domestica di Bergamo che venne percorsa da un forte sentimento patriottico. La consapevolezza che questa tipologia di istituzione dovesse essere diretta a migliorare la nazione divenne sempre più forte. Questo, ad esempio, emergeva chiaramente in un articolo scritto sul *Bollettino* della scuola nell'aprile del 1915, alla vigilia cioè dell'abbandono della neutralità da parte dell'Italia, da Stefano Balp, uno dei professori del corso normale della scuola di Bergamo, e intitolato *Le scuole di educazione domestica fattrici di benessere Nazionale*. Nello scritto veniva ripresa la tradizionale visione della famiglia come primo nucleo dello Stato e il conseguente fondamentale ruolo materno nella formazione – costruzione del cittadino. Ciò veniva però agganciato al ruolo pedagogico delle scuole di educazione ed economia domestica:

⁶⁸ *Fatti e parole del Ministero di Agricoltura*, «Bollettino del comitato bergamasco», n. 7, 1915, p. 1.

⁶⁹ *Ibid.*

⁷⁰ *Cronaca delle Scuole di Educazione Domestica. Sussidi ed incoraggiamenti alle nostre Scuole*, «Bollettino del comitato bergamasco», n. 8, 1915, p. 7.

⁷¹ *Ibid.*

Perché la Patria sia forte occorre che la sua prima unità, cioè la famiglia, sia salda, sana e forte. Perché la famiglia sia sana, forte, vigorosa occorre formare, educare la madre di famiglia. Da noi, purtroppo, coi mastodontici programmi che si sono escogitati per l'educazione della donna sembra che si sia mirato a costituire la più antipatica delle creazioni: il terzo sesso. Nulla in essi che tenda a farne la donna di casa [...]. Qui a Bergamo noi abbiamo tentato di portare quest'insegnamento nel campo pratico e siamo riusciti a vincere l'apatia delle masse. Questo è il nostro contributo a ciò che ora si chiama *mobilitazione civile*. [...] Bisogna affidare alle madri la difesa della patria e della nazione, bisogna preparare l'avvenire educando le madri a saper crescere sane e forti le nuove generazioni, ed allora avremo la patria forte nell'ora del pericolo⁷².

Nel frattempo si erano andate sempre più approfondendo le divergenze fra Italia e Austria, per cui Salandra e il ministro degli Esteri Sidney Sonnino intensificarono le trattative con le potenze della Triplice Intesa che si conclusero, il 26 aprile 1915, con la stipulazione del Patto di Londra, attraverso il quale l'Italia si impegnava a scendere in guerra entro un mese a fianco dell'Inghilterra, della Francia e della Russia. Il governo italiano abbandonò dunque la propria neutralità per dichiarare guerra all'Austria-Ungheria. Il cruciale momento veniva registrato anche dal «Bollettino del comitato bergamasco per le scuole di educazione e di economia domestica». Nel numero di giugno si chiariva qual era il compito della scuola «nell'ora presente» partendo dalle parole di Salandra che, si spiegava alle lettrici, ponevano «le basi granitiche della giustizia e della legittimità alla guerra, che si sta oggi combattendo fuori delle nostre frontiere fittizie, verso quelle che la natura ci largì»⁷³. «Fidenti nella vittoria finale», cittadini e istituzioni dovevano dare il proprio contributo e quello che la Scuola di educazione ed economia di Bergamo si propose fu duplice: da una lato studiare tutto ciò che poteva avere attinenza ai problemi legati all'alimentazione «sana e a buon mercato» in un periodo difficile quale quello bellico, dall'altro – in accordo col Comitato cittadino per la mobilitazione civile – organizzare cucine popolari. Queste ultime, secondo i promotori, si rendevano necessarie poiché le donne erano chiamate, a causa dell'emergenza bellica, a sostituire nei più vari lavori gli uomini partiti per il fronte. Un gran numero di madri di famiglia si trovava così impiegato in opifici, magazzini o nel disimpegno di lavori a domicilio, dovendo necessariamente trascurare le mansioni di «buona massaia», prima fra tutte quelle della cucina. Inoltre, considerato il rincaro dei viveri, si faceva notare come spesso molte famiglie non potessero più permettersi derrate fondamentali per una nutrizione adeguata. Le cucine popolari, funzionanti sotto la guida di una maestra licenziata dal corso normale della Scuola di Bergamo, da un lato educavano le giovani donne appartenenti alle famiglie dei richiamati a far acquisti in modo oculato, a scegliere e controllare i prodotti e a «comporre delle

⁷² *Le scuole di educazione domestica fattrici di benessere Nazionale*, «Bollettino del comitato bergamasco», n. 1, 1915, p. 2.

⁷³ *Il compito della scuola nell'ora presente*, «Bollettino del comitato bergamasco», n. 3, 1915, p. 2.

razioni sane, gustose, sufficienti e di mitissimo costo», dall'altra preparavano e fornivano alle famiglie dei soldati «pranzi che [venivano] apprezzati e sempre più ricercati»⁷⁴. Nei mesi successivi sul *Bollettino* della scuola si moltiplicarono i consigli alimentari, volti soprattutto alla limitazione del consumo di carne, alimento che aveva subito un forte rincaro. «Il rialzo del prezzo delle carni non deve impressionare la brava massaia», si scriveva, consigliando di fare maggior uso del pesce o delle uova perché l'uovo cucinato nella cenere sfidava «tutti i pandemoni raffinati della ghiottoneria», mentre la frittata con patate era un piatto eccellente «per lo stomaco robusto dei lavoratori»⁷⁵. Si consigliava poi di economizzare su tutto, in modo particolare sul vestiario: «Per massima, in questi momenti, non comperate niente di superfluo. Vestitevi secondo la vostra condizione, secondo la vostra età e i vostri mezzi. Ricordatevi che la semplicità anche nel vestire è l'ideale del bello. [...] Una persona ordinata sa portare bene un vestito anche se questo non è nuovissimo»⁷⁶.

La Scuola di educazione ed economia domestica di Bergamo e il suo bollettino mensile non solo, quindi, continuavano a impartire, traendo spunto dalle difficoltà belliche, insegnamenti preziosi, ma si facevano anche portatori di un ben delineato modello di donna, una donna che – pur utile alla patria – non doveva abbandonare il proprio ruolo domestico. Quando i venti di guerra iniziarono a spirare anche sull'Italia, gli articoli in tal senso si moltiplicarono. A essere stigmatizzata era la figura dell'infermiera «da campo» improvvisata. Un sempre più diffuso sentimento patriottico aveva, infatti, fatto presa su molte giovani che desideravano essere mandate al fronte a curare i feriti, in modo da essere concretamente d'aiuto alla patria. Indicativo a tale proposito è un racconto pubblicato sul «*Bollettino*» nel maggio del 1915, alla vigilia dell'entrata in guerra dell'Italia. Nello scritto si fingeva che una giovane donna, moglie e madre, chiedesse allo zio – generale dell'esercito – una sorta di «raccomandazione» per essere iscritta come infermiera nella Croce Rossa poiché, in un momento tanto importante per la patria, la giovane sentiva «troppo misero» lo scopo della sua vita: «i bei ricami, il rame lucido, le guardarobe ben fornite, gli ambienti tenuti alla perfezione, sono una cosa bellissima, ma assai misera, troppo misera!»⁷⁷. Lo zio rispondeva alla nipote che per essere utili alla patria era sufficiente che ognuno svolgesse bene il proprio dovere, esattamente come facevano i soldati: «non si può far quello che si vuole, ma quello che si deve». E il dovere della ragazza veniva individuato nell'essere accanto alle figlie e al marito e nel gestire le faccende domestiche poiché la motivazione che spingeva a scegliere la carriera d'infermiera non poteva essere quella di «distinguersi» dalle altre donne o quella di voler compiere qualcosa di «singolare importanza»: «Tutto

⁷⁴ *Ibid.*, pp. 2-3.

⁷⁵ *L'alimentazione pubblica durante la guerra*, «*Bollettino del comitato bergamasco*», n. 4, 1915, pp. 2-3.

⁷⁶ *Economizziamo...*, «*Bollettino del comitato bergamasco*», n. 7, 1915, p. 2.

⁷⁷ *Il dovere delle donne di casa*, «*Bollettino del comitato bergamasco*», n. 2, 1915, p. 2.

ciò non si fa per sport. Non è ch'io dica che tutte le donne debbano fare la stessa cosa. Dico soltanto che chi ha casa e bambini è legata là dal suo primo dovere. Altre che possono, che hanno talenti speciali, è bene che diventino infermiere e mediche»⁷⁸.

Era comunque fortemente ribadita l'importanza dei compiti della donna per il benessere della nazione e, anche sul *Bollettino*, non mancarono momenti di esaltazione nazionalista. Si rivendicava con orgoglio, ad esempio, che la «signorina Luigia Ciappi» era stata fra le allieve del corso normale della Scuola di educazione ed economia domestica di Bergamo nel 1912. Luigia Ciappi nel giugno 1915 si era resa protagonista di un curioso fatto di cronaca che il *Bollettino* non mancò di annotare. La giovane, cui era stato negato di prestare la propria opera come infermiera presso le truppe non avendo frequentato i corsi speciali di preparazione, aveva pensato di ricorrere a un altro espediente pur di poter dare il suo contributo «alla difesa e alla grandezza d'Italia»⁷⁹. Travestita da soldato, infatti, era riuscita a farsi arruolare e a partire da Firenze per Bologna dove, con suo grande dolore, avevano smascherato il suo travestimento. Luigia, che era maestra, a questo punto aveva dovuto far ritorno fra le sue allieve. Il *Bollettino* la descriveva in termini lusinghieri, lasciandosi contemporaneamente trascinare da un forte orgoglio patriottico:

Giovine di larga cultura, essa ha sempre manifestato i più alti sentimenti di italianità, dedicando il suo sapere e la sua energia all'educazione del popolo. [...] La nostra giovane maestra seguì con trepidanza e con passione le fasi del grande conflitto europeo e quando seppe dell'intervento italiano, la sua anima ebbe fremiti di entusiasmo, pensando alle nuove glorie patrie ed al prossimo riscatto delle terre irredente⁸⁰.

L'articolo si concludeva inviando alla giovane un «vivissimo plauso» e sottolineando, comunque, come l'ex allieva avrebbe potuto rendere notevoli servizi alla patria e contribuire «grandemente alla vittoria» anche dal suo posto di maestra⁸¹.

I toni e gli argomenti affrontati dal *Bollettino* non mutarono lungo tutto il conflitto mondiale, così come, pur tra mille difficoltà continuarono i corsi e le attività della scuola di Bergamo. Quest'ultima, a partire dal dicembre 1919, fece cessare le pubblicazioni (che ripresero solo nel 1927) del suo organo di stampa a causa del «troppo costo delle stampe»⁸². Diventa così più difficile seguire la vita dell'istituzione bergamasca che, con l'avvento del fascismo e il tentativo di quest'ultimo di appropriarsi dell'insegnamento dell'educazione domestica, entrò in una diversa fase della sua vita⁸³. Va indubbiamente ascritto alla Scuola

⁷⁸ *Ibid.*

⁷⁹ *Da maestra a soldato*, «Bollettino del comitato bergamasco», n. 3, 1915, p. 1.

⁸⁰ *Ibid.*, p. 2.

⁸¹ *Ibid.*

⁸² Chiosso, *La stampa pedagogica e scolastica in Italia (1820-1943)*, cit., p. 120.

⁸³ Per un approfondimento sulla scuola bergamasca durante il periodo fascista cfr. C. Innocenti,

di educazione ed economia domestica di Bergamo e al suo comitato direttivo il merito di aver individuato un'esigenza sociale, fra modernità e tradizione, e di aver cercato, sebbene con toni a volte paternalistici, di migliorare le condizioni della classe operaia e contadina attraverso l'educazione femminile, tenendo conto delle peculiari caratteristiche del territorio e aprendosi contemporaneamente alle più moderne istanze europee. Un tentativo tenace e appassionato che merita di riemergere dall'oblio.

The Educational System in the Slovak Region of the Czechoslovak Republic (1918-1930)

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ABSTRACT: The complex changes which took place in the political systems of the central European region after 1918 were manifested in all spheres of public life. The following study focuses on specific features of the educational system in the Slovak territory after the First World War. The study deals with major issues that occurred as a result of the post-war situation and were closely related to the formation of the new Czechoslovak state. Besides some key factors which influenced the transformation and development of education (legislation, the issue of language and national identity), it also discusses individual levels of education. In relation to the changes in the system of education in the studied period, the spread of female education in its various institutionalized and non-institutionalized forms is mentioned. The final part of the paper deals with *Ústav Milana Rastislava Štefánika* [the Institute of Milan Rastislav Štefánik] which contributed significantly to the education of women in the interwar period.

EET/TEE KEYWORDS: Educational System; Women's Education; Slovakia; XX Century.

Introduction

After the First World War, the situation in central Europe was rather complicated¹. The dissolution of the Austro-Hungarian Empire and formation of new states meant that former systems of administration had to be modified to reflect an altered status quo. Significant changes in society naturally included the school system and education in general. This study focuses particularly on the education and school system in Slovakia. The geographical focus is based on the fact that even though Slovakia was part of the Czechoslovak state, certain specific aspects – notably a different language and national identity – were the main reasons why it is not possible to see Czechoslovakia as a homogenous state. These differences were even strengthened by the history of education in both parts, which had followed slightly different paths² and which also influenced the system of education after the First World War.

The following study presents the system of education in Slovakia in order to offer not only a complex overview in terms of legislation but also to introduce and cover different types of schools and the content of various levels of education, and, due to the fact that the research period brought significant changes and progress in female education (girls and women), the paper also presents this aspect of education. As an example of female education, the paper describes *Ústav Milana Rastislava Štefánika* [the Institute of Milan Rastislav Štefánik] founded in 1926 in Turčiansky Sv. Martin. The activity of the institute transcended the northern region of Slovakia, and therefore, the paper argues, it played a major role in the stimulation of further educational activities and development of female education in the Slovak region of Czechoslovakia.

1. The system of education in the Slovak region after 1918. Legislation, organization and control mechanisms of the educational system

After the Czechoslovak Republic was established in October 1918, several practical matters related to the foundation of a new state needed be dealt with, including its educational system. The system was not unified as a result of the different history and inclusion of the Czech countries and Slovakia,

¹ See M. Zemko, V. Bystrický (edd.), *Slovensko v Československu 1918-39* [Slovakia in Czechoslovakia 1918-39], Bratislava, Veda, 2004; B. Ferenčuhová, M. Zemko (edd.), *V medzivojnovom Československu 1918-39* [The Interwar Czechoslovakia 1918-39], Bratislava, Veda, 2012; V. Bystrický, D. Kováč, J. Pešek, *Kľúčové problémy moderných slovenských dejín* [Key Problems of the Modern Slovak History], Bratislava, Veda, 2012; V. Olivová, *Dějiny první republiky* [History of the First Republic in Czechoslovakia], Prague, Karolinum, 2000.

² The Slovak region belonged to the Hungarian system of education, while the Czech part was included in the Austrian system.

respectively, in the Austro-Hungarian Monarchy. Due to differences between the two educational systems, and according to Act 11/1918, the Slovak school system functioned (until 1919) on the basis of Acts 38/1868 and 1891 of the Hungarian Ministry of Education. In terms of its founder, there were state schools, church schools, private schools and town schools (founded by towns)³.

The Ministry of Education and National Public Education established in Prague maintained the former three-degree structure of education⁴. So-called folk education (caretaking institutions for children, folk and town schools) represented the first degree. The second degree consisted of secondary schools (classical grammar schools/gymnasia; so-called real schools and reformed real grammar schools/gymnasia)⁵ and technical schools (focused either on economics, industry or some other professional field)⁶. The third degree included university education; in the Slovak region, there was the University of John Comenius with three faculties (medicine, law and philosophy) established in 1919⁷.

The first Slovak institution for the management of the educational system was *Školský referát Ministerstva školstva a národnej osvety* [School Office of the Ministry of Education and National Public Education] created in Bratislava on the basis of Act 64 of 10 December 1918⁸. The Office was led by Anton Štefánek⁹ and structurally was subordinated to the Ministry of Education in

³ E. Kázmerová, *K vývinu štruktúry školstva na Slovensku v rokoch 1918-39* [On the History of the School System in Slovakia in 1918-39], in Zemko, Bystrický (edd.), *Slovensko v Československu 1918-39* [Slovakia in Czechoslovakia 1918-39], cit., p. 417. For legislation, see *Sbírka zákonů a nařízení státu československého z roku 1918* [Body of Laws and Orders of the Czechoslovak State of 1918], p. 2.

⁴ Act N. 2, 2nd November 1918 established *Úrad pre správu vyučovania a národnej osvety* [Office for the Administration of Education and National Public Education]. Later, the office was known as *Ministerstvo školstva a národnej osvety* [Ministry of Education and National Public Education]. See *Sbírka zákonů a nařízení státu československého z roku 1918* [Body of Laws and Orders of the Czechoslovak State in 1918], p. 1.

⁵ A student's admission was based on an interview in which the applicant (minimally ten years old) proved they had the requisite knowledge. See O. Placht, F. Havelka, *Příručka školské a osvětové správy* [A Handbook of School and Edification Administration], Prague, SPN, 1934, pp. 801-805.

⁶ The reform of secondary education in Slovakia was based on Act N. 293/1919 of 27th May. The act was valid for the whole Czechoslovak Republic and determined, e.g. curricula, course books, requirements for admission of students, school leaving exam, etc. See Placht, Havelka, *Příručka školské a osvětové správy* [A Handbook of School and Public Education Administration], cit., p. 575.

⁷ The name of the university was established by governmental order N. 595 11th November 1919. Ferenčuhová, Zemko (edd.), *V mezivojnovom Československu 1918-39* [Interwar Czechoslovakia 1918-39], cit., pp. 156-157.

⁸ The act (Article 3) also established Slovak as the official language in Slovakia.

⁹ Anton Štefánek (1877-1964) was a Slovak sociologist, journalist and university teacher. He was an active member of scientific organizations, e.g. Société sociologique in Geneva. From 1918 to 1924, Štefánek worked as an education officer at Ministerstvo s plnou mocou pre správu Slovenska [Ministry with the Supreme Authority for Administration of Slovakia], and from 1928 to 1929, he was a minister of education and national edification. In 1945-46, he was a rector of the

Prague. Its responsibilities included supervision, pedagogical, administrative and financial issues, personal appointments and suspension of teachers, etc.¹⁰ The Slovak School Office was the highest state authority in primary education. Its inspectors directed and controlled lower types of schools, such as folk schools and town auxiliary schools, from the district centres¹¹. Secondary schools were controlled directly by the school inspectors of the Ministry. In general, school inspectorates were supervised by the Ministry of Education and oversaw the implementation of school legislation in a specific district. Once a year, inspectors visited schools and checked documentation, curricula, lesson plans, class administration documents, the use of recommended course books and other aids¹². A general inspection took place once every six years at secondary schools¹³.

Administration, organization and coordination of school offices were based on Act 292/1920 of 9th April. The act specified the spheres of activity of school offices (from the ministry to towns and villages) as well as the system of supervision¹⁴.

Slovak University (Comenius University). For further information see: E. Turčan, *Anton Štefánek. Vedec, politik, novinár* [Anton Štefánek. Scholar, Politician, Journalist], Bratislava, Veda, 2011; E. Kázmerová, *Anton Štefánek a slovenské školstvo v prvých poprevratových rokoch (1918-1923)*, «Historický časopis», n. 4, 2011, pp. 687-704.

¹⁰ Kázmerová, *K vývinu štruktúry školstva na Slovensku v rokoch 1918-39* [On the History of the School System in Slovakia in 1918-39], cit., pp. 418-421.

¹¹ A county with the towns belonging to its district formed a school district. A school inspector worked in one district only. From 1st January 1923, the order on county administration was established (six of the so-called big counties) and school inspectorates acquired a new sphere of activity. In 1923, the Bratislava County had 9 inspectorates, the Nitra County 7, the Považie County 8, the Zvolen County 10, the Podtatranská County 7 and the Košice County 13. Inspectorates were fully subordinated to the office in Bratislava. In 1934, there were 53 school inspectorates in the area of Slovakia, in Subcarpathian Rus, there were 13 inspectorates. Placht, Havelka, *Průručka školské a osvětové správy* [A Handbook of School and Edification Administration], cit., p. 252; *Správy školského referátu v Bratislave 1923* [Reports of the School Office in Bratislava], vol. 4, pp. 91-98.

¹² J. Ivanovičová, *Od učiteľského ústavu k Univerzite Konštantína Filozofa* [From a Teachers' Institute to Constantine the Philosopher University], Nitra, UKF, 2009, pp. 36-37.

¹³ Kázmerová, *K vývinu štruktúry školstva na Slovensku v rokoch 1918-39* [On the History of the School System in Slovakia in 1918-39], cit., p. 421.

¹⁴ For further information see the full version of the act, in *Sbírka zákonů a nařízení státu československého z roku 1920* [Body of Laws and Orders of the Czechoslovak State of 1920], pp. 624-628.

2. Major administrative problems of management of the post-war educational system

Soon after Czechoslovakia was founded, the School Office had to solve the serious problem of school buildings. After the war, schools were often run in emergency conditions, with temporary classrooms established in military buildings, ruined castles, etc.¹⁵ There was a lack of curricula, course books, educational tools, but, first and foremost, there was a lack of qualified teachers.

The lack of teachers was caused by the fact that teachers of Hungarian origin had left Slovakia. They refused to swear the oath of office of town and folk schools of the Czechoslovak Republic based on Order N. 495 of 28th August 1919. Without the oath, they could not work as teachers¹⁶. The crisis was solved by the Office, which decided to move Czech teachers to Slovakia. There were about 1,400 Czech teachers who came to work in the Slovak territory, mostly employed at secondary schools¹⁷. Their transfer and stay was planned as temporary, until Slovak teacher training institutes could cover the demand for Slovak teachers¹⁸. The state, in order to deal with the problematic situation

¹⁵ For instance in Bratislava, Lučenec and Mukačevo.

¹⁶ The oral swearing of the oath was followed by a written document signed by the teacher and an officer present there. The text of the oath was the following: «Přisáhám a slibuji na svou čest a svědomí, že Československé republice budu vždy věren a její vlády poslušen, že budu veškery státní zákony zachovávat, své úřední povinnosti podle platných zákonů a nařízení vykonávat pilně, svědomitě a nestranně, úředního tajemství neprozradím a ve všem svém jednání jen prospěchu státu a zájmu služby budu dbáti». [I swear and promise on my honour and conscience that I will be always loyal to the Czechoslovak Republic and obey its government; that I will obey the law and do my duties and obligations diligently, dutifully and impartially; that I will keep professional secrets and all my activity will be for the state and public good]. Governmental Order N. 495 Article 1 of 26th August 1919. *Věstník ministerstva školství a národní osvěty z 1. října 1919*, s. 280 [Newsletter of the Ministry of Education and National Edification of 1st October 1919, p. 280]; *Sbírka zákonů a nařízení státu československého z roku 1919* [Body of Laws and Orders of the Czechoslovak State of 1919], pp. 699-700.

¹⁷ Ferenčuhová, Zemko (edd.), *V mezivojnovom Československu 1918-39* [The Interwar Czechoslovakia 1918-39], cit., pp. 154-155. The transfer of teachers was based on regulation N. 31152 of 30th June 1920 of the Ministry of Education and National Edification. (The regulation was based on the Act 605 of 29th October 1919 which determined orders and rules of transfer of both male and female teachers within the borders of the Czechoslovak Republic). Among transferred female teachers were, e.g. Anna Urbanová-Micková (transferred to the grammar school in Martin), Vlasta Vojířová and Marie Líšková (transferred to specialized schools in Banská Bystrica), Miroslava Pazderová-Viktorínová (transferred to specialized school in Košice), Arnoška Pustová (Liptovský Mikuláš), Anna Lejhancová-Heřmanová (Piešťany and Čadca), etc. See J. Mlynárik, *Pražané na Slovensku* [People from Prague in Slovakia], Prague, Danubius, 2000, pp. 86-116.

¹⁸ After a year in Slovakia, Czech teachers were required to take an exam in the Slovak language and were instructed to use the Czech language as little as possible. For more information on Czech teachers in Slovakia, see P. Matula, *Českí stredoškolskí profesori na Slovensku 1918/1919* [Czech Secondary School Teachers in Slovakia 1918/1919], in P. Švorc, L. Harbuľová (edd.), *Stredoeurópske národy na križovatkách novodobých dejín 1848-1918. Zborník venovaný Prof. PhDr. Michalovi Danilákovi, CSc. k jeho 65. narodeninám* [Central European Nations

– since education had formerly been in Hungarian – started to organize courses on Slovak language, geography, history and pedagogy for teachers, and lectures on civic education. Slovak course books which would address the requirements and content of new curricula were absent. The issue of course books was dealt with at the special committee for course books very soon after the foundation of the republic¹⁹. Priority was given to course books of Slovak language and history, considered significant for the creation of a common identity between Slovaks and Czechs. In the first years, Czech course books were used, to which Slovak realia were added (absent in the original Czech version of the book)²⁰. In this way, the transitional phase (with no Slovak course books) was solved.

Besides course books accredited by the ministry, there were also other course books published at the expense of the author²¹. Hungarian course books were not allowed²². From the school year 1921-22, the only course books allowed were those accredited by the ministry²³.

Further problems of the Slovak school system and administration included, for instance, economic and financial security, accommodation facilities for teachers, and a proportion of Slovak versus Czech teachers²⁴. In the school year

on the Crossroads of Modern History 1848-1918. Proceedings Published in Honour of the 65th Birthday of Prof. PhDr. Michal Danilák, CSc.], Prešov, Universum, 1999, pp. 346-532; Mlynárik, *Pražané na Slovensku* [People from Prague in Slovakia], cit.; P. Matula, *Českí stredoškolskí profesori na Slovensku 1918-38* [Czech Secondary School Teachers in Slovakia 1918-38], Prešov, Vydavateľstvo Michala Vaška, 2006.

¹⁹ The members of the committee were Jaroslav Vlček, František Drtina, Karel Kálal, Stanislav Klíma, Josef Sedláček and Bohumil Vavroušek. (S. Otčenášová, *Schválená minulosť. Kolektívna identita v československých a slovenských učebniciach dejepisu (1918-1989)* [The Authorized Past. Collective Identity in the Czechoslovak and Slovak History Course Books (1918-1989)], Košice, Filozofická fakulta UPJŠ, 2010, p. 30).

²⁰ The mentioned course book is: J. Horčíčka, J. Nešpor, *Dejepis pre slovenské občianske školy* [History for Slovak Civic Schools], Prague, 1922. See Otčenášová, *Schválená minulosť. Kolektívna identita v československých a slovenských učebniciach dejepisu (1918-1989)* [The Authorized Past. Collective Identity in the Czechoslovak and Slovak History Course Books (1918-1989)], cit., p. 37, note n. 66.

²¹ For instance: S. Klíma, *Slovenská vlastiveda. Zemepis a dejepis pre slovenské ľudové školy* [Slovak Geography and History for Folk Schools], Prešov, 1919; R. Kratochvíl, *Prehľad z dejepisu* [Overview of History], Prešov, *Štebrovo kníhkupectvo a nakladateľstvo*, 1924.

²² It is important to point out that a few Hungarian course books might be used, e.g. in foreign language teaching. Newsletter of the Ministry of Education and National Edification of 1919-1929, regulation N. 55 900 of 18th December 1919; regulation N. 62 139 of 6th February 1920.

²³ The list of accredited course books was published in «Věstníku ministerstva školství a národní osvěty» [Newsletter of the Ministry of Education and National Edification].

²⁴ Teachers were divided into categories according to the type of school; an administrator was in charge of a folk school, while a headmaster was in charge of civic (town) schools. Class teachers in folk schools were called «literary teachers»; in civic (town) schools they were called «professional teachers». Act N. 455 of 24th July 1919 repealed the requirement of celibacy for female teachers. See *Sbírka zákonů a nařízení státu československého z roku 1919* [Body of Laws and Orders of the Czechoslovak State of 1919], cit., pp. 643-644; *Činnost Ministerstva školství a národní osvěty za první desetiletí* [Activity of the Ministry of Education and National Edification in the First Decade], Prague, 1928, p. 15.

1918-19 there were 3,642 folk schools in the Slovak territory²⁵. To compare, in the school year 1921-22, there were 3,373 folk schools, while in 1937-38 the number increased to 4,297²⁶.

In terms of pedagogical journals and professional sources, there was a broad spectrum of publications, such as *Slovenská škola* [Slovak School] (1919), *Věstník učitelstva na Slovensku* [Newsletter for Teachers in Slovakia] (1919), *Slovenský učiteľ* [Slovak Teacher] (1920), *Národná škola slovenská* [National Slovak School] (1923); *Naša škola* [Our School] (1926); *Naše slovo* [Our Word] (1932), *Učiteľský pedagogický časopis* [Pedagogical Journal for Teachers] (1933) and others.

3. The Minor School Act of 1922

Further changes in the school system followed the approval of Act N. 226 of 13th July 1922, known as the Minor School Act²⁷.

The act changed and extended former acts on folk (*obecné ľudové*) and town (*občianske/mestské*) schools²⁸.

In school years 1922-23 and 1926-27, the maximum number of pupils in a folk school was 80. Gradually, the number decreased to 50 in 1932-33, and there was a requirement that in cases where the number of pupils in a school was higher, a separate (temporary) class should be formed²⁹. Compulsory subjects in folk schools included religion, civic studies and education (as a new subject), reading and writing, the official language in which lessons were taught, mathematics with geometry, nature studies, regional and national geography and history, drawing, singing, handcrafts and physical education³⁰.

Education in folk schools was learner-centred and emphasized the individual activity of pupils. According to the law, folk schools were either coeducational,

²⁵ Ferenčuhová, Zemko (edd.), *V medzivojnovom Československu 1918-39* [The Interwar Czechoslovakia 1918-39], cit., p. 157. For comparison and exact numbers, see *Štatistický prehľad škôl na Slovensku správneho odboru Referátu Ministerstva školstva a národnej osvety v Bratislave za školský rok 1922-23* [Statistical Survey of Schools in Slovakia Administered by the Office of the Ministry of Education and National Edification in the School Year 1922-23], Bratislava, 1923, pp. 1-37; M. Janota, H. Slezáková, *Štatistický výkaz o ľudových, meštianskych a stredných školách na Slovensku, školský rok 1923-24* [Statistical Survey of Folk, Town and Secondary Schools in Slovakia, School Year 1923-24], Bratislava, 1924, pp. 1-15.

²⁶ J. Bilčík, *Vývoj školstva na Slovensku do roku 1960* [History of Schools in Slovakia until 1960], «Slovenská archivistika», n. 1, 1973, p. 35.

²⁷ The act was valid for the Czech and Slovak regions of the republic and did not include the territory of Subcarpathian Rus.

²⁸ See *Sbírka zákonů a nařízení státu československého z roku 1922* [Body of Laws and Orders of the Czechoslovak State of 1922], pp. 1002-1007.

²⁹ Act N. 226 of 13th July 1922, Article 5, clause 1 and 2.

³⁰ *Ibid.*, Article 1, clause 1.

or single-sex. Gender equality was stressed in the composition of teachers; the number of male teachers and female teachers was to be equal. If there was an uneven number, at boys' schools the imbalance was to be in favour of male teachers; at girls' schools it was to be in favour of female teachers. In the case of coeducational schools, positions were filled after an open selection process. Exceptions to the abovementioned rules were in the competence of the Ministry of Education and National Public Education³¹. New curricula for folk schools were introduced in the school year 1934-1935³².

Town schools were categorized as schools of higher education in Slovakia³³. Compulsory subjects were religion, civic studies and education, the official language of study, geography and history, nature studies, mathematics and simple accounting, drawing and drafting, handwriting, handicrafts and physical education. The principles of management and housekeeping could be a separate subject³⁴.

The act of 1922 was an attempt to reorganize Slovak schools according to the Czech town-schools model. Practical implementation of the act only started in the school year 1927-1928³⁵.

First, it decreased (similarly to the Czech system) the number of classes from four to three. This led to a decline in the quality of education since it was impossible to cover the content of the former four-year course within three years. As this turned out to be a major problem, the government tried to find a relevant solution and the cancelled fourth year was replaced by so-called «year-long courses» for children from 14 to 16 years old. Year-long courses were not obligatory if children continued their education further (higher or professional/specialized)³⁶.

An important contribution of the act was the specification of compulsory eight-year-long education, from 5 to 15 years of age³⁷. The act forbade any form of modification of the eight-year-attendance of school³⁸ and specified

³¹ *Ibid.*, Article 10, clause 1 and 2.

³² J. Gašparíková, J. Weiszová, *Naše nové učebné osnovy* [Our New Curricula], «Diet'a», vol. I, n. 3, 1935, pp. 71-74.

³³ In the Austro-Hungarian Empire these schools were known as «polgárky». In Hungarian, the term is derived from the noun «a citizen/townsmán». In this system of education, these schools followed the fourth year of folk schools. There were no exams required to be admitted to school; education for boys took 6 years, 4 years for girls. At the time, the teaching language was Hungarian. After the foundation of the Czechoslovak Republic, the first town school with the Slovak language was opened in January 1919 in Brezová pod Bradlom.

³⁴ Act 226 of 13 July 1922, Article 2, clause 1; Š. Zemľa, *Význam meštianskej školy* [The Importance of Town Schools], «Diet'a», vol. I, n. 7, 1936, pp. 196-200.

³⁵ Act 226 of 13 July 1922, Article 12, clause 2.

³⁶ *Ibid.*, Article 11, clause 4.

³⁷ *Ibid.*, Article 12.

³⁸ Act 226 of 13 July 1922, Article 11, clause 2. The act allowed home schooling under condition that parents had to provide the same level of education (in terms of content) as was offered at school. In this case, children took an obligatory examination at school.

fines if a child did not attend school regularly (25-200 crowns); if a child was not registered at school (50-200 crowns). In case of repeated offences, the fine could be up to 1,000 crowns. If parents could not pay, they could eventually end up in prison (1-14 days)³⁹.

The Minor School Act was amended via governmental regulation N. 64 of 4th April 1925⁴⁰.

The unification of the Czech and Slovak town schools was dealt with in governmental regulation N. 137/1925 of 18th June 1925, which meant that Slovak town schools should be run and organized similarly to Czech schools. The regulation was effective from the school year 1925-26. Until then, students' attendance was not obligatory, only voluntary⁴¹.

4. *Higher forms of education*

Act 233 of 20 December 1935 on the founding and running of public town schools changed the organization of town schools significantly. Students' attendance was obligatory⁴². The act stated a catchment area of a maximum of five kilometres from which children attended the public town school⁴³. Naturally, there were also exceptions. Children who attended other types of secondary school, children with learning difficulties (blind, deaf-mute, less skilled, physically handicapped, etc.), children with a serious physical or psychological condition, children attending private town schools and home-educated children did not have to attend public town schools⁴⁴. The act became effective from 1 January 1936.

Secondary education in Slovakia was provided by grammar schools and specialized (professional) schools. Grammar schools⁴⁵ were divided into

³⁹ Act 226 of 13 July 1922, Article 14, clause 1.

⁴⁰ Further amendment of the act was performed by Act N. 176 of 26th June 1937 effective from 1 September 1937. See I. Gašparík, J. Hanus, *Školský radca* [School Councillor] II. part, Trnava, 1938, pp. 16-28.

⁴¹ *Sbírka zákonů a nařízení státu československého z roku 1925* [Body of Laws and Orders of the Czechoslovak State of 1925], pp. 666-670.

⁴² Act 233 of 20 December 1935, Article 22, clause 1.

⁴³ *Ibid.*, Article 22, clause 1 and 2.

⁴⁴ *Ibid.*, Article 23, clause 1.

⁴⁵ In the school year 1921-22 the numbers of grammar schools (36 altogether) was as follows: 3 grammar schools, 22 «real» grammar schools, 8 reformed «real» grammar schools and 3 «real» schools. This number did not include schools of this type with German (5 schools) or Hungarian (13 schools) language as a language of study. In the school year 1933-34, the numbers were the following: 2 grammar schools, 24 «real» grammar schools, 9 reformed «grammar» schools and 3 «real» schools (38 altogether). Eight schools used Hungarian language and three schools used German as the language of instruction. Bilčík, *Vývoj školstva na Slovensku do roku 1960 a spracovanie písomností* [History of Schools in Slovakia until 1960 and Processing of

classical grammar schools (eight-year study with compulsory Latin and Greek), «real» grammar schools (eight-year study with compulsory Latin and French, eventually English), reformed «real» grammar schools (eight-year study with compulsory Latin, with preference for modern languages, such as English, Italian or any Slavic language) in higher classes and «real» schools (focused on natural sciences)⁴⁶. «Real» grammar schools were the most popular type of grammar school, since their graduates could study at university as well as at technical school. If the graduates of a «real» grammar school wanted to study philosophy, they had to pass an additional exam in Latin; in the case of study of classical philology and theology, an exam in Greek was also required⁴⁷. All types of grammar schools were elective, which means that in order to be accepted, an applicant (usually ten years old) needed to pass an exam. The study finished with *maturita* (a school leaving exam)⁴⁸. Specialized (professional) schools were divided according to their specialization into: commercial/business schools (one-year or two-year study), industrial (higher industrial and master schools), economic (higher economic focused on agriculture, viniculture, forestry and wood processing), schools of apprenticeship and schools for female professions⁴⁹.

Studies at pedagogical institutes took four years. The institutes (in 1936) were in the following Slovak towns: Bratislava, Banská Bystrica, Levice, Lučenec, Modra, Prešov, Banská Štiavnica, Štubnianske Teplice [today's Turčianske Teplice] and Spišská Nová Ves. The Catholic institute for men was in Spišská kapitula; the institute for women was in Trnava and Levoča. Pedagogical institutes with a two-year study programme for female teachers of household studies were in Prešov (run by the state) and in Levoča (run by a convent). In order to be accepted, applicants were required to have studied at least a two-year course of specialized schooling for girls. Applicants also had to pass an entrance exam in the Slovak language, mathematics, knitting and crochet. The

Administrative Materials], cit., p. 144.

⁴⁶ As far as the proportion of girls studying at grammar schools is concerned, in the school year 1932-33, the largest number of girls studied at «real» and reformed «real» grammar schools, specifically at the «real» grammar school in Liptovský Mikuláš, at the «real» grammar school in Nové Mesto nad Váhom and the smallest number of girl students was in Žilina. See «Živena», vol. XXIV, 1934, p. 49. In 1936, the majority of secondary schools in the Slovak territory were «real» grammar schools (27), reformed «real» grammar schools (9) (Kremnica, Levice, Lučenec, Turčiansky Sv. Martin, Nové Mesto nad Váhom, Zvolen; for girls in Bratislava, Banská Bystrica, and Žilina), classical grammar schools (2, in Malacky and Prešov) and «real» schools (3, Bratislava, Košice and Žilina). According to the curricula of 1933, all schools had similar content of teaching from the first to the fourth year; later (from the fifth to the eighth year), the content of teaching depended on the type of school. See J. Pok, *Štúdium na strednej škole* [Study at Secondary School], «Diet'a», n. 8, 1936, p. 232.

⁴⁷ Pok, *Štúdium na strednej škole* [Study at Secondary School], cit., p. 234.

⁴⁸ *Ibid.*, pp. 230-31.

⁴⁹ Ferenčuhová, Zemko (edd.), *V medzivojnovom Československu 1918-39* [The Interwar Czechoslovakia 1918-39], cit., pp. 163-164.

study programme was offered every other year⁵⁰. Pedagogical institutes also tested applicants' musical ear and physical fitness⁵¹.

Business academies (public – founded by the state; private – founded by other institutions) were established on the basis of Act N. 73 of 15th February 1922. Studies at the academy lasted four years and finished with the *maturita* exam⁵². The same act also established business schools (two-year study)⁵³ and business courses (one-year study). In 1936, state industrial schools existed in Bratislava (machinery and civil engineering), Košice (machinery) and Banská Bystrica (chemistry)⁵⁴.

Specialized schools for women in the Slovak region were founded after 1918⁵⁵; the first schools ran from the school year 1919-20. A specialized school for girls founded in Turčiansky sv. Martin by the Živena society was among the first schools to be established⁵⁶. Gradually, their number in Slovakia increased to 19. Act N. 75 of 17th February 1922 directed the unification and organization of this type of school. The act also divided specialized schools for female professions into two groups: family schools (trade and housekeeping) and higher schools for women in economic professions and social work⁵⁷.

⁵⁰ J. Vacková-Chlumecká, *Dievča v praktických povolaniach* [Girls in Practical Occupations], «Dieťa», n. 9, 1936, pp. 232-234 and p. 270. Before the foundation of the Czechoslovak Republic, in the Slovak territory of the Austro-Hungarian Empire, there were 16 pedagogical institutes (out of which 7 were state institutes) for preparation of folk school teachers. Lessons were conducted in Hungarian. After the foundation of the republic, in the school year 1919-20, there were 8 state institutes with the Czechoslovak language (5 for men, 2 for women and 1 coeducational); there were three Roman-Catholic institutes, two Protestant and one Orthodox institute. *Zprávy školského referátu v Bratislave z roku 1920* [Reports of the School Office in Bratislava in 1920], pp. 61-62. In the school year 1923-24, there were 16 pedagogical institutes in the Slovak territory: 14 Slovak pedagogical institutes, 1 Ruthenian and 1 Hungarian. *Štatistický prehľad škôl na Slovensku správneho odboru Referátu Ministerstva školstva a národnej osvety v Bratislave za školský rok 1923-24* [Statistical Survey of Schools in Slovakia Administered by the Office of the Ministry of Education and National Edification in the School Year 1923-24], Bratislava, 1924, p. 15.

⁵¹ For further information on pedagogical institutes see also Ivanovičová, *Od učiteľského ústavu k Univerzite Konštantína Filozofa* [From a Teachers' Institute to Constantine the Philosopher University], cit., p. 31.

⁵² Business academies were founded for instance in Bratislava, Košice, Turčiansky sv. Martin, Banská Bystrica, Nitra, Trenčín, etc. *Sbírka zákonů a nařízení státu československého z roku 1922* [Body of Laws and Orders of the Czechoslovak State of 1922], pp. 229-234.

⁵³ Business schools of this type were in Bratislava, Košice, Banská Bystrica, Kežmarok, Nitra, Trenčín, Skalica, Dobšiná, Trnava, Turčiansky sv. Martin and Prešov (1936).

⁵⁴ Pok, *Štúdium na strednej škole* [Study at Secondary School], cit., p. 233.

⁵⁵ This type of school had already existed in the Czech part of the Austro-Hungarian Empire.

⁵⁶ J. Bilčík, *Vývoj školstva na Slovensku do roku 1960 a spracovanie písomností* [History of Schools in Slovakia until 1960 and Processing of Administrative Materials], «Slovenská archivistika», n. 1, 1974, p. 132; J. Valach, *Činnosť Živeny v medzivojnovom období* [Journal Živena in the Interwar Period], in *Kmetianum, zborník Slovenského národného múzea v Martine* [Kmetianum, Proceedings of the Slovak National Museum in Martin], 1, 2005, pp. 55-56.

⁵⁷ Act N. 75 of 17th February 1922, Article 3.

An amendment to the act was approved by Act N. 252 of 20th December 1923⁵⁸, which abolished the abovementioned types of schools and established the system of one type only – specialized schools for female professions (public or private). Public schools were financed by the state only, by the state and another institution, or by any other type of institution (e.g. a town). A private school had to have its organizational statute approved by the Ministry of Education and National Public Education. Detailed instructions about the curricula, administration, teachers, students and management were stated in *Dočasný normálny organizačný štatút odborných škôl pre ženské povolania* [Temporary Normal Organizational Statute of Specialized Schools for Female Professions], issued by the Ministry of Education and National Public Education on 7th May 1925.

An amendment was again issued by the Ministry on 17th February 1934⁵⁹. According to this, specialized schools for female professions were divided into two types:

Schools of daily study:

- specialized schools for women (two-year study) (these included schools for child-raisers/educators, schools of social work, schools for education of institutional managers, schools for milliners);
- schools of a family type (one-year study) (family schools for alumni, schools for family governesses)⁶⁰;
- pedagogical institutes for specialized schools of female professions.

Courses:

- female folk schools continual (household management and child-raising for employed women);
- schools for housemaids;
- special folk courses (sewing, crochet, vegetarian cooking, etc.)⁶¹.

According to the magazine «Diet'a» [Child] (1936), practical professions for women were divided into four major groups:

- agricultural professions (gardener);

⁵⁸ The act was not effective in the region of Subcarpathian Rus since there were no schools of this type.

⁵⁹ Placht, Havelka, *Průručka školské a osvětové správy* [A Handbook of School and Edification Administration], cit., pp. 1149-50; Bilčík, *Vývoj školstva na Slovensku do roku 1960 a spracovanie písomností* [History of Schools in Slovakia until 1960 and Processing of Administrative Materials], cit., pp. 132-133.

⁶⁰ For more information about this type of school see J. Vacková-Chlumecká, *Odborné školy pre ženské povolania na Slovensku* [Specialized Schools for Female Professions], «Živena», n. 6, 1933, p. 176.

⁶¹ Placht, Havelka, *Průručka školské a osvětové správy* [A Handbook of School and Edification Administration], cit., pp. 1151-1152. In the school year 1937-38, there were 20 specialized schools for female professions. L. Kázmerová, *Vznik a rozvoj slovenského školstva* [Origin and History of Slovak System of Education], in Ferenčuhová, Zemko (edd.), *V medzivojnovom Československu 1918-39* [The Interwar Czechoslovakia 1918-39], cit., p. 165.

- business professions (businesswoman or shop assistant);
- professional crafts⁶²;
- other housekeeping professions (cook, housekeeper)⁶³.

5. *Institute of Milan Rastislav Štefánik*

Social-medical schools were established on the basis of acts concerning specialized schools for female professions N. 75/1922 and 252/1923, since there was no act which focused particularly on such type of school⁶⁴. Due to this reason the *Institute of Milan Rastislav Štefánik* in Turčiansky sv. Martin was a specific type of school. The establishment⁶⁵ was founded on 9th August 1922⁶⁶ to meet the needs of qualified women in all fields of female professions. It was supported financially by, among others, the Slovak League of America, Czechoslovak Red Cross and Czechoslovak Republic. The official opening took place during the August festival of 1926 attended by the president T.G. Masaryk.

There were two schools in the institute's building: *The Provincial Institute for Education of Female Teachers of Specialized Schools*⁶⁷ and *The Provincial Two-Year School of Social-Medical Care*⁶⁸.

⁶² This type of education was offered in Slovakia in these towns: Bratislava, Brezno nad Hronom, Banská Bystrica, Košice, Prešov, Nitra, Trenčín and Turčiansky sv. Martin.

⁶³ Vacková-Chlumecká, *Dievča v praktických povolaniach* [Girls in Practical Occupations], cit., pp. 265-267.

⁶⁴ The act was finally issued in 1948. Bilčík, *Vývoj školstva na Slovensku do roku 1960 a spracovanie písomností* [History of Schools in Slovakia until 1960 and Processing of Administrative Materials], cit., p. 139.

⁶⁵ The site was donated by the town Turčiansky sv. Martin.

⁶⁶ A few significant personalities of social and political life were present at the foundation of the school, including Alica Masaryková (1879-1966), Elena Maróthy-Šoltéssová (1855-1939) and Štefan Kréméry (1892-1955).

⁶⁷ Minimum age for being accepted to the school was 18 years. Students practised cooking, household management and other related subjects. The study finished with the *maturita* exam (written and oral) and practical exam. A student had to prepare lunch and set the table within a specific time limit. State Archive in Nitra, the Topoľčany branch, School Inspectorate in Topoľčany 1919-1949, box 8.

⁶⁸ *Dr. A.G. Masaryková's House of Social-Medical Care for Youth* (so-called Social House) in Turčiansky sv. Martin was opened on 2 February 1933, in order to meet the needs of students' practice. The house had 38 rooms, including kindergarten, day nursery, reading room, sauna, etc. «Živena», n. 1, 1936, p. 28. See also Š. Votrubová, *Živena, jej práca a osudy* [Živena, Its Work and History], Martin, Živena, 1931; J. Tkadlečková-Vantúchová, *Živena, spolok slovenských žien* [Živena, Organization of Slovak Women] Bratislava, Epocha, 1967. On the school plan, curricula and organizational status, see: «Živena», n. 11, 1925, pp. 150-153 and pp. 218-220.

According to the annual report published in the journal *Živena*⁶⁹, in the school year 1929-1930, the institute comprised *Provincial Institute for Education of Female Teachers of Specialized Schools of Sewing*; folk courses for women; a five-month course for domestic social and medical education of women and children and *Provincial Two-Year School of Social-Medical Care*.

The latter mentioned school consisted of two parts: theoretical and practical. The practical part took place in the holiday 'colonies' and during medical and social practice. Holiday colonies accepted students for four to six weeks; medical practice was realized in the hospitals of Bratislava and took nine weeks⁷⁰. Social practice lasted two weeks and could be done in various towns in Slovakia (Bratislava, Košice, etc.)⁷¹ There were 133 folk courses at 86 places, with 2,126 participants⁷².

On 1st September 1933, *The Provincial School of Social-Medical Care* changed into *The Provincial School of Social-Medical Care and Nursing*. It comprised two schools: the school of social-medical care and the school of nursing⁷³. Studies lasted two years; the maximum number of students in a year was 24; the minimum number was 12. There was a special committee that decided on the admission of applicants. The school was led by Oľga Šimková (also the headmistress of the provincial schools of the Institute of Milan Rastislav Štefánik); the professional director was MUDr. A. Dudek (also the director of the regional hospital in Martin). Students' practice took place at Martin hospital, in Žilina and Bytča. After the course, successful participants received either a certificate of attendance (social-medical care) or a diploma (nursing)⁷⁴.

⁶⁹ «Živena», n. 11, 1930, p. 193.

⁷⁰ Four weeks were spent in children's hospital, a week in surgery, eye hospital, obstetrics hospital and venereal disease hospital respectively and a week in Masaryk's league.

⁷¹ In order to be accepted, students had to prove that they were Czechoslovak citizens, at least 18 years old, that they are physically suitable to practice social case and they finished the town school and two-year family school. While many applicants met these requirements, those who demonstrated that they had already worked at hospitals, medical institutes, children's care houses, etc., were preferred. «Živena», 1931, p. 146.

⁷² Organizational statute of folk courses was published in *Živena* in 1930. It specified, for instance, the duration of the course (from one to three months); age of the applicants (minimum 15 years old), minimum number of course participants (12). Students received confirmation about participation in the course. The subjects studied were the following: Slovak language and geography, hygiene and child care, education/-pedagogy, civic education, mathematics, food studies, housekeeping, management practice, cooking and dining. Altogether, there were 33 lessons in a course, most of them focused on cooking and dining (21 lessons). The plan of the course was authorized by the decree of the Ministry of Education and National Edification 24 February 1930. See «Živena», n. 11, 1930, pp. 242-243 and pp. 193-195.

⁷³ Minimum age of admission was 18; if an applicant was younger, she needed either her father's approval or the approval of a tutorial office. They also needed confirmation about their physical and psychological health, confirmation about former education at a town school or any other evidence of former study. See «Živena», n. 11, 1933, p. 234.

⁷⁴ For more information on the organizational statute see «Živena», n. 11, 1933, pp. 233-35

The Institute also organized free five-month courses in various places in Slovakia from the school year 1927-28. They were known as the folk courses of regional specialized schools for female professions at the Institute of Milan Rastislav Štefánik and – as far as their content was concerned – similar to the two-year school of social-medical care⁷⁵. The number of courses as well as of teachers slowly increased; while in the year 1930-31 there were 22 teachers in 103 towns, in 1932-33 their number increased to 30 teachers⁷⁶ in 151 towns with 3,441 participants⁷⁷. To organize the courses in different regions in Slovakia, there were other institutions that helped the Institute, namely the association of women *Živena*, the Czechoslovak Red Cross and later also the Office of the Ministry of Education and National Public Education in Bratislava.

Besides the abovementioned types of schools, there also existed national minority education; especially German and Hungarian.

Conclusion

The creation of an educational system which would meet the needs and requirements of the newly founded Czechoslovak state was a major question that, from the very beginning, was at the centre of political attention. The

and pp. 290-91.

⁷⁵ First and foremost, the courses put an emphasis in the needs of everyday life.

⁷⁶ Teachers of the courses were appointed by a body of curators of regional schools of the Institute of Milan Rastislav Štefánik and the board of directors decided on the place of their activity. There were so-called literary teachers (focusing on humanities and culture), specialized teachers of household management, specialized teachers of sewing and graduates of social-medical care. (From 10 February to 5 April 1933, a literary teacher Elena Hroboňová gave more than 60 lectures on topics such as The Importance of Education, Masaryk as a Philosopher, Healthy Children, etc. Specialized teachers of household management were Margita Cengelová, Anna Kobzová, Oľga Kučerová, Anna Miklendová, Anna Pézlová, Jolana Srnková, Alžbeta Svobodová-Sajtáková, Piroška Šurányiová, and Štefánia Žiaková; specialized teachers of sewing were Eudmila Bláhová, Alžbeta Březovská, Anna Kováčiková, Anna Májeková, and Baltazara Pelikánová; graduates of the school of social-medical care were Vlasta Čapková, Amáli Džavíková, Zdenka Hanušová, Jarmila Hlaváčová, Eva Ištvaníková. Vilma Kreitschiiová, Mária Kudláčková, Ida Kutinová, Johana Markovičová, Mária Pauličková, Jarmila Šrámková, and Žofia Vakúšová; teaching assistants were Ema Dvihallyová, Zuzana Péterová and Anna Uhnáková). E. Andersová, *Ludové kurzy pre ženy na Slovensku v školskom roku 1932/33* [Folk Courses for Women in Slovakia in the School Year 1932/33], Turčiansky sv. Martin, 1933, pp. 3-4, 9.

⁷⁷ Courses were organized in the following towns: Nová Baňa, Bánovce n. Bebravou, Brezno, Veľká Bytča, Čadca, Feledíneec, Gelnica, Giraltovce, Hlohovec, Humenné, Ilava, Kežmarok, Kremnica, Dolný Kubín, Levoča, Lučenec, Turčiansky sv. Martin, Michalovce, Liptovský Mikuláš, Modra, Námestovo, Nitra, Piešťany, Poprad, Prešov, Prievidza, Revúca, Rožňava, Ružomberok, Senica, Rimavská Sobota, Šaľa, Šahy, Topoľčany, Trenčín, Trnava, Trstená, Spišská Nová Ves, Zvolen and Žilina. Cfr. Andersová, *Ludové kurzy pre ženy na Slovensku v školskom roku 1932/33* [Folk Courses for Women in Slovakia in the School Year 1932/33], cit., pp. 5-8.

problems of building an effective and functional system of education related to different regional historical developments within the former Austro-Hungarian Empire. This was reflected, for instance, in the formation of specialized education for women, which had no tradition in the area of Slovakia. The first specialized schools for girls and women were strongly influenced by ideas about womanhood of the time; this is clearly seen in the content of the curricula and courses organized for women. As a study case, the paper discussed the Institute of Milan Rastislav Štefánik, whose impact on female education in Slovakia was unique and fundamental and represented a major contribution to the future development of female education in the Slovak region.

La sección femenina de la Falange española y su papel en la formación de la mujer rural durante la dictadura del General Franco

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The 'women's section' of the Spanish Falange and its role in the education of rural women during the dictatorship of General Franco

ABSTRACT: In all of the totalitarian states of twentieth-century Europe, the political parties that sustained them created women's organizations dedicated to serve the new political order both as instruments of ideological indoctrination and as the means to develop a specific model of 'woman'. This model generally subordinates a woman to a man, situating her primarily in the domestic domain as wife and mother. In Spain, this political party was the Spanish Falange and, within that organization, a *Sección Femenina* (Women's Section) emerged that maintained and significantly increased its activity between 1934 and 1977. Upon completion of the Civil War, with the victory of the rebel soldiers, the new dictatorial regime led by General Franco, fused together in the so-called *Movimiento Nacional* (National Movement) its various political sources, including the Falange, forming an ideological magma known as National-Catholicism. The Women's Section, while retaining its Falangist inspiration, was fully integrated into the mechanisms of the Movement and the State, basically discharging two types of functions: social relief or welfare and the education of women, especially in rural areas. Over the course of its history, this organization would launch many institutions and educational programs, among which stands out a program of traveling or itinerant schools, «Cátedras Ambulantes» made, in a way, in the image of the *Misiones Pedagógicas* (Educational Missions), which had been very active during the Second Republic.

EET/TEE KEYWORDS: Women's Education; Rural Population; Fascism; Franco Regime; Spain; XX Century.

Introducción

La década de los años '30 del siglo XX fue extraordinariamente convulsa y trágica en España: el 14 de abril de 1931 cayó la Monarquía y fue proclamada la II República. El 18 de julio de 1936 una parte del ejército, comandada por el General Franco, se sublevó contra el gobierno republicano, nacido de unas elecciones celebradas seis meses antes, y dio así comienzo una Guerra Civil que finalizó el 1 de abril de 1939, con la victoria de los sublevados. Se instauró a continuación una dictadura militar que duró hasta la muerte del General Franco a finales de 1975.

En 1933, en una atmósfera social y política enrarecida, tensa y muy polarizada, José Antonio Primo de Rivera fundó la Falange Española, un grupo político de inspiración fascista, en cuyo seno nacería, un año después, 1934, una sección femenina, que dirigiría hasta su desaparición su propia hermana, Pilar Primo de Rivera¹. Una vez concluyó la Guerra Civil y quedó establecido un régimen de partido único conocido como el *Movimiento Nacional*, en el que se integró la Falange, la Sección Femenina recibió, entre otros, el encargo de la formación de la mujer española, sobre todo en las áreas rurales. Esa sería su principal misión².

La Sección Femenina de la Falange no fue un caso único en Europa. También en la Alemania nacional-socialista y en la Italia fascista, se crearon organizaciones femeninas con el objetivo de formar a las mujeres al servicio del partido y del Estado³. De hecho, en 1942, las tres organizaciones celebrarían en Viena un congreso de juventudes europeas, y constituirían una especie de 'triumvirato', según expresión de Anna Balletbó, con la «finalidad de orientar la educación hacia el hogar de todas las juventudes femeninas del continente»⁴.

Más adelante nos detendremos a analizar este modelo de mujer que auspició el régimen del General Franco y que se ocupó de encarnar y reproducir la Sección Femenina. El foco de nuestro argumento será, no obstante, el seguimiento, a grandes rasgos, de la evolución de esta institución, desde su origen hasta su desaparición en 1977. Inició esta larga trayectoria con

¹ M.A. Fernández Jiménez, *Pilar Primo de Rivera. El Falangismo femenino*, Madrid, Síntesis, 2008.

² P. de Vega, *El uso de la palabra Misión en el lenguaje de la prensa femenina española (1939-1945)*, «EPOS», n. 4, 1988, p. 127.

³ A. Morant, *Estado totalitario y género: el referente alemán para la Sección Femenina de Falange, 1936-1945*, «Alcores. Revista de Historia Contemporánea», vol. 13, 2012, pp. 63-83; A. Morant, *Mujeres para una "nueva Europa". Las relaciones y visitas entre la sección femenina de falange y las organizaciones femeninas nazis, 1936-1945*, Tesis Doctoral, Universidad de Valencia, 2014; J. Stephenson, *Women in Nazi Society*, London-New York, Routledge, 2013; C. Koonz, *Mothers in the Fatherland: Women, the Family and Nazi Politics* (1987), London-New York, Routledge, 2013.

⁴ A. Balletbó, *La mujer bajo la dictadura*, «Leviatán, revista de hechos e ideas», n. 8, 1982, pp. 90-101.

funciones primordialmente asistenciales, de ‘auxilio social’, pero la continuó con otras más propiamente educativas, a las que prestaremos atención especial. Desde la misma posguerra, la Sección Femenina iría poniendo en marcha innumerables centros y programas formativos y socioeducativos, en su mayoría fuera del sistema escolar reglado, entre los que merece singular mención un programa de escuelas itinerantes, las Cátedras Ambulantes⁵, que tenía evidentes concomitancias con el Cuerpo de Divulgadoras Sanitario-Rurales, vinculado a la Hermandad de la Ciudad y el Campo, y a las Granjas-Escuela⁶. Frente a estas y otras instituciones, las Cátedras gozaban de la ventaja de la movilidad. En ese sentido y salvando las distancias, podrían considerarse también herederas de las Misiones Pedagógicas, una institución igualmente móvil extraordinariamente activa durante la II República⁷. Las Cátedras, que terminarían extendiéndose por todo el país, tuvieron como destinatarias preferentes, aunque no únicas, a las mujeres de las áreas rurales, en unos momentos históricos en los que había una profunda brecha social, cultural y educativa entre el campo y la ciudad.

1. *La Sección Femenina y su misión formativa*

El 30 de Mayo de 1939, poco después del final de la Guerra Civil, se concentraron en Medina del Campo, provincia de Valladolid, las numerosas agrupaciones femeninas de la Falange. Pretendían homenajear al triunfador de la contienda y celebrar la victoria militar en un lugar de hondo significado en la historia de España y referencia clave para el nacional-catolicismo. En Medina del Campo, en el corazón de Castilla, había muerto en 1504 la reina Isabel La Católica. Y en el Castillo de la Mota, ubicado en esta localidad, situaría posteriormente Franco la Escuela de Mandos de la Sección Femenina.

Podría tomarse esa fecha de 1939 como el punto de arranque de la historia posbélica de esta institución, ya plenamente integrada en el Movimiento Nacional⁸. Había que reconstruir un país devastado⁹ y difundir los principios y valores del nuevo Estado¹⁰, y la Sección Femenina se entregaría con ahínco

⁵ H.M. Pérez Moreno, *Educación y asistencia social de una escuela errante durante el franquismo en España*, «Res, Revista de Educación Social», n. 17, julio 2013, p. 1.

⁶ S. Cayuela Sánchez, *La biopolítica en la España franquista*, Tesis Doctoral, Universidad de Murcia, 2010, pp. 290-294.

⁷ H.M. Pérez Moreno, *Dos escuelas itinerantes en la España del siglo XX*, «Revista de Ciencias de la Educación. Instituto San José de Calasanz», n. 220, octubre-diciembre, 2009, p. 403.

⁸ Sección Femenina de F.E.T. y de las J.O.N.S., *La Sección Femenina. Historia y Organización*, Madrid, 1952, p. 23. También en la obra de P. Primo de Rivera, *Discursos, Circulares, Escritos*, Madrid, Sección Femenina de F.E.T. y de las J.O.N.S.-Gráficas Afrodisio Aguado S.A., [1942?], p. 86.

⁹ Asociación Nueva Andadura (A.N.A.), Documento n. 7, *Delegación Nacional de la Sección Femenina. Breve resumen de su historia*, folio 2.

¹⁰ A. Morant, *Para influir en la vida del Estado futuro: discurso y práctica falangista sobre el*

a esa tarea. Según Encarnación Jiménez Losantos¹¹, «Franco elige a la Sección Femenina de la Falange y no reconstruye otra a partir de Acción Católica o cualquier institución de carácter caritativo, y lo hace por una cuestión pragmática del Estado». Franco sabía que la Sección Femenina mantendría su papel subordinado y secundario, y «que la adhesión y cierto control ideológico en manos de las mujeres sólo podía reportarle ventajas»¹². En efecto, la Sección Femenina, que durante la Guerra se había ocupado sólo de labores asistenciales, se reorganizó para dirigir todos sus esfuerzos a la producción de la nueva mujer española, antagonista absoluta del modelo de mujer libre y socialmente activa promovido por la II República¹³.

Esta reorientación queda claramente reflejada en el decreto de 28 de diciembre de 1939, en el que se confía a la Delegación Nacional de la Sección Femenina «la formación política y social de las mujeres españolas en orden a los fines propios de Falange Española Tradicionalista y de las J.O.N.S.»¹⁴. Tal formación tendrá como referencias fundamentales el servicio a la Patria, a la doctrina católica, a los principios nacional-sindicalistas de la Falange y el Movimiento, y al ideal de una mujer madre y esposa, dedicada a la familia y a las tareas del hogar¹⁵. Inicialmente, las destinatarias de esta formación fueron solamente las afiliadas al partido. Estas habrían de ser quienes llevarían a todas las mujeres los conocimientos y principios que habían aprendido¹⁶, con el objetivo primordial de su adoctrinamiento ideológico y adhesión absoluta al nuevo régimen político¹⁷.

Así pues, la Sección Femenina, más allá de su vinculación originaria a la Falange, quedó en buena medida integrada en las instituciones del Estado¹⁸, con funciones formativas y asistenciales o socio-sanitarias. De hecho se ocupará en adelante del llamado Servicio Social de la mujer, algo así como la alternativa femenina al servicio militar obligatorio, exclusivamente reservado a los hombres¹⁹.

papel de la mujer y la feminidad, 1933-1945, «Historia y Política. Ideas, Procesos y Movimientos Sociales», n. 27, 2012, pp. 113-141.

¹¹ E. Jiménez Losantos, *Ideología feminizadora en el franquismo, orígenes y evolución*, «Estudis d'història contemporànea del País Valencià», n. 9, 1991, p. 92.

¹² M.T. Gallego Méndez, *Mujer, falange y franquismo*, Madrid, Taurus Ediciones S.A., 1983, p. 73.

¹³ M.C. Agulló Díaz, *La educación de la mujer durante el franquismo y su evolución en Valencia (1951-1970)*, Valencia, Servicio de Publicaciones de la Universidad de Valencia (Colecciones de Tesis Doctorales en microficha), 1994, p. 162.

¹⁴ Artículo primero del Decreto de 28 de diciembre de 1939 de la Jefatura del Estado (Boletín de 29 de diciembre) en el que se recogen las funciones de la Sección Femenina y la adscripción del Servicio Social a la misma.

¹⁵ Primo de Rivera, *Discursos, Circulares, Escritos*, cit., p. 67.

¹⁶ G.M. Scanlon, *La mujer bajo el franquismo*, «Tiempo de Historia», n. 27, 1977, pp. 9 y 10.

¹⁷ A. Jarne Mòdol, *Models formals i sentimentals al servei de la fenineïtat: la postguerra a Lleida (1939-1945)*, «Ilerda», n. 49, 1991, p. 189.

¹⁸ L. Suárez Fernández, *Crónica de la Sección Femenina y su tiempo*, Madrid, Asociación Nueva Andadura, 1993, p. 115.

¹⁹ *Ibid.*

Una norma de 1940 (Decreto de 31 de mayo) establecería una duración de seis meses, en dos periodos, para este Servicio Social: uno, de formación teórica en materia religiosa, política y doméstica, y otro de prestación de un determinado servicio al Estado en algún centro oficial²⁰. Este Servicio fue, sin duda, un arma ideológica y de legitimación de un Régimen, cuya intención fue, desde un principio, pervivir indefinidamente²¹. En la misma línea puede contemplarse el encuadramiento de las jóvenes de la Sección Femenina en el llamado Frente de Juventudes, sección juvenil de la Falange Española Tradicionalista y de las JONS, el híbrido político creado por el Movimiento Nacional, a partir de tres de sus bastiones ideológicos fundamentales: el falangismo, el tradicionalismo monárquico y católico, y el nacional-sindicalismo. En cualquier caso, la dependencia orgánica de las juventudes femeninas del Frente duró sólo cinco años, hasta 1945. A partir de entonces se reintegraron en la Sección Femenina, como *Juventud de la Sección Femenina del Movimiento*²². Aunque con ciertas peculiaridades locales, todo ello se inspiraba en proyectos similares llevados a cabo en los países del Eje, especialmente en Alemania²³.

La misión formativa de la Sección Femenina fue cristalizando y ampliándose paulatinamente. En 1964 (Decreto de 25 de noviembre) se enfatiza su condición de instrumento al servicio del Estado para la transmisión de sus principios y valores²⁴. Aún en 1970, en las postrimerías del franquismo, la normativa seguía insistiendo en la perfecta incardinación de la Sección Femenina en la maquinaria del Estado y, en concreto, en su órgano ideológico por excelencia, la Secretaría General del Movimiento²⁵. Al mismo tiempo, es posible ir atisbando una tímida evolución en sus planteamientos, conforme pasaba el tiempo y el mismo franquismo modificaba el peso relativo de sus distintos ingredientes ideológicos y grupos de presión, sobre todo a partir de la segunda mitad de los años '50. A sus presupuestos clásicos en formación de la mujer, la Sección Femenina fue añadiendo algunos matices en favor de su promoción e integración limitada en la sociedad y en la vida política, en consonancia con los cambios culturales y económicos que se venían produciendo en la sociedad española, a pesar de todo, en esos años. Esta cita, que viene a ser más bien un balance final, recoge esas 'nuevas aspiraciones' a una formación de la mujer basada en el logro de una mayor autonomía personal:

²⁰ E. Posa, *Una educación especialmente femenina*, «Cuadernos de Pedagogía», vol. III, n. 31, 1977, p. 33.

²¹ A. Ferrándiz i Civil, *La Sección Femenina de FET y las JONS a Sabadell, 1939-1945*, «Arraona», n. 5, 1989, p. 43.

²² Artículo primero de la Orden de 24 de enero de 1945 (Secretaría General del Movimiento), Boletín n. 57 de 26 de febrero.

²³ Koonz, *Mothers in the Fatherland: Women, the Family and Nazi Politics*, cit., 2013.

²⁴ Artículo primero del Decreto núm. 3749 de 25 de noviembre de 1964 (Secretaría General del Movimiento), Boletín núm. 286 de 28 de noviembre.

²⁵ Artículo quinto del Decreto núm. 15 de 5 de enero de 1970 (Secretaría General del Movimiento), B.O.E. núm. 5 de 6 de enero por el que se estructura la Secretaría General.

Sería inútil pretender recoger en una página lo que ha sido un ingente trabajo de cuatro décadas. Sí creemos, en cambio, posible resumir lo que la Sección Femenina ha ofrecido y ofrece a nuestras mujeres con un sentido que se anticipó en su día a lo que hoy marcan las directrices de la moderna asistencia social: integrar al individuo en la propia comunidad y facilitarle los medios para que pueda resolver por sí mismo sus problemas²⁶.

En 1977, en los primeros compases de la transición democrática, la Sección Femenina fue suprimida por un decreto firmado por el Rey Juan Carlos y el presidente del Gobierno Adolfo Suárez, quien había sido, a la sazón, el último responsable de la Secretaría General Movimiento Nacional. Las antiguas afiliadas crearon entonces una asociación llamada Nueva Andadura, que encabezaría Pilar Primo de Rivera hasta su muerte, en 1991, y que poco después se disolvería.

2. *Esposa, ama de casa y madre, hija de dios y de la patria*

Nacional-sindicalismo, antiliberalismo y antimarxismo, vitalismo frente a intelectualismo, alegría en el sacrificio²⁷. Estas, entre otras, podrían ser algunas de las palabras clave que identifican el magma ideológico y sentimental de la Sección Femenina y, obviamente, al régimen franquista en su conjunto. Pero tal vez sean dos fuentes, el Catolicismo y la Falange²⁸, las que alimentaron sustancialmente su configuración ideológica y, en concreto, el modelo de mujer que guiaría y alentaría su actividad formativa²⁹.

Para la Iglesia Católica, la mujer soltera debía velar por su virginidad y vivir según los preceptos del dogma religioso. Para la mujer casada, la sumisión a su esposo y la maternidad debían constituir su horizonte vital. Así pues, el matrimonio (y en su defecto, la vida religiosa) es el destino deseable para la mujer, y en su seno el cuidado de la familia y el trabajo doméstico, a buen resguardo de la vida pública y la actividad política. Cualidades como la obediencia, la discreción, la abnegación y el sacrificio deben ser las que adornen su carácter y la emplacen en la vida social, como «una sombra de destino en lo universal»³⁰.

²⁶ A.N.A., Documento n. 7, *Delegación Nacional de la Sección Femenina. Breve resumen de su historia*, palabras contenidas en la síntesis de la Tercera Etapa de la trayectoria de la organización femenina, folio 2.

²⁷ Estos elementos están desarrollados en el segundo capítulo de la citada obra de Sánchez López, R., *Mujer española, una sombra de destino en lo universal. Trayectoria histórica de Sección Femenina (1934-1977)*, Murcia, Secretariado de Publicaciones de la Universidad de Murcia, 1990.

²⁸ Agulló Díaz, *La educación de la mujer durante el franquismo y su evolución en Valencia (1951-1970)*, cit., pp. 134-191.

²⁹ C. Flecha García, *Algunos aspectos sobre la mujer en la política educativa durante el régimen de Franco*, «Historia de la Educación», vol. VIII, 1989, p. 77.

³⁰ R. Sánchez López, *Mujer española, una sombra de destino en lo universal. Trayectoria histórica de Sección Femenina de Falange (1934-1977)*, Murcia, Universidad de Murcia, 1990.

El modelo de mujer que defiende la Falange no dista de este elenco de atributos, pero, sin ser contrapuesto, es distinto del que debiera representar la militante falangista. En ella deben primar, además de esas, otras virtudes, como el valor, la audacia, la capacidad de mando, y la sublimación de su sexualidad. Y como sus tareas primordiales, la participación activa en la vida política, encarnando los principios ideológicos del Movimiento y formando en ellos a otras mujeres³¹.

La Sección Femenina se adhirió con entusiasmo y determinación al nacional-catolicismo, promoviendo, pues, dos modelos de mujer: uno, para una élite selecta (el de las mujeres falangistas consagradas al servicio del Régimen)³² y otro, para la masa femenina. Las primeras protagonizaron un conjunto de acciones educativas dirigidas a las segundas, para las que movilizaron recursos humanos y materiales ingentes, y lograron una importante presencia social en la generalidad de la geografía española. Su arquetipo femenino, en cierto modo sintetizable en la fórmula de las tres K alemanas *Kinder, Küche und Kirche* (Niños, Cocina e Iglesia), asignaba a la mujer un conjunto de roles circunscritos al hogar, como esposa y madre que asume y transmite el credo político y religioso del Estado a sus hijos. La que fuera perpetua Delegada Nacional de la Sección Femenina, Pilar Primo de Rivera, expresa nítidamente con estas palabras cuál es el modelo femenino que su organización debía promover:

Para orientar la formación de la Sección Femenina, vamos a inspirarnos como siempre en «José Antonio»: decía él que hay que volver a poner al hombre los pies sobre la tierra. Y para la mujer, la tierra es la familia. Por eso, [...] tenemos que apegarlas con nuestras enseñanzas a la labor diaria, al hijo, a la cocina, al ajuar, a la huerta; tenemos que conseguir que encuentre allí la mujer toda su vida y el hombre todo su descanso. Que tenga una formación moral tan justa que sepa distinguir claramente el bien del mal; que no duerma tranquila una noche si por causa de ella, o por negligencia suya, se ha cometido una injusticia; que el espíritu de Cristo anime su vida, y que tenga siempre como norma la doctrina de Falange, que es toda ella claridad, limpieza y alegría³³.

Por tanto, como bien señala Rosario Sánchez López, la formación dirigida a la mujer debía incidir en tres ámbitos: el ideológico, el religioso y el doméstico³⁴. Ahora bien, una trayectoria tan prolongada no pudo ser impermeable a los cambios que se fueron produciendo en el contexto internacional y específicamente

³¹ T.M. Ortega López, *Conservadurismo, catolicismo y antifeminismo: la mujer en los discursos del autoritarismo y el fascismo (1914-1936)*, «Ayer», n. 71, 2008, pp. 53-83; K. Richmond, *Las mujeres en el fascismo español. La Sección Femenina de la Falange, 1934-1959*, Madrid, Alianza Editorial, 2004.

³² J.C. Manrique, V.M. López, L.M. Torrego, R. Mongas, *La labor formativa desarrollada por la Sección Femenina de la Falange en la preparación de sus mandos e instructoras durante el período franquista*, «Historia de la Educación», n. 27, 2008, pp. 347-365.

³³ Palabras que prologan, junto con otras de Franco y de José Antonio Primo de Rivera, la obra publicada por la Sección Femenina de F.E.T. y de las J.O.N.S., *La Sección Femenina. Historia y organización*, Madrid, 1952, p. 8.

³⁴ R. Sánchez López, *Entre la importancia y la irrelevancia. Sección Femenina: de la República a la Transición*, Murcia, Editora Regional Ensayo/Consejería de Educación y Cultura, 2007, p. 19.

en España, a pesar de las resistencias que solía oponer el régimen de Franco. En su última etapa, la Sección Femenina fue introduciendo algunas novedades en sus planteamientos sobre el papel de la mujer española, con la intención de favorecer su mayor integración social y laboral en la vida del país. Sus programas formativos, en consecuencia, fueron variando a fin de facilitar la incorporación de la mujer al trabajo y a otros espacios sociales. Todo lo cual acarrearía tangencialmente algunas contradicciones³⁵, acaso inesperadas y menos aún deseadas, entre el arquetipo, que oficialmente seguía enarbolando el franquismo, de una mujer esposa y madre, católica ferviente, dócil y sacrificada, y otro modelo emergente de mujer con aspiraciones propias y apetencia de una cierta emancipación del entorno familiar.

3. *Instituciones y programas educativos de la sección femenina*

En solitario o normalmente en colaboración con otros organismos e instancias nacionales, provinciales o locales, la Sección Femenina tejó, a lo largo de los años, una compleja y densa red de iniciativas formativas, mayoritariamente en lo que suele conocerse como ámbito no formal de la educación. La Delegación Nacional de la organización femenina recogió en un documento el repertorio completo de instituciones propias, agrupándolas en siete categorías³⁶: Escuelas de Formación de Mandos; Escuelas de Formación y Capacitación del Profesorado; Escuelas de Formación de Economía Familiar Rural; Centros Docentes y Formativos; Colegios Mayores, Menores y Residencias; Instituciones Formativas, Culturales y Recreativas; y Servicios e Instituciones de Ayuda a la Familia y a la Mujer Rural y Trabajadora. No vamos a profundizar en el contenido de todas y cada una de estas categorías institucionales, tan sólo ofrecer una breve reseña de cada una, para finalmente concentrar toda nuestra atención en la última de ellas, y particularmente en uno de sus programas estrella: Las Cátedras Ambulantes.

Las Escuelas de Formación de Mandos se ocuparon de nutrir de dirigentes a la organización. En ellas, normalmente en régimen de internado, se combinaba la formación religiosa y política con el adiestramiento específico para las tareas que fuera a llevar a cabo una determinada dirigente. Así, por ejemplo, la Escuela Superior, enclavada en el Castillo de la Mota, formaba a los altos mandos de la Sección Femenina. Otras Escuelas dirigían sus programas a mandos intermedios

³⁵ V. Lorée Enders, *Problematic Portraits: the Ambiguous Historical Role of the Sección Femenina of the Falange*, in V. Lorée Enders, P. Beth Radcliff (edd.), *Constructing Spanish womanhood: female identity in modern Spain*, Albany, New York, State University Press of New York, 1999, pp. 375-398.

³⁶ A.N.A., Documento n. 4, *Instituciones y centros de la Delegación Nacional de la Sección Femenina*, folios 1-6.

y locales, o a dirigentes de las secciones juveniles. Vale la pena recordar que, entre sus actividades formativas, estaba la de preparar a futuras profesoras de formación cívico-social y política, y de enseñanzas del hogar y educación física, materias que durante décadas estuvieron bajo la responsabilidad de la Falange y la Sección Femenina en las instituciones escolares españolas, sobre todo de enseñanza secundaria y superior (notoriamente en las instituciones de formación de maestros). Otras Escuelas promovían cursillos de duración variable sobre temáticas específicas. Las Escuelas de Formación y Capacitación del Profesorado eran precisamente las que se dedicaban a preparar a las futuras profesoras de esas materias: Educación Física y Economía Doméstica o Enseñanzas del Hogar.

Además de este tipo de Escuelas, la Sección Femenina creó, a partir de los años '50, otras con el objetivo de extender sus programas formativos a toda la sociedad, acogiéndose a veces al reconocimiento oficial por parte del Ministerio de Educación o de Agricultura. Es el caso de las Escuelas Superiores de Economía Familiar Rural, con el fin de preparar a un grupo de instructoras que se dedicaran a la formación y promoción de la mujer campesina. También establecieron Escuelas de Asistentes Sociales, de Ayudantes Técnicos Sanitarios (Enfermeras), de Puericultoras, de Formación Profesional, con diversas ramas de especialización, reconocidas por el Ministerio de Educación, Talleres de Artesanía³⁷ y Escuelas de Capacitación Agraria, con el objetivo de mejorar el nivel de vida de las familias campesinas mediante programas de Enseñanza Doméstico-rural y Profesional-agrícola, en colaboración con el Ministerio de Agricultura. Con el tiempo se implantaron 'escuelas' de este tipo en muchas provincias españolas de norte a sur.

La Sección Femenina, como lo venía haciendo también la Falange, impulsó, además de estos centros no reglados con fines profesionalizadores, centros educativos convencionales dedicados a la educación formal, que obtuvieron asimismo el reconocimiento oficial de las autoridades de la administración educativa. Por supuesto, además de ofrecer el currículum oficial, impartían algunos programas propios de carácter complementario. La Sección Femenina dispuso de su propia Escuela de Magisterio, que llevó el nombre de Isabel La Católica, varios colegios de bachillerato y de educación primaria³⁸, escuelas-hogar en zonas rurales con población dispersa, incluso en el Sahara Occidental, que era en esos tiempos colonia española, y otros centros específicos, uno de Educación Especial, un Instituto de Música y Danza, y decenas de Escuelas de Hogar, en las que las mujeres cumplían su servicio social o recibían cursillos especializados en cuestiones domésticas.

³⁷ A.N.A., Documento n. 4, folio 3 y en Suárez Fernández, *Crónica de la Sección Femenina y su tiempo*, cit., p. 496.

³⁸ Suárez Fernández, *Crónica de la Sección Femenina y su tiempo*, cit., pp. 497 y 498.

La Sección Femenina, a imagen asimismo de lo que hacía también la Falange, creó y dirigió en capitales de provincia un buen número de alojamientos para estudiantes: un Colegio Mayor y varias Residencias para estudiantes universitarias, y una veintena de Colegios Menores, para niñas de enseñanza media o formación profesional que no podían continuar sus estudios en los pueblos donde residían. En estos internados se ofrecía a las internas además una serie de actividades recreativas y culturales, en un ambiente ostensiblemente marcado por reglas, preceptos ideológicos, lenguaje y simbología ostensible de la Sección Femenina, la Falange y el régimen franquista.

En el campo de la extensión cultural, el deporte y el ocio, la Sección Femenina desarrolló una variada gama de iniciativas más o menos formativas, con destinatarios diversos. En el caso de los llamados «círculos culturales», a los que podía acudir cualquier mujer, se promovían conciertos, obras de teatro, proyecciones, conferencias, exposiciones, principalmente abiertos a los jóvenes valores para que pudieran dar a conocer sus creaciones³⁹. En los «círculos de juventudes», se complementaba la formación escolar de las niñas con actividades culturales, recreativas y deportivas durante su tiempo libre. Los Albergues y Campamentos Juveniles recibían a niñas y adolescentes durante los periodos vacacionales. Y, por su parte, los llamados «Centros de Vacaciones» de la Sección Femenina hospedaban solamente a miembros de la organización y a veces a sus familiares, normalmente para estancias veraniegas a precios muy económicos. También la Sección Femenina administró instalaciones deportivas, que solía ceder a colegios u otras asociaciones y grupos de la localidad donde se enclavaban.

Por último, cabe citar un conjunto de servicios e instituciones dedicados a la familia, a la mujer rural y a las trabajadoras de baja cualificación: Hogares Rurales, Guarderías Infantiles, Centros Sociales, Residencias, Comedores Sociales y Cátedras, a las que prestaremos atención exclusiva a partir de ahora.

Como se puede vislumbrar en esta apresurada relación de instituciones, programas y actividades, la Sección Femenina fue diversificando y agrandando su campo de acción, convirtiéndose en una poderosa e influyente organización, probablemente la organización formativa por excelencia del régimen franquista en el campo de la educación no formal. En total, unas 1200 instituciones y programas. Una parte de ellos (por ejemplo, las Escuelas de Formación de Mandos y las Escuelas de Formación y Capacitación del Profesorado) tuvo como destinataria a la propia Sección Femenina, a fin de dotarla de cuadros y afiliadas bien aleccionadas, que garantizaran su reproducción institucional y desarrollaran eficazmente las tareas que el Estado le había encomendado. Otra parte se dedicó a programas que aseguraban su presencia e influencia social, al tener que ser cursados obligatoriamente por las mujeres, como es el caso la

³⁹ A.N.A., Documento n. 4, folio 5 y en Suárez Fernández, *Crónica de la Sección Femenina y su tiempo*, cit., pp. 506 y 507.

formación enmarcada con el Servicio Social que toda mujer debía cumplir, y los Cursos para la obtención del Título de Instructora Elemental de Hogar y Juventudes, obligatorio para las estudiantes de Magisterio. Y, por último, un tercer y variopinto grupo de programas, de seguimiento voluntario, en los que podían converger actividades con finalidad asistencial y otras más propiamente educativas. Las «Cátedras, fijas o ambulantes, son uno entre otros muchos ejemplos posibles de este género de programas.

4. *La educación viaja a los pueblos: origen y desarrollo de las «Cátedras Ambulantes» de la Sección Femenina*

La Sección Femenina se valió de un término, «Cátedra», de tan evidentes resonancias académicas, para denominar algunas de sus instituciones formativas. Crearon cinco cátedras de Educación Permanente de Adultos, siete cátedras «José Antonio» en poblados de absorción, en los que se realojaba a vecinos que procedían de asentamientos de infraviviendas, dos cátedras ambulantes nacionales y más de ochenta provinciales para la promoción de la mujer rural, repartidas por toda la geografía española peninsular, insular y colonial.

La primera Cátedra Ambulante de la Sección Femenina de la Falange Española nace poco después de finalizar la Guerra Civil, a mediados de los años '40, en un contexto de dictadura militar, persecución y represión política, aislamiento internacional y autarquía económica⁴⁰. La pobreza se extiende por todo el país y castiga severamente a las clases populares y particularmente a los habitantes de las zonas rurales. Finalizada la II Guerra Mundial, en un marco geopolítico hostil, la dictadura se impone un objetivo central, salir de esta situación económica caótica. Para alcanzarlo era necesario mejorar la productividad nacional y, por ende, recuperar las relaciones con el exterior, lo que planteaba no pocas paradojas⁴¹: por un lado, era necesario favorecer la emigración desde el campo a áreas urbanas del interior o de países europeos; por otro, había que evitar la despoblación del campo y activar el desarrollo de la población rural, y en concreto de la mujer⁴². En estas circunstancias, surge en 1946⁴³ la primera Cátedra Nacional motorizada, compuesta por cuatro

⁴⁰ Balletbó, *La mujer bajo la dictadura*, cit., p. 99.

⁴¹ S. Ramos Zamora, T. Rabazas, *Mujeres e instrucción rural en el desarrollismo español*, «Historia de la Educación», vol. 26, 2007, pp. 221-256.

⁴² Real Academia de la Historia de Madrid (R.A.H.), Fondos de la Sección Femenina, legado de Pilar Primo de Rivera, Carpeta Azul n. 155, Documento n. 2: *Promoción Profesional de la mujer en los medios rurales y suburbanos. Cátedras Ambulantes*, folio 1. Este mismo Documento también se encuentra en la Carpeta Roja n. 1.099.

⁴³ No hay una coincidencia absoluta sobre el año en que se creó la primera Cátedra Ambulante. De hecho:

a) aparece la creación adelantada a 1944 en: P. Primo de Rivera, *Recuerdos de una vida*,

camiones y cuatro remolques donados por el propio General Franco, lo que da una idea de su interés personal por este proyecto⁴⁴.

Esta primera Cátedra Nacional desarrollaría sus actividades básicamente en pueblos y aldeas de las provincias cercanas a Madrid⁴⁵, aunque también se adentró en la Sierra pobre de Madrid, principalmente con un programa de salud⁴⁶. En el verano de 1953, la Cátedra extendió su radio de acción a Orihuela (Alicante), al este de la península, para promover la explotación de la sericultura, donde recibió la visita del mismísimo Franco. Era, en todo caso, evidente la insuficiencia de una sola Cátedra, así que en 1954 se puso en marcha la segunda Cátedra Nacional⁴⁷, a la que se sumaron ese mismo año cuatro Cátedras más, dos patrocinadas por el Ministerio de Gobernación y otras dos por el Ministerio de Educación Nacional⁴⁸.

Por aquel entonces, y dado el éxito que cosechaban las Cátedras, fueron apareciendo equipos provinciales, a petición de las correspondientes Jefaturas Provinciales del Movimiento⁴⁹. Se crean así algunas Cátedras provinciales⁵⁰, que enseguida lograron buenos resultados en distintos puntos del país, como Monforte de Lemos en 1955, donde un equipo de seis profesoras de la Sección Femenina, al que se agregaron un profesor de religión y un médico, organizaron con éxito el sistema de enseñanza propio de las Cátedras⁵¹. El hecho es que, entre 1954 y 1956, ya había Cátedras Ambulantes en casi todas las provincias españolas. En 1958, completarían su presencia en todo el país, excepto en las

Madrid, Ediciones Dyrsa, 1983, p. 224; F.J. Sánchez Llamas, *Las enseñanzas para la mujer en las Cátedras Ambulantes de la Sección Femenina de F.E.T. y de las J.O.N.S.*, in Id. (ed.), *IX Coloquio de Historia de la Educación. El currículum: historia de una mediación social y cultural*, Granada, Ediciones Osuna, 1996;

b) también adelantada, pero a 1945, en: R.A.H., Fondos de la Sección Femenina, Carpeta Azul n. 155, Documento n. 2, folio 1; *Cátedras de Sección Femenina. Programas*;

c) retrasada a 1948 se recoge en: E. Jiménez Losantos, *La mujer en el franquismo. Doctrina y acción de la Sección Femenina*, «Tiempo de Historia», vol. 7, n. 83, 1981, p. 12;

d) y sitúan su creación en 1946 los siguientes documentos y publicaciones: R.A.H., Fondos de la Sección Femenina, Carpeta Roja n. 1.022, Documento n. 21, folio 1; Carpeta Azul n. 170, Documento n. 4, folio 1; y Carpeta Roja n. 1.099, Documento n. 14, folio 1; Sección Femenina de F.E.T. y de las J.O.N.S., *Cátedras de Sección Femenina. Organización*, Madrid, 1965, p. 4; Delegación Nacional de la Sección Femenina, *Cátedras Ambulantes*, Madrid, Editorial Almena, 1970, p. 4; Suárez Fernández, *Crónica de la Sección Femenina y su tiempo*, cit., p. 191; Agulló Díaz, *La educación de la mujer durante el franquismo y su evolución en Valencia (1951-1970)*, cit., p. 515.

⁴⁴ R.A.H., Fondos de la Sección Femenina, legado de Pilar Primo de Rivera, Carpeta Roja n. 1.022, Documento n. 21, folio 1.

⁴⁵ Delegación Nacional de la Sección Femenina, *Cátedras Ambulantes*, cit., p. 4.

⁴⁶ Suárez Fernández, *Crónica de la Sección Femenina y su tiempo*, cit., p. 290.

⁴⁷ Delegación Nacional de la Sección Femenina, *Cátedras Ambulantes*, cit., p. 5.

⁴⁸ Suárez Fernández, *Crónica de la Sección Femenina y su tiempo*, cit., p. 290.

⁴⁹ R.A.H., Fondos de la Sección Femenina, legado de Pilar Primo de Rivera, Carpeta Roja n. 1.022, Documento n. 21, folio 2.

⁵⁰ Delegación Nacional de la Sección Femenina, *Cátedras Ambulantes*, cit., p. 5.

⁵¹ Suárez Fernández, *Crónica de la Sección Femenina y su tiempo*, cit., pp. 290-291.

colonias africanas⁵², donde llegarían en 1965 (en concreto, a Río Muni, en la Guinea Ecuatorial)⁵³. A fines de 1968 funcionaban 72 Cátedras Ambulantes con un total de 360 profesoras, numerosos vehículos motorizados, incluyendo coche-vivienda en 59 de ellas y coche-clínica en unas 30⁵⁴.

En 1975 murió el General Franco y se inició, casi a renglón seguido, un proceso de transición política a la democracia en España. En 1977 cesaría la actividad de las Cátedras Ambulantes, más de ochenta en ese momento. Pilar Primo de Rivera, que aún seguía siendo la Delegada Nacional de la Sección Femenina, escribió esta especie de epitafio:

Las cátedras existieron mientras existió la Sección Femenina, hoy disuelta, porque, como decía José Antonio: el hombre es el sistema, y, eliminado el hombre, como en este caso, han dejado de funcionar, o al menos de llevar ilusión y alegría a unos pueblos que confiaban en la Falange y ahora se han quedado huérfanos⁵⁵.

Los deseos de la Sección Femenina de continuar su labor formativa fueron desoídos, Sin embargo, muchas de sus profesoras se integraron en otras instituciones que, como los Centros Móviles de Promoción Cultural, tomaron, hasta cierto punto y de manera temporal, el relevo de las Cátedras Ambulantes.

5. La educación como misión redentora: preceptos ideológicos y acciones formativas de las Cátedras Ambulantes

En períodos de cambios políticos drásticos, fruto de procesos revolucionarios o conflictos bélicos, o de ambas circunstancias a la vez, la educación extrema su condición de arma política⁵⁶, y adopta los objetivos y las formas de una misión histórica, doctrinal y salvadora⁵⁷. Y la pedagogía se transforma en un instrumento para la redención de los pueblos⁵⁸.

Como hemos adelantado, las Cátedras de la Sección Femenina tuvieron un precedente, las Misiones Pedagógicas, que nacieron a comienzos del siglo

⁵² Sección Femenina de F.E.T. y de las J.O.N., *Cátedras de Sección Femenina. Organización*, cit., p. 4.

⁵³ *Ibid.*

⁵⁴ Delegación Nacional de la Sección Femenina, *Cátedras Ambulantes*, cit., p. 5.

⁵⁵ Primo de Rivera, *Recuerdos de una vida*, cit., p. 242.

⁵⁶ Puede encontrarse una buena recopilación comentada de fuentes sobre la educación y su papel político en el franquismo en: I. Palacio Lis, C. Ruiz Rodrigo, *Educational Historiography of the Franco Regime: Analysis and Critical Review*, «Paedagogica Historica», vol. 39, n. 3, 2003, pp. 340-360.

⁵⁷ C.P. Boyd, *Historia Patria. Política, historia e identidad nacional en España: 1875-1975*, Barcelona, Pomares-Corredor, 1999.

⁵⁸ T.S. Popkewitz, *Los discursos redentores de las ciencias de la educación*, Morón, Sevilla, Movimiento Cooperativo de la Escuela Popular (MCEP), 1998.

XX, pero que alcanzaron su mayor proyección pública durante el quinquenio republicano (1931-1936). Según Boza Puerta y Sánchez Herrador, el objetivo de las Misiones era:

acercar la cultura, la pedagogía moderna y la educación ciudadana a los pueblos y aldeas más olvidadas de España. Las Misiones Pedagógicas fueron concebidas para terminar con las desigualdades existentes entre el campo y la ciudad, pues la población rural, en su mayoría, vivía una situación de miseria material y educativa⁵⁹.

Por su parte, según se lee en distintos documentos de la Sección Femenina de la Falange, las Cátedras Ambulantes de la Sección Femenina tenían como fines generales:

llegar a los pueblos y aldeas con el fin de poner al alcance de sus habitantes enseñanzas y actividades encaminadas a conseguir un nuevo estímulo hacia una elevación de vida, tanto espiritual como cultural y social, y, de esta forma, una más consciente incorporación de la comunidad hacia su propio desarrollo, al mismo tiempo que una mayor integración de cada comunidad en la vida de la nación⁶⁰.

Y como objetivos inmediatos: «Elevar el nivel económico-social y cultural de la mujer rural»⁶¹, y «realizar una tarea de divulgación cultural y de enseñanzas prácticas aplicadas al medio rural»⁶².

Así pues, el enriquecimiento cultural y moral de la población rural era, sin duda, un objetivo en el que, sobre el papel, coincidían ambas instituciones, Misiones Pedagógicas y Cátedras Ambulantes, a pesar de su inmensa distancia ideológica. Ambas desempeñaron su labor en pueblos y aldeas apartados, pequeños y deprimidos cultural, social y económicamente⁶³, en los que entonces vivía, malvivía sería más acertado decir, una parte significativa de la población española⁶⁴. En el caso de las Misiones los destinatarios eran los habitantes de estos núcleos de población sin distinción de sexo o edad, mientras que las Cátedras de la Falange fijaron inicialmente su atención sólo en las mujeres, aunque posteriormente irían ampliando su radio de acción a los niños (a

⁵⁹ M. Boza Puerta, M. Sánchez Herrador, *Las bibliotecas en las Misiones Pedagógicas*, «Boletín de la Asociación Andaluza de Bibliotecarios», n. 74, marzo 2004, p. 43.

⁶⁰ Sección Femenina de F.E.T. y de las J.O.N.S., *Cátedras de Sección Femenina. Organización*, cit., p. 4.

⁶¹ R.A.H., Fondos de la Sección Femenina, legado de Pilar Primo de Rivera, Carpeta Azul n. 155, Documento n. 2, folio 1.

⁶² Delegación Nacional de la Sección Femenina, *La Sección Femenina. Síntesis de su organización*, Madrid, 1963, p. 12.

⁶³ C. Domínguez, *Semblanza educativa de Moguer: su patrimonio como objeto de las excursiones escolares durante la II República*, «Fuentepiña. Revista de las Artes y las Letras», 1998, p. 110.

⁶⁴ R.A.H., Fondos de la Sección Femenina, legado de Pilar Primo de Rivera, Carpeta Azul n. 155, Documento n. 0, *Informe sobre Cátedras Ambulantes* del Servicio de Cátedras fechado el 22 de diciembre de 1962.

través de los deportes, las danzas y canciones regionales...), y a los jóvenes y hombres adultos, sobre las más diversas materias agropecuarias o de otra índole: el curtido y aprovechamiento de pieles, las explotaciones de los animales domésticos, la técnica de elaboración de determinados productos, la mejora de las explotaciones familiares agropecuarias, la higiene, el cooperativismo, la formación humana y cultural en general...⁶⁵ De modo tal que, a comienzos de los años '50, las Cátedras disponían de programas dirigidos prácticamente a todos los habitantes de los pueblos donde desarrollaban su actividad.

Ahora bien, estos programas estaban diferenciados estrictamente según la edad, pero sobre todo según el sexo, de acuerdo con los principios nacional-católicos que la dictadura asumía, aireaba y prescribía⁶⁶. En esta cuestión, la disparidad entre las Misiones republicanas y las Cátedras falangistas era más que evidente⁶⁷. Durante la II República, como nos recuerda García Alonso, «el papel de la mujer en la vida pública había dado un paso de gigante. Por primera vez en la historia española las mujeres eran consideradas ciudadanas, se le había reconocido – no sin ásperas disputas – su derecho al voto y podían trabajar en cualquier empleo según su capacidad e inclinación⁶⁸».

Desde el punto de vista técnico, las Cátedras de la Sección Femenina planeaban y ejecutaban sus proyectos cuidadosamente. Para la selección de los lugares en los que estos se desarrollarían, se atenían a ciertos criterios, como la insistencia de los Alcaldes en solicitarlos, la frecuencia de actividades previas de las Cátedras en la comarca, y el aislamiento y abandono socio-cultural de los núcleos poblacionales⁶⁹. Una vez decidida la comarca o área geográfica de actuación de la Cátedra, se giraba una visita de reconocimiento a todos los pueblos. Con la información recabada, se cumplimentaba un *Cuestionario Informativo* de cada uno⁷⁰, y un documento de *Elaboración de Consecuencias*, en el que se exponían orientaciones para el trabajo de la Cátedra en esa zona. Las Cátedras desarrollaban, pues, un proceso de intervención educativa siguiendo una serie de etapas genéricas, que las representantes de la Sección Femenina enumeraron en un Congreso Internacional sobre Centros Sociales celebrado en 1962⁷¹: toma de contacto, realización del cuestionario informativo,

⁶⁵ Delegación Nacional de la Sección Femenina, *Cátedras Ambulantes*, cit., pp. 5-6.

⁶⁶ K. Bergès, *La nacionalización del cuerpo femenino al servicio de la construcción de la identidad nacional en las culturas políticas falangistas y franquistas*, «Mélanges de la Casa de Velásquez», vol. 42, n. 2, 2012, pp. 91-103.

⁶⁷ H.M. Pérez Moreno, *La Sección Femenina de Huelva. Misión, estructura e instituciones formativas*, Huelva, Editorial Hergués, 2008, p. 56.

⁶⁸ M. García Alonso, *Necesitamos un pueblo. Genealogía de las Misiones Pedagógicas*, «Catálogo de la Exposición de Val de Omar y las Misiones Pedagógicas», mayo-julio 2003, p. 79.

⁶⁹ H.M. Pérez Moreno, *Una escuela viajera. La Cátedra Ambulante de la Sección Femenina de Huelva (1956-1977)*, Huelva, Diputación Provincial de Huelva, 2004, pp. 51-52.

⁷⁰ Sección Femenina de F.E.T. y de las J.O.N.S., *Cátedras de Sección Femenina. Organización*, cit., pp. 16-17.

⁷¹ Estas fases se han extraído del Trabajo sobre Cátedras Ambulantes que realizó la Asistente Social de la organización femenina, Begoña Arnaiz, y que presentó en el citado Congreso (R.A.H.,

elaboración y fijación de objetivos, programación y realización del programa. Se trataba, pues, de un modelo escalonado, centralizado, de cariz ‘misionero’ o ‘colonizador’, corriente en la España de entonces, particularmente en las políticas agrarias.

Teniendo en cuenta las pautas habituales seguidas en la mayoría de las actuaciones, por lo general cursos de formación, pueden describirse con algo más de detalle las fases que estas solían seguir⁷²:

1. Elección del punto geográfico o destino de la actuación.
2. Diagnóstico o evaluación inicial del mismo (cuestionario informativo y entrevistas).
3. Tramitación documental (proyecto, calendario y presupuesto) y aprobación de la Delegación Nacional.
4. Organización del curso en la localidad (infraestructuras, personal docente y colaboradores de la localidad) y planificación del programa de actuación acorde con el diagnóstico.
5. Desarrollo del curso o aplicación del programa formativo y/o asistencial.
6. Balance o valoración del curso (memorias generales y específicas) y estrategias de seguimiento y evaluación de las Delegaciones Provinciales y de la Delegación Nacional.
7. Tramitación de documentación posterior (Memorias, Liquidaciones y Certificaciones de gastos).

Las Cátedras solían permanecer en los destinos entre un mes y más de tres meses⁷³. Sus actividades podían ocupar literalmente toda la jornada desde el lunes al sábado, según las recomendaciones de la Sección Femenina⁷⁴: de 9 a 13,15 horas para jóvenes solteras, de 15 a 19,30 horas para chicas y chicos jóvenes, y madres, y de 21 a 22,30 horas de nuevo para chicas jóvenes y también para toda la ciudadanía en general. Sin embargo, estos horarios eran flexibles y se adaptaban a la economía y estilo de vida local, principalmente a las tareas agrícolas de cada estación y a circunstancias concretas de la vida del pueblo⁷⁵. Las clases se impartían en lugares muy variopintos: aulas de las escuelas convencionales, salones parroquiales, centros sindicales, casas particulares cedidas o alquiladas por el Ayuntamiento, espacios deportivos, locales y salones de instituciones religiosas...⁷⁶

Fondos de la Sección Femenina, legado de Pilar Primo de Rivera, Carpeta Azul n. 155, Documento n. 1).

⁷² Pérez Moreno, *Una escuela viajera. La Cátedra Ambulante de la Sección Femenina de Huelva (1956-1977)*, cit., p. 47.

⁷³ *Ibid.*, pp. 162-163.

⁷⁴ Sección Femenina de F.E.T. y de las J.O.N.S., *Cátedras de Sección Femenina. Organización*, cit., p. 124.

⁷⁵ R.A.H., Fondos de la Sección Femenina, legado de Pilar Primo de Rivera, Carpeta Roja n. 1.099, Documento n. 14 *Informe sobre Cátedras Ambulantes* de julio de 1977, folio 7.

⁷⁶ Pérez Moreno, *Una escuela viajera. La Cátedra Ambulante de la Sección Femenina de Huelva (1956-1977)*, cit., p. 128.

Los Equipos de las Cátedras estar normalmente constituidos por seis profesoras: una Jefa de Cátedra, una Divulgadora Social, una Instructora Rural⁷⁷, una Instructora de Juventudes y dos Profesoras de Hogar, una de Corte y Confección y otra de Labores y Trabajos Manuales⁷⁸. Pero además, como colaboradores especiales o docentes invitados, podían, y en la mayoría de los casos ‘debían’, participar las autoridades locales y algunos profesionales: el Alcalde, que era además el Jefe Local del Movimiento, el Cura Párroco, el Secretario del Ayuntamiento, el Jefe de la Hermandad Sindical, el Médico, los Maestros, el Veterinario, la Delegada Local de la Sección Femenina, etc.⁷⁹

Las Cátedras desarrollaban primordialmente actividades formativas, pero también asistenciales. A través de las primeras, trataban de transmitir conocimientos y técnicas e inculcar valores sobre temáticas relacionadas con los más diversos campos: político, religioso, laboral, nutricional, higiénico, doméstico, folclórico⁸⁰, cultural y alfabetizador. En cuanto a las segundas, asistencial, los equipos de las Cátedras proporcionaban información, consejo y ayuda, sobre todo a las mujeres, en los ámbitos sanitario, social y laboral, religioso y moral, y educativo. Estos equipos desarrollaban también ciertas tareas de orientación de las maestras locales, recogían datos de la comunidad (folclore, costumbres, características económicas y sociales, morales y religiosas, escolares, etc.), y finalmente suministraban los medios para garantizar la continuidad de su labor una vez concluyeran su programa y abandonaran la comunidad. Salvando las distancias, cabría afirmar que este conjunto coordinado de acciones sociales y formativas se parece mucho a lo que hoy denominaríamos un programa de desarrollo comunitario, si bien, en el caso de la Sección Femenina, valiéndose de una organización vertical, muy jerárquica, en la que la participación de la población se reducía a la recepción de las informaciones y a la asistencia a los cursos y actos. En otras palabras, un modelo de educación bancaria, en términos de Paulo Freire. La intención explícita de las Cátedras no era precisamente ‘liberar a los oprimidos’, sino todo lo contrario: adoctrinarlos, persuadirlos e incorporarlos al nuevo orden político y social del franquismo.

Las Misiones republicanas habían potenciado la difusión cultural en las zonas rurales organizando lecturas y conferencias, sesiones cinematográficas⁸¹

⁷⁷ C. Real Apolo, *Las Instructoras Diplomadas Rurales y la formación de la mujer en la provincia de Badajoz*, «Revista de Estudios Extremeños», vol. 69, n. 2, 2013, pp. 1327-1348.

⁷⁸ Delegación Nacional de la Sección Femenina, *Cátedras Ambulantes*, cit., p. 7.

⁷⁹ Sección Femenina de F.E.T. y de las J.O.N.S., *Cátedras de Sección Femenina. Organización*, cit., p. 27.

⁸⁰ C. Ortiz, *Folclore, tipismo y política. Los trajes regionales de la Sección Femenina de Falange*, «Gazeta de Antropología», vol. 28, n. 3, 2012.

⁸¹ A. Puyal, *Gonzalo Menéndez-Pidal o el cine como documento*, in Id. (ed.), *Las Misiones Pedagógicas 1931-1936*, Madrid, Sociedad Estatal de Conmemoraciones Culturales-Residencia de Estudiantes, 2006, p. 391.

y musicales, audiciones de radio y discos, exposiciones de arte⁸², y creando pequeñas bibliotecas populares⁸³, en las que pusieron un especial afán⁸⁴. La biblioteca era, en realidad, lo único que quedaba en el pueblo tras el paso de la Misión y su razón de ser era, más que escolar, social: el fomento de la lectura de toda la población como medio para el desarrollo democrático. En el caso de las Cátedras Ambulantes, la biblioteca era también itinerante, así que desaparecía del pueblo cuando la Cátedra finalizaba su estancia, aunque también es cierto que, antes de marcharse, los responsables de la Cátedra se preocupaban de que alguna entidad local solicitara al Ministerio de Educación la instalación de una Biblioteca de Iniciación Cultural. La Cátedras promovían, más que nada, actividades formativas y de divulgación cultural, a través de clases de alfabetización, de promoción de los bailes y las canciones regionales⁸⁵, actividades musicales, teatro leído y guiñol, proyecciones de cine, charlas sobre temas relevantes del pueblo, noticias de actualidad, sobre agricultura o cualquier otra temática sugerida por la población⁸⁶.

Las escuelas nacionales constituyeron, como ya se apuntó, otro de los objetivos de intervención de las Cátedras. En ellas incluso llevaron a cabo tareas de inspección, algo que el régimen permitía también cura párroco y a las autoridades eclesiásticas en general, como agentes para el control ideológico, moral y religioso de la educación pública. Pero además las Cátedras se apoyaron en los maestros y las maestras rurales⁸⁷, con la intención de que se convirtieran en los continuadores de su programa, tras su paso por la localidad. Una de las profesoras del equipo, la instructora de juventudes, cuyo rol era señaladamente doctrinario, asesoraba a las maestras en la enseñanza de ciertas materias⁸⁸, como la formación cívica y política, y la educación física⁸⁹, terrenos curriculares de la educación primaria y secundaria en los que la Falange, como ya se apuntó, ejerció un control casi absoluto durante toda la dictadura franquista.

No olvidaron las Cátedras su capital función como instrumentos de transmisión ideológica y educación política de los habitantes del campo.

⁸² F. Canes Garrido, *Las misiones pedagógicas: educación y tiempo libre en la Segunda República*, «Revista Complutense de Educación», vol. 4, n. 1, 1993, pp. 147-168, en partic. p. 150.

⁸³ Boza Puerta, Sánchez Herrador, *Las bibliotecas en las Misiones Pedagógicas*, cit., p. 44.

⁸⁴ L. Orera Orera, *María Moliner. Sus aportaciones a la política bibliotecaria de la Segunda República*, «Boletín de la Asociación Andaluza de Bibliotecarios», n. 62, marzo, 2001, p. 50.

⁸⁵ M.A. Lizarazu, *En torno al folklóre musical y su utilización. El caso de las Misiones Pedagógicas y la Sección Femenina*, «Anuario Musical», n. 51, 1996, pp. 233-245.

⁸⁶ R.A.H., Fondos de la Sección Femenina, legado de Pilar Primo de Rivera, Carpeta Azul n. 170, Documento n. 4 *Cátedras Ambulantes Francisco Franco*, folios 2 y 3.

⁸⁷ Sección Femenina de F.E.T. y de las J.O.N.S., *Cátedras de Sección Femenina. Organización*, cit., p. 9.

⁸⁸ *Ibid.*, pp. 38, 85 y 86.

⁸⁹ R.A.H., Fondos de la Sección Femenina, legado de Pilar Primo de Rivera, Carpeta Azul n. 155, Circular n. 73 *Tarea de las Cátedras en lo que se refiere al Servicio de Juventudes*, de 13 de noviembre de 1961.

Impartían clases y organizaban conferencias de formación político-social, en las que se «estudiaban»⁹⁰ cuestiones como las unidades «naturales» de convivencia (familia, municipio y sindicato), la superación del capitalismo y del marxismo por el nacional-sindicalismo, tópicos clásicos del falangismo, los principios católicos, los organismos municipales y provinciales y sus servicios administrativos o de otra índole, los valores artísticos y naturales de la provincia, y la propia Sección Femenina. Obviamente, las Misiones republicanas y las Cátedras falangistas partían de supuestos ideológicos radicalmente distintos y, en consecuencia, los contenidos de sus respectivos programas de formación política eran contrapuestos. Las Misiones se ocuparon de la propagación de los valores democráticos, de los derechos, deberes y libertades de un estado laico, mientras que las Cátedras fueron una vía de adoctrinamiento político-religioso y control social, en un estado totalitario, autocrático y confesional, si bien reflejarían con el paso del tiempo el *aggiornamento* que, quizás inevitablemente, iría experimentado ese estado, sobre todo a partir de los programas de desarrollo económico de los años '60.

6. Consideraciones finales

Las Cátedras Ambulantes fueron un instrumento político del régimen franquista⁹¹ y, en consecuencia, una de sus metas era crear prosélitos, es decir, potenciar la presencia de la Sección Femenina en las áreas rurales, captando nuevas afiliadas para la organización, y seleccionado entre ellas a algunas jóvenes para que, tras ser sometidas a un proceso formativo específico, personificaran, literalmente en un sentido biopolítico, el espíritu del régimen, y desempeñaran en el futuro funciones de responsabilidad en la organización. De igual modo, debían promover, instituir y gestionar en los pueblos centros formativos y culturales, crear o revitalizar la delegación local de la Falange, poner en marcha instituciones educativas y sociales para jóvenes y adultos (Escuelas Mixtas de Formación-Hogar, Pequeñas Universidades, Teleclubs, Hogares Juveniles...). Todo indica que estas múltiples iniciativas de las Cátedras no lograron el éxito previsto, a tenor de las memorias anuales de la Delegación Nacional de la Sección Femenina, y que su trabajo más eficaz se desarrolló en el ámbito de la formación de la mujer y la asistencia social.

⁹⁰ Sección Femenina de F.E.T. y de las J.O.N.S., *Cátedras de Sección Femenina. Programas*, Madrid, 1965, pp. 11-16.

⁹¹ M.F. Rincón García, *Mujeres azules de la Sección Femenina: formación, libros y bibliotecas para el adoctrinamiento político en España (1939-1945)*, «Métodos de Información (Internet)», vol. 1, n. 1, 2010, pp. 59-81.

La Sección Femenina precedió y sobrevivió, aunque por poco tiempo, al régimen franquista. Sus Cátedras Ambulantes, a lo largo de sus tres décadas de existencia, lo acompañaron de principio a fin, reflejaron su evolución y también sus contradicciones. Aunque su misión no fue en absoluto promover la autonomía y la igualdad de la mujer, sino todo lo contrario, se convirtieron *de facto* en una vía o, si se quiere, en una oportunidad para que las mujeres de las aldeas y los pueblos más recónditos salieran de sus hogares y adquirieran algunos aprendizajes, normalmente relacionados con su rol exclusivamente doméstico y maternal, pero también de carácter profesional. En algunos casos, esa oportunidad se pudo convertir, inadvertidamente, en un estímulo para continuar una formación incipiente y tal vez vislumbrar otra forma de vida, aunque siguieran sumidas en el deprimente ambiente moral del franquismo y sometidas a un asfixiante corsé que discriminaba social y jurídicamente a la mujer. Este fenómeno no fue insólito. Instituciones educativas como las Universidades Laborales, creadas en 1955 para que niños y adolescentes de clase trabajadora cursaran con becas sus estudios y al mismo tiempo crecieran respirando los principios socio-políticos del falangismo, acabaron convirtiéndose en una vía de promoción personal y profesional de muchos de ellos⁹². Y las pretensiones doctrinarias de su primera etapa histórica se verían progresivamente atenuadas, cuando no contestadas por sus destinatarios, y a la postre desactivadas.

Los procesos políticos totalitarios, cuando se vuelven duraderos, no pueden ser completamente inmunes ni a los cambios de su entorno, ni a los que se producen en su seno. Esta pauta es variable en ritmo, forma e intensidad, según el modelo político. En el caso del franquismo, una dictadura militar ideológicamente débil y acomodaticia, la influencia relativa de los distintos grupos sociales, económicos e ideológicos involucrados fue alterándose, en función de la voluntad del General Franco y las adaptaciones pragmáticas de su régimen a las circunstancias históricas. El ascenso de sectores católicos conservadores desde mitad de los años '50 se produjo, por ejemplo, en detrimento de la Falange y de sus organizaciones satélites, como la Sección Femenina⁹³. Sin embargo, esta institución, quizás por el plano secundario en el que se situó desde un principio, siguió gozando del favor del régimen hasta que este llegó a su fin. Lógicamente, su papel 'redentor' de las mujeres de la España rural, fue volviéndose cada vez más añejo, pintoresco, desdibujado y ambiguo, conforme fueron extendiéndose, incluso a las zonas rurales, los cambios sociales y culturales, con nuevos valores y estilos de vida, principalmente entre las nuevas generaciones.

⁹² P. Delgado, G. Ramírez, *Labour Universities: physical education and the indoctrination of the working class*, «History of Education: Journal of the History of Education Society», vol. 43, n. 1, 2014, pp. 87-104.

⁹³ M. Moreno, *Mujeres en la Acción Católica y el Opus Dei. Identidades e género y culturas políticas en el catolicismo de los años sesenta*, «Historia y Política. Ideas, Procesos y Movimientos Sociales», n. 28, 2012, pp. 167-194.

La ginnastica nelle scuole primarie milanesi nel primo decennio postunitario

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Gymnastics education in primary schools in Milan in the first decade of post-unification

ABSTRACT: This essay reconstructs the series of events that led to introduction of gymnastics in Milan single-sex primary schools immediately after Unification – that is, before the De Sanctis Law of 1878 made it compulsory – reflecting the local traditions pre-Unification and interest in the teachings of R. Obermann in Turin. The research takes advantage of contemporary printed and archival sources, such as City Council minutes and agendas, statements by key players, articles extracted from eminent education journals, for example «Patria e Famiglia» and «L'Educatore Italiano». It shows the consideration given by the City of Milan of gymnastics as an educational tool at a time when most City Councils were experiencing difficulties and delegated the responsibility of such instruction to gymnastic clubs. As this research suggests, throughout the 1860s, not only did the City Council of Milan introduce the practice of physical exercise in primary schools, it also encouraged training of teachers, sending them to dedicated government-organized courses in Turin. Moreover, in order to create adequate practice spaces, the City Council of Milan established a public gymnasium that soon became a meeting place for gymnasts and an endorsement of gymnastics in contemporary society. By teaching gymnastics, which had a strong military connotation, the City Council of Milan complemented its primary school teaching programs, promoting the physical and moral regeneration of its citizens so as to prepare younger generations to face their civic duties – especially the males, who had to become the soldiers of the newly born nation.

EET/TEE KEYWORDS: History of Education; Gymnastic; Civics; Primary Education; Italy; XIX Century.

Premessa

Nel corso della seduta del Consiglio comunale di Milano del 4 maggio 1860, l'assessore Giovanni Visconti Venosta illustrava gli obiettivi che la nuova

amministrazione alla guida della città dopo la liberazione dall'Austria intendeva perseguire in ambito educativo-scolastico. Il discorso pronunciato dall'assessore manifestava tutto l'interesse della classe dirigente cittadina, espressione del moderatismo lombardo¹, per l'istruzione, chiamata a assolvere non solo una funzione strumentale (alfabetizzare la popolazione) ma anche culturale, morale e politica. Si trattava di fare della scuola il luogo per l'integrazione di tutti i ceti, in specie quelli più deboli, nella nuova nazione; essa doveva altresì dare lustro alla città nel Regno che stava per nascere². Di qui la messa in luce degli elementi di criticità del sistema scolastico promosso dall'Impero asburgico, definito dall'assessore un «vecchio edificio crollante»³.

Epurate dalle ostilità nei confronti della dominazione austriaca, le parole di Visconti Venosta evidenziavano alcune difficoltà innegabili, sia pure in un contesto di indubbia positività rispetto a altre situazioni regionali: la Lombardia ereditava dalle riforme asburgiche precedenti e successive alla Restaurazione una scuola primaria diffusa su tutto il territorio, obbligatoria sia per i bambini che per le bambine, regolata da norme certe e precise in merito alla formazione e al reclutamento degli insegnanti, che nel tempo avevano favorito la creazione, soprattutto nei centri urbani, di una classe docente ben preparata sotto il profilo professionale e culturale⁴. Le lacune rilevate da Visconti Venosta riguardavano

¹ Per il periodo considerato in questo contributo, furono sindaci di Milano Antonio Beretta (dal 1860 al 1867) e Giulio Belinzaghi (dal 1868 al 1884), entrambi espressione della consorzeria, ovvero il gruppo di politici aderenti al moderatismo che amministrò la città fra l'Unità e gli anni Novanta; in merito si vedano: F. Nasi, *1860-1899: da Beretta a Vigoni. Quarant'anni di amministrazione comunale*, «Città di Milano», vol. 85, maggio 1968, pp. 21-41; M. Sai, *L'attività del Consiglio comunale e della Giunta municipale di Milano dal 1861 al 1887*, in *Storia amministrativa delle Province lombarde*, III: *Il Comune di Milano*, Milano, Giuffrè, 1970, pp. 3-78; M. Punzo, *L'amministrazione della città*, in G. Rumi, A.C. Buratti, A. Cova (edd.), *Milano nell'Unità nazionale 1860-1898*, Milano, Cariplo, 1991, pp. 411-430; M. Meriggi, *Lo «Stato di Milano» nell'Italia unita: miti e strategie politiche di una società civile (1860-1945)*, in *Storia d'Italia. Le regioni dall'Unità a oggi. La Lombardia*, a cura di D. Bigazzi, M. Meriggi, Torino, Einaudi, 2001, pp. 5-49; E. Colombo, *Come si governava Milano. Politiche pubbliche nel secondo Ottocento*, Milano, Franco Angeli, 2005; Ead., *Una rete amicale di governo: la consorzeria nella Milano post-unitaria*, in *De Amicitia. Scritti dedicati a Arturo Colombo*, a cura di G. Angelini, M. Tesoro, Milano, Franco Angeli, 2007, pp. 460-470; Ead., *Il «Regno delle consorzierie»*, *Milano 1860-1892*, in Ead. (ed.), *I sindaci del Re 1859-1899*, Bologna, il Mulino, 2010, pp. 171-194; M. Soresina, *Materiali per una biografia collettiva delle élites milanesi (1860-1915)*, in Id., *La periferia al centro. Figure e momenti di storia lombarda tra '800 e '900*, Milano, Franco Angeli, 2009, pp. 35-76; più in generale, sugli orientamenti politici del moderatismo lombardo, cfr. N. Raponi, *Politica e amministrazione in Lombardia agli esordi dell'Unità. Il programma dei moderati*, Milano, Giuffrè, 1967.

² Si rinvia in merito ai primi due capitoli di C. Ghizzoni, *Scuola e lavoro a Milano fra Unità e fascismo. Le civiche Scuole serali e festive superiori (1861-1926)*, Lecce-Brescia, Pensa MultiMedia, 2014.

³ *Proposta per riordinamento della pubblica istruzione comunale. Commissione degli studi*, in *Atti del Municipio di Milano, annata 1860, seduta del 4 maggio 1860*, Milano, Pirola, [s.d.], p. 63.

⁴ In proposito si vedano: *Problemi scolastici ed educativi nella Lombardia del primo Ottocento*, I: *L'istruzione elementare*, Milano, SugarCo, 1977; X. Toscani, *Scuole e alfabetismo nello stato di*

essenzialmente questi aspetti: la scarsa frequenza in città delle scuole primarie comunali, in rapporto all'istruzione privata; lo stato fortemente problematico dell'edilizia scolastica carente dal punto di vista quantitativo (molti erano i locali in affitto) e anche qualitativo; un meccanismo di reclutamento dei maestri che premiava gli anni di servizio svolti nella scuola pubblica e che costringeva gli insegnanti a una carriera lenta, fatta di supplenze e di precarietà.

A suo giudizio occorre che l'azione del Comune mirasse non solo all'applicazione della nuova normativa nazionale, ma tenesse conto anche degli specifici bisogni della città e di alcune priorità individuate dall'amministrazione. Merita rilevare che se forti erano le critiche al precedente governo, riserve erano altresì espresse dagli amministratori milanesi nei confronti della Legge Casati⁵. La legislazione piemontese era contestata per l'assetto dato all'istruzione secondaria in specie tecnica, che trasmetteva una cultura troppo generica e sicuramente non in grado di formare la futura classe dirigente destinata a guidare la crescita del Paese; per il silenzio sull'istruzione secondaria femminile e per alcuni limiti relativi al trattamento giuridico e economico dei maestri. Di qui la decisione, nel corso della seduta del Consiglio comunale già ricordata, di affiancare all'assessore una Commissione per gli studi, formata da alcuni illustri esponenti della classe politica e culturale non solo cittadina, ma anche nazionale. Figuravano⁶, infatti, insieme agli assessori Giovanni Visconti Venosta e Carlo

Milano da Carlo Borromeo alla Rivoluzione, Brescia, La Scuola, 1993; Id., *La politica scolastica nel Regno Lombardo-Veneto (scuole elementari)*, in L. Pazzaglia (ed.), *Chiesa e prospettive educative in Italia tra Restaurazione e Unificazione*, Brescia, La Scuola, 1994, pp. 317-353; A. Bianchi (ed.), *L'istruzione in Italia tra Sette e Ottocento. Lombardia, Veneto, Umbria*, 2 voll., Brescia, La Scuola, 2007 (in partic. il I Vol.); S. Polenghi, *La formazione dei maestri nella Lombardia austriaca*, in Ead. (ed.), *La scuola degli Asburgo. Pedagogia e formazione degli insegnanti tra il Danubio e il Po (1773-1918)*, Torino, Sei, 2012, pp. 45-89; Ead., *Elementary school teachers in Milan during the Restoration (1814-1859): innovations and improvements in teacher training*, «History of Education & Children's Literature», vol. VIII, n. 1, 2013, pp. 147-166.

⁵ Si vedano le contestazioni alla legge scolastica del nuovo Stato unitario in: *Relazione della Commissione civica per gli studi sul riordinamento dell'istruzione comunale letta nella seduta del 6 maggio 1861 del Consiglio municipale*, [Milano], Pirola, s.d. Più in generale per le critiche mosse dai lombardi al testo della Casati, cfr. M.C. Morandini, *Scuola e nazione. Maestri e istruzione popolare nella costruzione dello Stato unitario (1848-1861)*, Milano, Vita e Pensiero, 2003, pp. 331-340.

⁶ Cfr. *Relazione della Commissione civica per gli studi sul riordinamento dell'istruzione comunale letta nella seduta del 6 maggio 1861 del Consiglio municipale*, cit., pp. 3-4. La Commissione fu così composta fino al 1868, allorché venne rinnovata. Tale organismo continuò a operare fino al 1904: cfr. C.A. Mor, *L'istruzione elementare pubblica in Milano. Cenni storici e statistici*, Milano, Casa Editrice Pallestrini, 1906, pp. 52-61.

Cagnola, poi sostituito da Paolo Belgioioso, Carlo Tenca⁷ e Giovanni Cantoni⁸, come consiglieri comunali, Cesare Correnti⁹, Luigi Rossari¹⁰ e Giuseppe Ambrosoli, cui presto subentrò Francesco Rodriguez, come esperti esterni¹¹.

A questo organismo la Giunta affidava il compito di riordinare la scuola milanese secondo il dettato della Legge Casati e di avviare, nel contempo, quelle riforme, che non erano richieste dalla normativa vigente, ma che erano ritenute necessarie per colmare le lacune della legislazione sabauda. Di qui il richiamo di Visconti Venosta a fare attenzione alla questione edilizia; alla creazione di istituzioni integrative della scuola governativa dedite all'alfabetizzazione e all'istruzione postelementare della gioventù maschile e femminile lavoratrice; all'istruzione secondaria femminile; alla formazione di una classe docente motivata e adeguatamente garantita sul piano giuridico, da immettere nelle elementari comunali; a una riforma della scuola primaria non circoscritta all'applicazione della legge, ma attenta agli aspetti educativi e metodologici.

In questa sollecitudine per l'impianto pedagogico delle scuole civiche, si iscrive anche l'interesse per la ginnastica, di cui Visconti Venosta suggeriva l'introduzione nelle elementari milanesi con una finalità ricreativa e educativa:

⁷ Tenca fu il relatore in Consiglio comunale dei rapporti stesi dalla Commissione. Sul letterato, giornalista e deputato milanese, si veda: T. Massarani, *Carlo Tenca e il pensiero civile del suo tempo*, Firenze, Le Monnier, 1907; nello specifico per il suo impegno in ambito educativo si rinvia a C. Mollica, *L'attività pedagogica di Carlo Tenca*, «Rivista Pedagogica», n. 2, 1932, pp. 274-299 e n. 3, pp. 424-453; e alla recente voce biobibliografica curata da C. Ghizzoni e S. Polenghi, in *Dizionario Biografico dell'Educazione 1800-2000*, 2 voll., Milano, Editrice Bibliografica, 2013 (d'ora in avanti cit.: DBE), Vol. II (L-Z), pp. 573-574.

⁸ Collaboratore de «Il Crepuscolo» di Tenca, Cantoni (1818-1897) fu protagonista delle vicende risorgimentali. Dopo la liberazione dall'Austria, rientrato dalla Svizzera, dove si era rifugiato nel 1849, fu docente di Fisica all'Università di Pavia di cui divenne anche rettore. Deputato nel 1869 e senatore nel 1879, fu chiamato da Correnti, di cui condivideva le posizioni politiche e culturali, al Ministero della Pubblica Istruzione come Segretario generale, allorché lo stesso Correnti era responsabile del dicastero. Su di lui si veda la voce curata da M. Gliozzi in *Dizionario biografico degli italiani*, Roma, Istituto della Enciclopedia Italiana, 1975 (d'ora in avanti cit.: DBI), Vol. XVIII, pp. 324-325.

⁹ Su Correnti si vedano almeno la voce biografica curata da L. Ambrosoli in DBI, Vol. XXIX (1983), pp. 476-480 e la recente scheda redatta da E. Mazzella in DBE, Vol. I (A-K), pp. 397-399.

¹⁰ Docente di lingua italiana e geografia presso la scuola normale e la scuola tecnica di Milano, durante il governo asburgico, amico fraterno di A. Manzoni, T. Grossi e C. Porta, Rossari (1797-1870) collaborò attivamente con il Comune ambrosiano nella riforma della scuola primaria, nel primo decennio postunitario: cfr. C. Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento. Il contributo di Maria Magnocavallo (1869-1956)*, Brescia, La Scuola, 2005, pp. 115-118; la voce curata da V. Chierichetti in DBE, Vol. II (L-Z), pp. 431-432; Ghizzoni, *Scuola e lavoro a Milano fra Unità e fascismo*, cit., *passim*.

¹¹ *Nomina della Commissione per gli studi*, in *Atti del Municipio di Milano, annata 1861, seduta del 4 luglio 1861*, Milano, Pirola, [s.d.], pp. 246-247. Rodriguez prese parte alla seconda Guerra di Indipendenza e trascorse in esilio, in Svizzera, il decennio dal 1850 al 1860. Collaborò con «Il Crepuscolo». Rientrato a Milano, fu chiamato a dirigere il Regio Istituto Tecnico, poi intitolato a Cattaneo: cfr. Massarani, *Carlo Tenca e il pensiero civile del suo tempo*, cit., p. 272; *Francesco Rodriguez. Preside dal 1861 al 1871*, estratto dall'«Annuario del R. Istituto Tecnico C. Cattaneo in Milano», anno scolastico 1927-1928, Serie II, n. 5.

«Nessun posto ebbero finora nelle nostre scuole gli esercizi ginnastici – egli affermava –, che, alternando le lunghe ore della scuola, riposano le menti, rinvigoriscono le gracili membra dei fanciulli e danno loro per tempo quelle abitudini del coraggio, che insegnano, nei bisogni della patria, ad essere uomini d'onore»¹². La Commissione civica raccolse il consiglio dato dall'assessore e, nel quadro dei diversi adempimenti compiuti per il riordino della scuola cittadina, si premurò di inserire, nel corso degli anni Sessanta, la ginnastica nelle primarie milanesi, affrontando non poche difficoltà, che documentano la lenta affermazione di questa disciplina nei costumi formativi del nostro paese¹³. A questa faticosa comparsa della ginnastica nella scuola elementare ambrosiana nel primo decennio postunitario (ovvero prima che la Legge De Sanctis del 1878 ne prevedesse l'obbligatorietà) tra attenzioni alla tradizione preunitaria milanese e deciso interesse per il magistero torinese di R. Obermann, è dedicato questo contributo. Sulla base delle discussioni in Consiglio comunale, delle testimonianze dei protagonisti, della pubblicistica edita dal Comune di Milano, degli articoli di alcune autorevoli testate pedagogiche milanesi, quali «Patria e Famiglia» e «L'Educatore Italiano»¹⁴, si cercherà di fare luce sui primi passi mossi dall'educazione ginnica negli istituti primari ambrosiani, fortemente voluta dalla amministrazione municipale fin dal 1861.

1. *Il dibattito sull'introduzione degli esercizi ginnici nelle elementari subito dopo l'Unità*

Nella relazione presentata al Consiglio comunale nella seduta del 6 maggio 1861, la Commissione per gli studi dimostrava di volere assecondare il suggerimento della Giunta in merito alla ginnastica inserendola nelle scuole primarie maschili e femminili. Essa motivava questa scelta pedagogica, non prevista, come è noto, dalla Legge Casati, con ragioni connesse con l'ordinamento e i fini propri della scuola elementare. Nel già citato discorso al Consiglio comunale, l'assessore Visconti Venosta aveva fatto notare che se la

¹² *Proposta pel riordinamento della pubblica istruzione comunale. Commissione degli studi*, cit., pp. 64-65.

¹³ In merito si vedano: M. Di Donato, *Storia dell'educazione fisica e sportiva. Indirizzi fondamentali*, Roma, Studium, 1984; G. Gori, *Educazione fisica, sport e giornalismo. Dall'unità d'Italia alla prima olimpiade dell'età moderna*, Pàtron, Bologna, 1989; G. Bonetta, *Corpo e nazione. L'educazione ginnastica, igienica e sessuale nell'Italia liberale*, Milano, Franco Angeli, 1990; P. Ferrara, *L'Italia in palestra. Storia, documenti e immagini della ginnastica dal 1833 al 1973*, Roma, La Meridiana, 1992; N.S. Barbieri, *Dalla ginnastica antica allo sport contemporaneo. Lineamenti di storia dell'educazione fisica*, Padova, Cleup, 2002.

¹⁴ Sulle riviste educative milanesi cfr. S. Chillè, *Editoria e scuola a Milano. Il caso del «Risveglio Educativo»*, in G. Chiosso (ed.), *Scuola e stampa nell'Italia liberale. Giornali e riviste per l'educazione dall'Unità a fine secolo*, Brescia, La Scuola, 1993, pp. 51-66.

maggior parte dei ragazzi fra i sei e i dodici anni andava a scuola, nondimeno solo una minoranza frequentava gli istituti civici¹⁵. Egli aveva spiegato questo dato rilevando la più capillare diffusione sul territorio comunale delle scuole private e la loro disponibilità a custodire gli alunni anche nel pomeriggio. Per queste ragioni, a suo dire, gli istituti privati erano scelti anche da genitori non benestanti, impegnati tutto il giorno fuori casa per il lavoro.

Secondo la Commissione degli studi gli interventi che il Comune doveva promuovere per affrontare questo problema erano diversi: investimento sull'edilizia scolastica in primo luogo, miglioramento della condizione dei maestri, distribuzione gratuita dei libri ai fanciulli più bisognosi del corso inferiore in modo che la povertà non fosse motivo di evasione dall'obbligo scolastico¹⁶, organizzazione oraria più funzionale alle necessità dei genitori che lavoravano¹⁷. La Commissione proponeva che gli alunni restassero a scuola fino alle quattro. Al fine di non creare un aggravio eccessivo per i maestri e di non stancare gli alunni, essa suggeriva che fosse programmato un intervallo fra le undici e mezza e le due occupato, oltre che dal riposo, da esercizi ginnici e militari per i bambini e dalla ginnastica e dai lavori femminili per le bambine.

Voi non farete del resto – affermava il relatore Carlo Tenca – che introdurre nelle scuole elementari quell'insegnamento che è già attuato nelle scuole secondarie e che è comune ormai a tutti gli istituti educativi, e, chiamando un apposito maestro di ginnastica e rendendo meno necessaria l'assistenza dei maestri ordinarj, otterrete di protrarre l'orario a quel limite che è più desiderato dai genitori¹⁸.

Egli si rendeva conto che questa innovazione non poteva essere realizzata in tempi brevi; suggeriva tuttavia che venisse introdotta progressivamente nelle diverse sedi, cominciando da quelle dove era possibile.

L'intenzione di inserire la ginnastica nelle scuole cittadine, per quanto di non facile realizzazione, non restava però sulla carta, ma si traduceva in proposte concrete. Nel mettere a punto la Tabella degli stipendi relativi ai maestri, la Commissione civica degli studi prevedeva, infatti, anche la remunerazione degli incaricati di ginnastica e degli esercizi militari, pari a £ 800 annue. Su questa proposta si apriva un'interessante discussione in Consiglio comunale che, sia pure con diverse sfumature, concordava sull'importanza di questi docenti e della disciplina da loro professata¹⁹. Il consigliere Giulio Carcano, scrittore

¹⁵ Cfr. *Proposta per riordinamento della pubblica istruzione comunale. Commissione degli studi*, cit., pp. 63-64.

¹⁶ Secondo la Commissione per gli studi, occorre prendere esempio dalle «pie associazioni» che provvedevano di tutto ciò che era necessario agli alunni delle loro scuole, per «vincerle poi nella concorrenza col migliore e più sano insegnamento»: *Relazione della Commissione civica per gli studi sul riordinamento dell'istruzione comunale letta nella seduta del 6 maggio 1861 del Consiglio municipale*, cit., p. 25.

¹⁷ Cfr. *ibid.*, pp. 6-7, 25-26.

¹⁸ *Ibid.*, p. 26.

¹⁹ Cfr. *Riordinamento scolastico*, in *Atti del Municipio di Milano, annata 1861, seduta del 31*

e poeta, ma anche, in quel periodo, Provveditore agli Studi, riteneva che gli insegnanti di ginnastica fossero troppo remunerati rispetto agli assistenti e ai docenti di questa materia nelle secondarie. Ciò non di meno conveniva con le spiegazioni date da Belgioioso e Tenca che rilevavano

la difficoltà dello istruire nella ginnastica l'età tenera senza pericolo, e la gravezza dell'occupazione sia perché estesa a più scuole per ciascun incaricato, sia perché quotidiana, sia perché perdurante appunto ogni dì, presso ad ore 2 e mezza quante se ne [richiedevano] d'intervallo fra gli studi volendosi trattenere alla scuola [...] i fanciulli fino alle quattro²⁰.

Tenca precisava anche che questi docenti erano degli incaricati da confermare annualmente; da parte sua, il consigliere V. Crivelli considerava opportuno sottolineare che erano richieste persone che avessero «carattere rispettabile e vera bontà di cuore ed amabilità». P. Chiapponi, medico, primario dell'Ospedale Maggiore, si diceva spiaciuto per il carattere di transitorietà che avevano tali insegnanti, mentre era auspicabile che «assurgessero alla scienza» come avveniva in altri Paesi stranieri, specie in Svezia, «studiando con impegno di molta intelligenza non la violenza degli esercizi ma il gradato sviluppo di tutta la muscolatura e l'opportunità individuale de' movimenti, sicché la sobole [crescesse] pieghevole, sana, robusta»²¹. Tenca conveniva con tale desiderio ma faceva notare che, fin tanto che non si fosse pervenuti a formare docenti dotati delle abilità descritte, non era conveniente in quella fase rendere stabili gli incaricati. Interveniva anche P. Mantegazza, docente, in quel periodo, di Patologia all'Università di Pavia e negli anni successivi prolifico divulgatore, nell'ambito della cultura del *self-help*, di nozioni igienico-sanitarie²²; egli auspicava che l'insegnamento della ginnastica fosse assicurato anche alle alunne e chiedeva lumi alla Commissione. Tenca rispondeva che avrebbero provveduto all'insegnamento per le ragazze gli stessi docenti delle classi maschili. Come suggerito anche da altri consiglieri, la Commissione acconsentiva a correggere la pianta del personale addetto alle elementari nel senso che la voce di spesa relativa agli insegnanti di ginnastica era unica per le scuole maschili e per quelle femminili. Il Consiglio comunale approvava.

Lo stile laconico dei verbali delle sedute consiliari non ci consente di ricavare dal dibattito in aula ulteriori informazioni sulle motivazioni su cui si fondava la proposta di inserire la ginnastica nelle scuole primarie avanzata

maggio 1861, Milano, Pirola, [s.d.], pp. 191-195.

²⁰ *Ibid.*, p. 193. Su G. Carcano si veda il profilo curato da R. Negri, in DBI, Vol. XIX (1976), pp. 740-742.

²¹ *Riordinamento scolastico*, in *Atti del Municipio di Milano, annata 1861, seduta del 31 maggio 1861*, cit., p. 193. Su P. Chiapponi si veda Colombo, *Come si governava Milano*, cit., pp. 241, 247-248.

²² Su P. Mantegazza ci si limita a richiamare il profilo biografico, curato da G. Armocida e G.S. Rigo, in DBI, Vol. LXIX (2007), pp. 172-175; e quello redatto da A. Carli, in DBE, Vol. II (L-Z), pp. 89-90.

dalla Commissione per gli studi e accolta dall'amministrazione cittadina. Indubbiamente gli interventi di Chiapponi e di Mantegazza rinviavano alla cultura medica che sosteneva e avrebbe vieppiù sostenuto negli anni successivi l'utilità di questa disciplina per il rafforzamento della popolazione italiana sotto il profilo igienico-sanitario²³. Non a caso, come si è visto, il primo faceva esplicito riferimento alla scuola svedese che, come è noto, rispetto a quella tedesca, tutta centrata sulla dimensione etico-militare, con maggiore forza sottolineava le finalità terapeutiche degli esercizi ginnici.

La proposta si radicava inoltre in un contesto – quello milanese – che già nella prima metà dell'Ottocento si era mostrato attento, sia pure limitatamente a alcuni ambiti, alla ginnastica. Interventi su questo tema erano stati pubblicati già nel 1819 da «Il Conciliatore» che, nel mettere a confronto i sistemi educativi di Paesi stranieri con quelli vigenti nelle diverse regioni italiane, aveva denunciato le negative conseguenze di una formazione prevalentemente attenta alla dimensione intellettuale e spirituale sulla formazione dei giovani connazionali appartenenti alla classe dirigente, meno aiutanti e meno temprati a affrontare le difficoltà della vita dei loro coetanei inglesi che praticavano attività sportive²⁴. Di lì pochi anni, nel 1825, sempre a Milano, il direttore del Collegio reale degli orfani militari, il colonello E. Young²⁵, aveva dato alle stampe il volume *Ginnastica elementare o sia corso analitico graduato degli esercizi atti a sviluppare ed a fortificare l'organizzazione dell'uomo estratto dalle opere di celebri autori di ginnastica professori Clias e Guts-Muths*. Il testo non si segnalava per l'originalità di pensiero, rinviando, come si evince dal titolo, a due eminenti esponenti della riflessione teoretica sull'argomento. Esso però otteneva molto successo, anche all'estero, per la sua agevole struttura e per la capacità di una traduzione didattica della ginnastica in un corso di esercizi posti in ordine crescente di difficoltà. La fortuna dell'opera si spiega però anche con «l'humus di rinnovamento culturale e sociale della città ambrosiana che [produceva] una crescente domanda di ginnastica educativa, la quale [era] ormai diffusa un po' ovunque nei luoghi deputati all'educazione e negli ambienti intellettuali»²⁶.

Va poi ricordato che, dalla metà degli anni Trenta, sorgevano anche a Milano gli asili alla cui fondazione aveva dato un rilevante contributo Giuseppe Sacchi,

²³ In merito cfr. C. Pogliano, *L'utopia igienista (1870-1920)*, in *Storia d'Italia, Annali*, Vol. VII, *Malattia e medicina*, a cura di F. Della Peruta, Torino, Einaudi, 1984, pp. 587-631.

²⁴ Cfr. Bonetta, *Corpo e nazione*, cit., pp. 52-54. L'attenzione de «Il Conciliatore» per la ginnastica si iscrive nel più ampio interesse per le questioni educative manifestato dalle riviste politiche e culturali del Risorgimento: cfr. V. Mazzucchelli, *L'educazione popolare. Dibattiti e strutture*, in *Problemi scolastici ed educativi nella Lombardia del primo Ottocento*, cit., pp. 9-92; D. Maldini Chiarito, *Scuola, insegnanti e programmi nei fogli scolastici di Milano*, in G. Chiosso (ed.), *Scuola e stampa nel Risorgimento*, Milano, Franco Angeli, 1989, pp. 63-85.

²⁵ Sul Collegio di San Luca, al cui interno operò anche Young, si veda S. Polenghi, *Fanciulli soldati. La militarizzazione dell'infanzia abbandonata nell'Europa moderna*, Roma, Carocci, 2003, pp. 151-171.

²⁶ Bonetta, *Corpo e nazione*, cit., p. 54.

in qualità di segretario della Commissione degli asili. Nel prendere le mosse dal modello di Aporti, con il quale fu in rapporti di amicizia, ma confrontandosi anche con le esperienze realizzate all'estero nell'ambito dell'educazione infantile (in specie in Francia), egli applicava negli istituti ambrosiani il metodo del religioso cremonese, cui apportava però alcune correzioni e che egli preferiva definire sperimentale²⁷. Ritenendo che l'educazione dovesse muovere dallo sviluppo psicologico e fisiologico del bambino, Sacchi, al pari comunque dell'abate Aporti, prevedeva che negli istituti milanesi fosse presente la ginnastica che doveva essere di tipo «callistenico», ovvero associare ai movimenti regolari della persona la formazione della bellezza e della grazia²⁸.

Insomma, gli ambienti intellettuali milanesi partecipi delle vicende risorgimentali, cui appartenevano anche gli uomini alla guida dell'amministrazione cittadina, non solo erano convinti del potere dell'educazione di redenzione individuale e di miglioramento culturale e economico della società, ma guardavano altresì con attenzione alla valenza formativa della ginnastica, cui affidavano, come aveva affermato l'assessore all'Istruzione Visconti Venosta e come si vedrà meglio nelle pagine che seguono, una funzione di riposo dalle fatiche intellettuali, di irrobustimento del corpo e di preparazione – per quanto riguardava i ragazzi – ai propri doveri di difesa della patria.

Come già detto, la proposta della Giunta fu recepita e approvata dal Consiglio comunale, ma, nonostante l'ottimismo che ispirava la prima relazione della Commissione per gli studi del 1861, non poté essere applicata subito, mancando il personale preparato e gli spazi adeguati. Nel rapporto presentato nel luglio del 1862, in cui si dava conto del lavoro di riordino svolto nell'anno scolastico appena terminato, la Commissione riferiva le difficoltà incontrate sotto questo profilo ma anche gli sforzi profusi²⁹. Innanzi tutto, Tenca, nella sua funzione di relatore, riconosceva che la ginnastica poteva avere luogo solo in «qualche scuola meglio fornita dell'altre di adatto cortile». L'ammissione di questo limite non doveva però, a suo giudizio, distogliere il Comune dal proposito di introdurre nelle elementari gli esercizi ginnici, dei quali, con maggiori argomentazioni rispetto all'anno prima, era ribadita l'importanza per la salute del popolo. Si legge, infatti, nella relazione: «A questi tuttavia converrà porgere seria attenzione, giacché, importantissimi qual ramo di pedagogia, sono in particolar modo richiesti dai bisogni della nostra popolazione, flagellata dalla

²⁷ Su Sacchi, per quanto riguarda il suo impegno in ambito educativo, cfr. E. Bignami, *Giuseppe Sacchi e la pedagogia del Risorgimento*, «Rivista Pedagogica», fasc. II, 1935, pp. 252-283; fasc. III-IV, 1935, pp. 367-429; e il recente documentato profilo biografico curato da S. Polenghi in DBE, Vol. II (L-Z), pp. 448-449.

²⁸ G. Sacchi, *Il primo addestramento dell'infanzia e della puerizia giusta i metodi della scuola sperimentale italiana*, Milano, Agnelli, 1885, citato in Bignami, *Giuseppe Sacchi e la pedagogia del Risorgimento*, cit., p. 404. Si segnala che il termine callistenia era usato soprattutto in riferimento alla ginnastica femminile.

²⁹ Cfr. *Rendiconto e proposte della Commissione per gli studi*, in *Atti del Municipio di Milano, annata 1862, seduta del 2 luglio 1862*, Milano, Pirola, [s.d.], pp. 193-194.

scrofolo e dalla rachitide al punto da non dare da più anni l'intero contingente alla leva militare».

Sulla base di questa convinzione, il Comune, «fin dal principiare dell'anno scolastico», aveva aperto un concorso «pei posti di maestro». Esso però aveva dovuto ben presto prendere atto che occorreva andare cauti nella scelta «trattandosi di fanciulletti di tenera età e di discipline e metodi inusati fra noi». La Commissione per gli studi si trovò cioè a fare i conti non solo con l'assenza di una normativa in materia, ma anche con la mancanza in Milano di una «una scuola razionale di ginnastica» dedicata alla formazione di istruttori di ginnastica educativa per bambini e bambine delle scuole primarie. Per questo motivo, riferiva Tenca, ci si era rivolti a Torino dove, come egli stesso spiegava ai suoi colleghi consiglieri, era impegnato in questo settore «un distinto professore straniero», ovvero R. Obermann³⁰.

Come è risaputo, questi, chiamato in Piemonte nel 1833, insegnava la ginnastica ai vari corpi dell'esercito e progressivamente aveva esteso il proprio magistero alla sfera civile, coinvolgendo via via un numero sempre più ampio di persone, grazie all'appoggio dell'aristocrazia³¹. Proprio insieme a alcuni esponenti della nobiltà sabauda, aveva altresì fondato nel 1844 a Torino la Società Ginnastica, la prima in Italia³². Grazie soprattutto al suo presidente, Ernesto Ricardi di Netro³³, nella fase di costituzione del nuovo Regno italiano, l'associazione stringeva un rapporto privilegiato con il Ministero della Pubblica Istruzione, in virtù del quale il governo, di fatto, delegava alla Società la formazione degli insegnanti di ginnastica. Il Ministro De Sanctis, che più avanti avrebbe firmato la legge sull'introduzione della ginnastica in tutte le scuole italiane in quanto le riconosceva una funzione rilevante in ordine alla formazione dell'identità nazionale, accoglieva, infatti, la proposta del gruppo torinese e, con RD del 13 luglio 1861, istituiva il Corso magistrale gratuito di ginnastica per formare i docenti di questa disciplina da immettere nelle scuole italiane e la cui direzione era affidata al ginnasiarca svizzero³⁴.

³⁰ *Ibid.*, p. 194

³¹ L'opera di Obermann è stata presa in esame dalle diverse opere sin qui citate sulla ginnastica educativa in Italia, cui si rinvia anche per questo aspetto. Per un profilo aggiornato e per la bibliografia, anche più recente, sull'educatore si veda la voce curata da A. Magnanini, in DBE, Vol. II (L-Z), pp. 249-250.

³² Cfr. *Monografia della Società ginnastica di Torino e statistica generale delle scuole di ginnastica in Italia anno 1871-1872*, Torino, Botta, 1873, pp. 9 ss.; R. Gilodi, *La Reale Società Ginnastica di Torino. Sport e cultura nel tempo*, Torino, MAF Servizi, 1994.

³³ Si veda in merito la voce biografica redatta da M.C. Morandini in DBE, Vol. II (L-Z), p. 408.

³⁴ Sull'attenzione di De Sanctis per i temi della scuola, della formazione dell'identità nazionale degli italiani e, più in generale, per l'educazione, gli studi sono numerosi. Ci si limita, in questa sede, a richiamare il recente e documentato profilo steso da P. Morelli, in DBE, Vol. I (A-K), pp. 461-462.

Grazie al sodalizio fra Ministero della Pubblica Istruzione e Società torinese, quello di Obermann divenne il metodo di riferimento per la ginnastica educativa nelle scuole italiane almeno per il ventennio successivo. Si trattava di un metodo che rinviava all'opera del tedesco A. Spiess e che prevedeva la gradualità degli esercizi, a corpo libero, collettivi e figurativi, e con gli attrezzi, da svolgere nelle palestre. Le correzioni introdotte da Obermann, che avevano ulteriormente enfatizzato il carattere educativo, non avevano però annullato la decisa connotazione militare di derivazione prussiana, peraltro funzionale al processo di nazionalizzazione delle masse e di formazione di buoni soldati, oltre che di buoni cittadini, perseguito dalla classe dirigente dell'Italia liberale.

Dunque alla massima autorità in materia in Italia, ovvero a R. Obermann, il Comune di Milano chiedeva una consulenza per la selezione dei maestri di ginnastica alle elementari; egli – riferiva Tenca – aveva fornito utili consigli che però avevano convinto la Commissione che non si potevano avere maestri adatti senza la necessaria preparazione «specialmente per ciò che [riguardava] il sistema e le relazioni sue con la scienza educativa». Di qui la decisione di sospendere il concorso previsto e di formulare la proposta, sottoposta al voto del Consiglio comunale, di concedere il sussidio necessario (ovvero 400 £ a testa) a «quattro giovani fra i più istruiti e promettenti, - se maestri da preferirsi» da inviare a Torino a frequentare il Corso magistrale, della durata di tre mesi, da agosto a novembre, affinché «tornassero [...] atti a insegnare con profitto la ginnastica nelle [...] scuole». La relazione auspicava altresì che ai sussidi comunali si aggiunsero quelli della Provincia in modo che l'anno successivo ci fossero insegnanti sufficienti per le scuole maschili³⁵.

Non era neppure accantonata l'idea di estendere questa disciplina alle ragazze. L'ipotesi avanzata l'anno prima (ovvero che gli stessi docenti delle elementari maschili insegnassero anche alle alunne) si era rivelata non molto realistica. In un contesto già poco attento alla questione dell'educazione del corpo, la diffusione della ginnastica fra le donne sollevava anche maggiori perplessità, derivanti da riserve di ordine morale e dalle diffidenze delle famiglie, che peraltro si inserivano in un quadro sociale – non bisogna scordarlo – non proprio favorevole alla scolarizzazione femminile³⁶. Ciò non di meno, il Comune di Milano non abbandonava l'idea. Mancando una struttura per la formazione delle insegnanti analoga a quella maschile, che come vedremo sarebbe partita solo di lì a qualche anno sempre a Torino – anche per il vivo interessamento della

³⁵ *Rendiconto e proposte della Commissione per gli studi*, cit., p. 194.

³⁶ Sull'educazione femminile nel corso dell'Ottocento si vedano: S. Soldani (ed.), *L'educazione delle donne. Scuole e modelli di vita femminile nell'Italia dell'Ottocento*, Milano, Franco Angeli, 1989; C. Ghizzoni, S. Polenghi (edd.), *L'altra metà della scuola. Educazione e lavoro delle donne tra Otto e Novecento*, Torino, Sei, 2008; A. Ascenzi, *Il Plutarco delle donne. Repertorio della pubblicistica educativa e scolastica e della letteratura amena destinate al mondo femminile nell'Italia dell'Ottocento*, Macerata, eum, 2009. Si tornerà più avanti sulla diffusione della ginnastica femminile indicando anche gli studi sull'argomento.

municipalità ambrosiana –, esso chiedeva a Obermann di venire nel capoluogo lombardo per tenere lì il corso. La richiesta, se si pensa anche agli ostacoli che lo stesso ginnasiarca stava incontrando in Piemonte³⁷, testimoniava che la Commissione per gli studi e più in generale l'amministrazione ambrosiana erano sostenute da una solida convinzione, decisa a sfidare non solo gli oggettivi problemi strutturali, ma anche le resistenze culturali presenti nel Paese. Si legge, infatti, nella relazione del 1862:

Quanto alle femminili, l'insegnamento della ginnastica è per queste d'indole più delicata e speciale e vuol essere dato esclusivamente da maestre; e però noi ottenemmo dalla cortesia del prof. Obermann che si rechi fra noi a dare un corso magistrale straordinario da non durare più di tre o quattro settimane, e al quale tutte le nostre maestre potranno assistere. Noi avremo con ciò adempito nel miglior modo possibile all'incarico avuto, e fatto in guisa che una parte di educazione, troppo negletta fin qui, tanto negletta che nelle nostre scuole normali e magistrali è affatto ignota, prenda finalmente il posto che le si compete³⁸.

L'11 luglio del 1862 il Consiglio comunale prendeva in esame la proposta. Il dibattito non appariva così unanime come l'anno precedente³⁹. Da parte di alcuni si eccepiva non sull'inserimento della ginnastica in sé, di cui veniva riconosciuta l'importanza, ma sulla priorità di questa voce di spesa. Si esprimeva in tal senso Alberto Parola che non vedeva l'urgenza dell'insegnamento in questione e, ricordando le ristrettezze del bilancio comunale, riteneva forse più opportuno che il Comune riconoscesse di fronte allo Stato la mancanza di fondi necessari per questo scopo. In fase di voto, egli proponeva un emendamento che chiedeva il rinvio al successivo anno scolastico sempre che, nel frattempo, tramite concorso non si trovassero maestri adeguati. Tenca affermava, anche a nome di tutti i membri della Commissione, che era assolutamente contrario al rinvio in quanto protraeva anche per l'anno seguente «l'imbarazzo dell'attualità»⁴⁰. Messo ai voti, tale emendamento fu bocciato. Dubbi poi erano espressi sugli obblighi che i giovani sussidiati dal Comune contraevano nei confronti dell'amministrazione stessa una volta acquisita la patente per l'istruzione ginnica. In proposito la delibera approvata prevedeva, come aveva proposto la Commissione studi, che fossero sussidiati preferibilmente maestri.

A fronte di queste perplessità, vi era però anche chi sosteneva che il Municipio dovesse impegnarsi maggiormente in questo ambito. L'avvocato A. Mosca chiedeva se non fosse meglio fare venire a Milano un docente per formare più maestri, piuttosto che inviarne solo quattro a Torino. Tenca osservava che il tempo a disposizione era troppo breve per attuare la proposta: chiamare un professore da fuori significava prevedere gli spazi, la collocazione, ad esempio,

³⁷ Cfr. *Monografia della Società ginnastica di Torino*, cit., pp. 21-22.

³⁸ Cfr. *Rendiconto e proposte della Commissione per gli studi*, cit., p. 194.

³⁹ *Proposte della commissione per gli studi*, in *Atti del Municipio di Milano, annata 1862, seduta del 11 luglio 1862*, Milano, Pirola, [s.d.], pp. 235-238, in partic. pp. 235-237.

⁴⁰ *Ibid.*, p. 237.

presso una società ginnica che a Milano non c'era. D'altro canto, precisava il letterato, Obermann, cui la Commissione si era rivolta, era già troppo occupato e, solo dopo forti pressioni, aveva accettato di raggiungere il capoluogo lombardo per venti giorni per istruire le maestre. Il consigliere comunale proponeva altresì di aumentare le somme stanziare a bilancio al fine di creare anche nel capoluogo lombardo una scuola magistrale autunnale di ginnastica in modo da formare adeguatamente tutto il personale docente necessario alle scuole e presentava un emendamento in tale senso, approvato all'unanimità. Superate le obiezioni di carattere economico sollevate da alcuni, la proposta della Commissione civica di concedere il sussidio a quattro giovani per la frequenza del Corso magistrale di Torino era approvata.

La discussione in Consiglio comunale lascia intuire che i motivi di dissenso nei confronti dell'inserimento della ginnastica non erano solo di carattere economico. L'emendamento approvato per avviare contatti con la Provincia, al fine di verificare la fattibilità della creazione di una scuola magistrale di ginnastica in città, non documenta solo l'interesse degli amministratori per la materia, ma anche la volontà di non dipendere totalmente dalla nuova capitale del Regno. Come ho altrove messo in luce⁴¹, a questa i milanesi guardavano come modello cui ispirarsi per rinnovare il sistema educativo ereditato dal periodo asburgico, senza però perdere di vista la specificità, le tradizioni del territorio lombardo e evitando di porsi in condizioni di sudditanza⁴², animati piuttosto dalla volontà di riconquistare il primato perso, anche in ambito educativo, con la nascita del Regno d'Italia che aveva sì significato la conquista della libertà, ma anche la perdita di prestigio e il ridimensionamento a una delle tante città della nazione.

Vòlte a sollecitare il Comune di Milano a trovare una propria strada, sul piano del rinnovamento pedagogico, senza perdere di vista le potenzialità locali appaiono le riflessioni formulate da «Patria e Famiglia» a commento della relazione della Commissione per gli studi del 1862. La rivista diretta da Giuseppe Sacchi esprimeva pieno appoggio all'introduzione della ginnastica nelle scuole primarie maschili e femminili, convinta che essa giovasse alla salute e all'educazione fisica di tutto il popolo. Riteneva però opportuno precisare, «in via meramente storica», che «l'insegnamento razionale della ginnastica» non era

⁴¹ Rinvio in merito a Ghizzoni, *Scuola e lavoro a Milano fra Unità e fascismo*, cit., in partic. il primo e il secondo capitolo.

⁴² Significativo il fatto che A. Parola, che pure, come si è visto, contestava le spese per l'invio a Torino dei futuri istruttori di ginnastica, sostenesse poi, nel corso dello stesso dibattito, che se non era necessaria la patente per insegnare questa materia si potevano mandare due studenti a Torino e due a Napoli: *Proposte della commissione per gli studi*, in *Atti del Municipio di Milano, annata 1862, seduta del 11 luglio 1862*, cit., p. 236. La città partenopea, come è noto, fu uno dei centri di diffusione della ginnastica nel corso dell'Ottocento, attivandosi per la sua promozione nelle scuole e per la preparazione del personale docente dopo l'Unità; si vedano in merito: Ministero della Pubblica Istruzione, *L'educazione fisica e la ginnastica educativa in Italia nel secolo XIX. Leggi. Decreti. Regolamenti. Programmi. Circolari*, Roma, Cecchini, 1900, p. 37; Ferrara, *L'Italia in palestra*, cit., pp. 47-49.

assente da Milano (come si ricorderà aveva, invece, affermato la Commissione per gli studi), assicurato, fin dall'anno prima, dalle conferenze autunnali per i maestri e le maestre di campagna, promosse dall'ispettore scolastico provinciale e tenute dal prof. Lecomte. Questi, riferiva il periodico, dopo avere insegnato i vari esercizi corporei sia per i maschi che per le femmine che si potevano svolgere nelle scuole, aveva fatto conoscere anche tutti quei movimenti e quegli esercizi utili per «rimuovere gravi pericoli alla salute ed alla vita, e che [servivano] a dar ajuto a chiunque si [trovasse] in pericolo». Dopo questo corso teorico, egli era stato assunto dal Regio istituto dei sordomuti di Milano per continuare lì l'insegnamento della ginnastica⁴³. La rivista riteneva doveroso ricordarlo affinché non si credesse che nel capoluogo lombardo mancassero «distinti professori di ginnastica» e che vi fosse «l'urgenza di ricorrere al maestro Obermann», inviando a Torino giovani che potevano essere istruiti in città, con minore dispendio di denaro⁴⁴. Se i rilievi di «Patria e Famiglia» indubbiamente erano espressione della volontà di difesa delle tradizioni educative locali, essi nondimeno lasciavano trasparire una certa insofferenza per il ruolo egemone che Torino stava conquistando in questo periodo nell'ambito della ginnastica educativa e che, di lì a qualche anno, sarebbe stato contrastato dal polo veneto-romagnolo⁴⁵.

2. *L'avvio della ginnastica nelle scuole primarie maschili*

Al di là delle discussioni, il sussidio concesso ai giovani per frequentare il Corso magistrale di Torino consentiva all'amministrazione ambrosiana, una delle poche fino a quel momento in Italia, di attivare l'insegnamento della ginnastica educativa nelle scuole elementari civiche dall'anno scolastico 1862-1863⁴⁶. I quattro maestri tornati dalla capitale insegnarono gli esercizi ginnici secondo il metodo appreso da Obermann nelle scuole dotate di un cortile sufficientemente ampio da consentire «l'allineamento e le evoluzioni simultanee

⁴³ *Il riordinamento della pubblica istruzione in Milano*, «Patria e Famiglia», vol. II, 1862, pp. 315-331 (la citazione è a p. 328). Il prof. Maurizio Lecomte o Le Comte, come si trova invece citato nella fonte indicata in questa nota, dopo avere insegnato durante il governo austriaco, come maestro privato, aritmetica, geometria e geografia, dal 1861 e per tutti gli anni Sessanta figura come docente di contabilità presso la Scuola tecnica governativa di Contrada del Cappuccio e dal 1862 anche come maestro di ginnastica presso il Regio Istituto dei sordomuti di Milano: si rinvia per queste notizie a «Guida di Milano» (Milano, Tipografia Bernardoni) per i singoli anni considerati.

⁴⁴ *Il riordinamento della pubblica istruzione in Milano*, cit., p. 329.

⁴⁵ Si veda in merito: Ferrara, *L'Italia in palestra*, cit., pp. 87-112.

⁴⁶ Sulle iniziative delle amministrazioni municipali dopo l'Unità, e prima della Legge De Sanctis, brevi cenni in Bonetta, *Corpo e nazione*, cit., pp. 78-81, pp. 95-96; Ferrara, *L'Italia in palestra*, cit., pp. 40-60.

di una schiera alquanto numerosa di fanciulli»⁴⁷. Le sedi interessate furono quattro delle sei scuole elementari maggiori maschili (cioè con il corso di studi completo di quattro classi), ovvero quelle di S. Orsola, S. Simpliciano, S. Spirito e Piazza delle Galline⁴⁸. Benché esse difettassero ancora di una buona parte degli attrezzi necessari⁴⁹, grazie allo «zelo» e alla «perizia» dei maestri, i risultati raggiunti superarono le aspettative, secondo la relazione della Commissione civica per gli studi presentata in Consiglio comunale nel settembre del 1863. Il rapporto sottolineava i benefici di questa istruzione sotto il profilo sia fisico che morale. Si legge nel documento in questione:

Chi ha visto quei bambini, nel loro modesto uniforme di tela, compiere le mosse più ardite e leggiadre e manovrare colla spigliatezza e colla precisione di uomini provetti, ha dovuto meravigliare dell'alacrità impressa a quei teneri corpi e dell'intelligenza destata nelle loro menti sul carattere dei movimenti eseguiti. Grande beneficio soprattutto della disciplina, la quale è tanto più osservata quanto è meglio compresa nel suo spirito educativo, essendo appunto la ginnastica strettamente connessa colla pedagogia, e mirando essa non solamente a dar vigore alle membra, ma ad educar l'animo al senso dell'ordine e dell'armonia⁵⁰.

Che l'entusiasmo non fosse solo di circostanza e dovuto all'ufficialità dell'occasione, ma esprimesse il sentire degli uomini della Commissione per gli studi trova conferma in una lettera di L. Rossari all'assessore Belgioioso in cui rendeva conto delle visite compiute presso le scuole primarie in occasione degli esami finali di ginnastica nel luglio del 1863:

Gino è partito avanti ieri l'altro, Tenca dopo la tua partenza non s'è più visto, per cui – scriveva Rossari – la povera Commissione così assottigliata non lo so come si regga in piedi, tanto più che la migliore delle sue colonne che ora la sostengono, Rodriguez, è tutta ingolfata negli esami al suo istituto; egli però oggi assisterà [...] all'esperimento di ginnastica a S. Orsola; ed io assisterò domani e lunedì a quelli che si faranno in S. Simpliciano e a S. Spirito; m'increbbe d'aver dovuto mancare per indisposizione a quello che si fece ieri al Piazzale delle Galline, tanto più che amavo di poter fare un certo confronto, avendo io già assistito a un mezzo esperimento che s'era fatto a S. Spirito e del quale ero rimasto soddisfattissimo. Quel Martinelli ha fatto miracoli⁵¹.

⁴⁷ *Relazione della Commissione civica per gli studi letta nella seduta del Consiglio municipale del 25 settembre 1863*, Milano, Pirola, [s.d.], p. 5.

⁴⁸ Cfr. L. Rossari a P. Belgioioso, *Milano 24 luglio 1863*, in Carteggio Rossari, Archivio del Risorgimento, Parte generale, Civiche Raccolte Storiche, Milano (d'ora in avanti cit.: Carteggio Rossari).

⁴⁹ Sul tema della progettazione e predisposizione degli attrezzi per l'insegnamento della ginnastica nelle scuole, si veda il recente lavoro di D.F.A. Elia, *Giuseppe Pezzarossa's (1880-1911) gymnastics equipment workshop*, «History of Education & Children's Literature», vol. VII, n. 1, 2012, pp. 465-484.

⁵⁰ *Relazione della Commissione civica per gli studi letta nella seduta del Consiglio municipale del 25 settembre 1863*, cit., pp. 5-6.

⁵¹ L. Rossari a P. Belgioioso, *Milano 24 luglio 1863*, cit.

Paolo Martinelli, cui faceva riferimento Rossari, era uno dei quattro maestri che avevano seguito il corso di Obermann, come lo stesso insegnante milanese ricordava nel manuale di ginnastica che dava alle stampe subito dopo l'Unità con l'intenzione di fornire una guida ai colleghi e agli allievi che avessero voluto esercitarsi fuori dalla scuola⁵². Di fatto, dopo una Prefazione e un'Introduzione molto brevi (in totale 6 pagine su 134) in cui veniva spiegato cosa era la ginnastica⁵³, quali erano le parti del corpo, i tipi di comando e la posizione dell'alunno, e in cosa consistessero la «raccolta» e la «chiamata», il testo descriveva minutamente le regole dei diversi esercizi ginnici, suddivisi nei seguenti capitoli: Movimenti preliminari e disciplinari; Esercizi elementari; Esercizi con le bacchette; Passi ritmici o cadenzati; Schieramenti ed evoluzioni ginnastiche; Giochi ginnastici. Completava il volume una parte sulle esercitazioni militari, poiché, come spiegava Martinelli nella Prefazione, il Ministero aveva dimostrato la volontà di introdurre anche tale parte nelle scuole governative.

La buona prova data dai docenti di ginnastica portava il Consiglio comunale a confermare loro i sussidi per potere seguire, anche per quell'anno, le lezioni di Obermann come era stato chiesto dalla Commissione, su invito di Obermann stesso⁵⁴. Più problematica, a detta della stessa Commissione per gli studi, appariva la questione degli spazi. Al fine di supplire alle carenze, nell'immediato, si sarebbe cercato di fare convergere più scolaresche nelle scuole adatte. Viste le oggettive difficoltà che tale soluzione presentava (spostamento degli alunni, riduzione dei tempi di lezione per tutti ecc.) e poiché non era possibile attendere che tutti gli edifici fossero adeguatamente attrezzati, Tenca riferiva che di lì a poco la Commissione avrebbe presentato il progetto di creazione di una

⁵² Cfr. P. Martinelli, *Breve guida ai primi esercizi ginnastici con tavole relative aggiuntavi La teoria per la Scuola di Pelottone e di Compagnia del maestro Paolo Martinelli allievo del professore Cav. Obermann di Torino*, Milano, Gnocchi, [1862]. Dal 1861 Martinelli fu maestro delle scuole primarie milanesi prima del corso inferiore, poi dal 1866, del corso superiore. Fu anche incaricato della ginnastica per tutti gli anni Sessanta presso la scuola di Via S. Spirito, dove insegnava dal 1862. Si veda in merito: «Guida di Milano» (Milano, Tipografia Bernardoni) per i singoli anni considerati. Sulla manualistica scolastica per la ginnastica, fonte importante per illustrare la reale traduzione nella quotidianità della scuola delle teorie educative e dei modelli formativi, si veda ora il documentato lavoro di P. Alfieri, «A qual fine vero e proprio debba rispondere la ginnastica nelle scuole». *Emilio Baumann e la manualistica ad uso dei maestri elementari all'indomani della legge De Sanctis*, «History of Education & Children's Literature», vol. VIII, n. 2, 2013, pp. 195-220.

⁵³ Così è definita la ginnastica: «è quell'arte che, mediante progressivi e ben regolati esercizi, sviluppa le forze fisiche e nello stesso tempo le intellettuali dell'uomo, rendendo così il corpo di lui forte, agile e destro»: Martinelli, *Breve guida ai primi esercizi ginnastici*, cit., p. 1.

⁵⁴ *Relazione e proposte sulla pubblica istruzione*, in *Atti del Municipio di Milano, annata 1863, seduta del 25 settembre 1863*, Milano, Pirola, [s.d.], p. 335. Di fatto vi era già stata una deliberazione in merito fin dall'estate, iniziando il corso torinese in quel periodo. Così, infatti, scriveva Rossari a Belgioioso nella lettera già citata: «Per quei maestri che dovevano ritornare a Torino per compirvi il corso di ginnastica fu già provvisto; solo che al Martinelli il quale tempo fa mi aveva detto a bocca ch'egli avrebbe bisogno di ritardare di qualche giorno la sua andata parte per salute, parte per qualcosa di famiglia, ho risposto che facesse conoscere la cosa per iscritto alla Commissione»: *L. Rossari a P. Belgioioso, Milano 24 luglio 1863*, cit.

palestra sul modello di quanto era stato fatto a Torino, dove su un terreno, concesso ad uso gratuito per un ventennio dall'amministrazione, era stata edificata dalla Società ginnastica una palestra in cui anche le scuole comunali potevano svolgere le lezioni⁵⁵. Ancora senza soluzione appariva infine la questione dell'insegnamento della ginnastica presso le elementari femminili. Al consigliere Giuseppe Levi che chiedeva lumi in merito, Tenca rispondeva che questo disegno stava a cuore anche alla Commissione che quell'anno, come già l'anno prima, aveva invitato, ma senza successo, Obermann a venire a Milano per tenere un corso, sia pure breve, alle maestre⁵⁶.

Negli anni successivi questa prima applicazione della ginnastica veniva perfezionata e meglio regolamentata. Nel 1864 il Comune varava le *Discipline per le civiche scuole elementari*, in cui, nella sezione relativa agli insegnamenti speciali, erano dettate anche le norme per la ginnastica⁵⁷. Gli esercizi ginnici potevano essere svolti «negli intervalli di riposo; nelle ore precedenti o susseguenti alle esercitazioni nelle altre materie scolastiche, e nei giorni di vacanza». Essi dovevano tenersi almeno due volte la settimana per classe, entro «il recinto della scuola». Assolutamente vietate erano le passeggiate ginnastiche e, qualora fosse stato necessario radunare gli allievi in altri luoghi, doveva essere chiesto il permesso alla Sovrintendenza scolastica che avrebbe stabilito i modi e i tempi. Per essere ammessi, gli alunni dovevano avere l'assenso dei genitori. Un articolo era dedicato alla questione delle uniformi: benché, si faceva notare, fosse opportuno che tutti fossero vestiti in modo uguale e adatto all'attività svolta, non se ne poteva fissare l'obbligo. Le direzioni erano anzi invitate a impedire ogni sorta di «pressione morale» sugli allievi da parte di chiunque. In ogni caso, se una scuola avesse voluto adottare un'uniforme, doveva informare il Comune⁵⁸.

Insomma dal Regolamento comunale emerge chiaramente la volontà di stabilire norme chiare e rigide: si pensi all'interdizione all'uscita per le passeggiate (pure previste da Obermann) o all'obbligo di restare entro il «recinto» della scuola. Tale volontà di controllo, in piena sintonia con tutto il Regolamento, si sposava però a sensibilità educativa, laddove si affrontava la questione dell'uniforme, che per molte famiglie rappresentava un onere non sostenibile di cui non si coglieva sicuramente la necessità. L'introduzione della ginnastica educativa, secondo l'impostazione data da Obermann, era destinata a evidenziare nel tempo anche altre criticità. La simultaneità dei movimenti negli esercizi di disciplina o ordinativi, elementari (movimento del capo, del busto,

⁵⁵ *Monografia della Società ginnastica di Torino*, cit., pp. 15-16.

⁵⁶ *Relazione e proposte sulla pubblica istruzione*, in *Atti del Municipio di Milano, annata 1863, seduta del 25 settembre 1863*, cit., p. 335.

⁵⁷ Cfr. *Discipline per le civiche scuole elementari di Milano, 29 ottobre 1864*, in *Atti del Municipio di Milano, annata 1864*, Pubblicazioni del Municipio di Milano, Milano, Pirola, [s.d.], pp. 524-533.

⁵⁸ *Ibid.*, p. 531.

delle estremità inferiori e superiori), con le bacchette e combinati⁵⁹, da eseguire in modo sincronico e con eguale agilità, doveva creare alcuni problemi didattici visto che le classi erano composte anche da 60 o 70 studenti che presentavano diversi livelli di sviluppo mentale e fisico. Di qui il «temperamento» delle esercitazioni ginniche previsto dall'assessore alla Pubblica Istruzione nel 1867 per gli alunni più gracili, aggregati ai più piccoli con l'avvertenza però che questa separazione non fosse vissuta da loro come un'umiliazione. Osservava in merito Rossari, in una lettera all'assessore Belgioioso:

Riguardo a quel temperamento di cui abbiamo parlato ieri intorno agli esercizi di ginnastica per gli alunni più gracili, mi pare che nel suggerirlo alle Direzioni convenga spenderci qualche parola intorno, onde ovviare al pericolo che tale segregazione provochi dileggio da una parte e sia causa di mortificazioni dall'altra: converrebbe dunque mostrare che anche in ciò si confida nella prudenza e nella delicatezza dei dirigenti. Si potrebbe p[er] e[sempio] adoperarli (codesti gracili) come capofila nelle schiere dei piccini i quali naturalmente avranno esercizi più leggeri [...]. Dove poi, per troppo numero, l'eccezione non potesse a meno di non apparire, i dirigenti facciano di giustificarla presso il grosso della scolaresca in modo che ecciti compatimento e rispetto⁶⁰.

Così impostata la ginnastica educativa nelle elementari maschili milanesi registrava negli anni a seguire ulteriori progressi. Dopo i primi quattro maestri inviati a Torino nel 1862, nel 1864 l'amministrazione provvide a sussidiare altri due docenti⁶¹. Oltre a P. Martinelli, già ricordato, i docenti di ginnastica in servizio nelle scuole primarie cittadine durante tutto il primo decennio postunitario – e, a dire il vero, alcuni di loro anche per una buona parte degli anni Settanta – furono: Bardelli Angelo, Bizzozzero Carlo, cui subentrò dal 1867 Fortunati Angelo, Lomazzi Ippolito, Ronchi Giovanni, Zibecchi Luigi, tutti maestri delle scuole primarie fin dai primi anni Sessanta⁶². Grazie a loro, le esercitazioni ginniche furono garantite in tutte le sei scuole elementari maggiori maschili esistenti in città dall'anno scolastico 1864-1865. Nelle minori maschili (quelle cioè che avevano solo il corso inferiore) la ginnastica fu inserita dal 1868-1869, sia pure, agli inizi, in una sola sede sulle sei presenti in Milano (quella in via S. Croce)⁶³.

⁵⁹ Di questi esercizi si trovano la descrizione e l'illustrazione con figure nel testo scritto da P. Martinelli citato alla nota 52.

⁶⁰ L. Rossari a P. Belgioioso, 10 dicembre [1867], in Carteggio Rossari.

⁶¹ Cfr. *Relazione della Commissione civica per gli studi letta nella seduta dell'8 maggio 1865 del Consiglio municipale*, s.l., [s.d.], p. 6; *Rapporto e proposte della Commissione civica degli studi*, in *Atti del Municipio di Milano, annata 1865, seduta del 9 maggio 1865*, Milano, Pirola, [s.d.], p. 259.

⁶² Si veda in merito «Guida di Milano» (Milano, Tipografia Bernardoni) per gli anni dal 1861 al 1867.

⁶³ Per i dati sulla diffusione della ginnastica nelle elementari tra il 1865 e la fine degli anni Sessanta, si vedano: *Relazione della Commissione civica per gli studi letta nella seduta dell'8 maggio 1865 del Consiglio municipale*, cit., p. 6; *Relazione della Commissione degli studi concernente gli anni 1865-1866 e 1866-1867, e proposte*, in *Atti del Municipio di Milano, annata*

Soddisfazione esprimevano i membri della Commissione civica, al termine del proprio mandato nel 1868, sull'andamento della ginnastica nelle primarie maschili. Nei saggi di fine anno, così come in quelli tenuti in occasione della Festa dello Statuto, di cui si dirà, i fanciulli avevano mostrato «una snellezza, un ardimento superiore all'età». Chi vi aveva assistito doveva ammettere che la ginnastica temprava la gioventù sul piano morale e fisico, formando «sicurezza e indipendenza del carattere» e preparando una «virilità forte e generosa»⁶⁴. La sua presenza completava la formazione ricevuta dai fanciulli, la maggior parte dei quali, nelle classi del corso inferiore, aveva come insegnanti le maestre, introdotte nelle scuole maschili subito dopo l'Unità dall'amministrazione ambrosiana, sia perché mancavano uomini che volessero fare i maestri sia perché la loro preparazione, in occasione dei concorsi banditi, era stata sicuramente migliore di quella dei loro colleghi⁶⁵. Se infatti il magistero femminile riusciva a «ingentilire i modi e a dare compostezza», gli esercizi ginnici abituavano «al coraggio e alla fiducia nelle proprie forze» e distoglievano «da ogni mollezza di costume e di pensieri»⁶⁶.

1868, seduta del 25 maggio 1868, Milano, Pirola, [s.d.], p. 170; *Rendiconto morale dell'annata 1869*, *ibid.*, annata 1870, seduta del 26 novembre 1869, Milano, Pirola, [s.d.], p. 15; «Guida di Milano» (Milano, Tipografia Bernardoni) per tutti gli anni Sessanta. Sul numero di scuole elementari presenti in città e sulla loro ubicazione cfr.: Giunta municipale della città di Milano. *Scuole elementari maschili e femminili. Avviso 12 ottobre 1865*, in *Atti del Municipio di Milano, annata 1865*, Pubblicazioni del Municipio di Milano, Milano, Pirola, [s.d.], pp. 508-509; Giunta municipale della città di Milano. *Scuole elementari maschili e femminili. Avviso 15 ottobre 1866*, *ibid.*, annata 1866, Pubblicazioni del Municipio di Milano, Milano, Pirola, [s.d.], pp. 419-420; Municipio di Milano, *Scuole elementari maschili e femminili. Avviso 23 ottobre 1867*, *ibid.*, annata 1868, Pubblicazioni del Municipio di Milano, Milano, Pirola, [s.d.], pp. 434-435; Giunta municipale di Milano. *Scuole elementari maschili e femminili. Avviso 16 ottobre 1868*, *ibid.*, Pubblicazioni del Municipio di Milano, Milano, Pirola, [s.d.], pp. 593-594; Giunta municipale di Milano, *Scuole elementari maschili e femminili. Avviso 9 ottobre 1869*, *ibid.*, pp. 670-671.

⁶⁴ *Relazione della Commissione degli studi concernente gli anni 1865-1866 e 1866-1867*, cit., p. 170. Sul piano quantitativo, si segnala il buon 'posizionamento' della provincia di Milano (seconda dopo Torino), in merito alla diffusione della ginnastica nelle scuole, nelle inchieste governative condotte in questo periodo: cfr. *Statistica delle scuole di ginnastica del Regno d'Italia. Anno 1863-64*; *Statistica delle scuole di ginnastica del Regno d'Italia. Anno 1871-1872*, in *Monografia della Società ginnastica di Torino*, cit., pp. 53-61.

⁶⁵ Cfr. *Relazione della Commissione degli studi concernente gli anni 1865-1866 e 1866-1867*, cit., pp. 169-170. È questo un aspetto che deve essere ancora adeguatamente indagato. Esso si radica nei provvedimenti presi in Lombardia dagli Asburgo e conoscerà, nel corso dell'Ottocento, una forte espansione. Per il periodo preunitario si veda: Polenghi, *La formazione dei maestri nella Lombardia austriaca*, cit., pp. 82-87. Per i decenni successivi all'Unità si rinvia a Ghizzoni, *Cultura magistrale nella Lombardia del primo Novecento*, cit., pp. 65-66, 283-324.

⁶⁶ *Relazione della Commissione degli studi concernente gli anni 1865-1866 e 1866-1867*, cit., p. 170.

3. *Gli sviluppi nella seconda metà degli anni Sessanta: i saggi all'Arena, la ginnastica nelle scuole femminili, la Palestra civica*

Diversamente da quanto previsto dalla normativa comunale, già dal 1864 la ginnastica usciva dal «recinto» scolastico per entrare a pieno titolo nell'arena dello spazio pubblico. Da quell'anno, infatti, il Comune di Milano volle che nel rituale della Festa dello Statuto⁶⁷, la prima domenica di giugno, fosse inserito il saggio ginnico degli alunni delle scuole primarie, a conferma della connotazione etica e militare della disciplina derivata da Obermann, ma anche della volontà del Municipio di rinforzare la funzione della scuola in ordine alla formazione dell'identità nazionale. Già dal 1861 alla parata dell'esercito era seguita la rassegna degli alunni dei licei, dei pubblici e privati collegi e dell'orfanatrofio maschile⁶⁸.

Il coinvolgimento delle scuole era previsto anche dal cerimoniale della nuova Festa della nazione che, oltre alla parata militare, evento centrale della giornata, contemplava le premiazioni scolastiche. Era chiaro l'intento della classe dirigente dell'Italia liberale di sottolineare il ruolo della scuola, complementare a quello dell'esercito, nella costruzione dell'identità nazionale e di esaltare il valore del merito rispetto all'idea, tipica del passato, dell'istruzione come privilegio concesso⁶⁹. La partecipazione delle scuole, come peraltro l'esito di tutta la Festa dello Statuto, fu difforme nelle diverse realtà locali in quanto l'organizzazione dipendeva dalle singole amministrazioni municipali. Il capoluogo lombardo si distinse, sotto questo profilo, per l'impegno profuso nel coinvolgimento degli istituti civici. Due i momenti destinati dal Comune alle proprie scuole in quella giornata subito dopo l'Unità: la premiazione degli alunni più meritevoli delle

⁶⁷ Sulla Festa dello Statuto cfr. I. Porciani, *La festa della nazione. Rappresentazione dello Stato e spazi sociali nell'Italia Unita*, Bologna, il Mulino, 1997. Ma si vedano anche: U. Levra, *Fare gli italiani. Memoria e celebrazione del Risorgimento*, Torino, Comitato di Torino dell'Istituto per la storia del Risorgimento italiano, 1992; I. Porciani, *Stato e nazione: l'immagine debole dell'Italia*, in S. Soldani, G. Turi (edd.), *Fare gli italiani. Scuola e cultura nell'Italia contemporanea*, I: *La nascita dello Stato nazionale*, Bologna, il Mulino, 1993, pp. 385-428; B. Tobia, *Una patria per gli italiani*, Roma-Bari, Laterza, 1998; E. Gentile, *La Grande Italia. Il mito della nazione nel XX secolo*, Roma-Bari, Laterza, 2006.

⁶⁸ *Gli Istituti Educativi alla festa nazionale del 2 Giugno*, «Patria e Famiglia», vol. I, 1861, pp. 133-134.

⁶⁹ Sul coinvolgimento delle scuole nelle celebrazioni della Festa dello Statuto cfr. Porciani, *La festa della nazione*, cit., pp. 97-108. Sul ruolo della scuola nella costruzione dell'identità nazionale, si vedano, tra gli altri, F. Traniello, *Nazione e storia nelle proposte educative degli ambienti laici di fine Ottocento*, in L. Pazzaglia (ed.), *Cattolici, educazione e trasformazioni socio-culturali tra Otto e Novecento*, Brescia, La Scuola, 1999, pp. 61-91; A. Ascenzi, *Tra educazione etico-civile e costruzione dell'identità nazionale. L'insegnamento della storia nelle scuole italiane dell'Ottocento*, Milano, Vita e Pensiero, 2004; *Scuola e nazione in Italia e in Francia nell'Ottocento. Modelli, pratiche, eredità. Nuovi percorsi di ricerca comparata*, a cura di P.L. Ballini, G. Pécout, Venezia, Istituto Veneto di Scienze, Lettere ed Arti, 2007; A. Ascenzi, *Metamorfosi della cittadinanza. Studi e ricerche su insegnamento della storia, educazione civile e identità nazionale in Italia tra Otto e Novecento*, Macerata, eum, 2009.

Scuole serali superiori, estesa poi agli allievi delle serali elementari (dal 1862)⁷⁰, e il saggio ginnico.

Se è vero, come si è detto, che il cerimoniale della nuova Festa della nazione lo prevedeva, è comunque significativa la scelta del Comune di Milano di attribuire i premi in questa occasione proprio agli allievi delle serali⁷¹, istituite dalla municipalità a livello elementare e postelementare al fine sia di alfabetizzare e di dare una preparazione professionale, sia di infondere nei giovani e negli adulti, che tornavano sui banchi di scuola, i valori che cementavano la nuova identità nazionale. Con questo provvedimento essa intendeva incoraggiare coloro che, con non pochi sacrifici, riprendevano gli studi, motivarli a una frequenza assidua e a un impegno costante. Inoltre, come documentano molto bene i discorsi tenuti dalle autorità scolastiche in quella occasione, si voleva legare i giovani e gli adulti studenti-lavoratori non solo all'amministrazione che quelle scuole aveva promosso per il loro bene, ma anche alla nazione appena costituita. La consegna dei premi il giorno della festa dell'Unità nazionale stava a significare che l'educazione proposta andava oltre i confini della vita cittadina e guardava alle responsabilità del singolo nei confronti della patria.

Allo stesso progetto, volto a consolidare il nesso fra scuola e formazione dell'identità nazionale, è riconducibile la decisione di programmare in quella stessa data il saggio ginnico degli alunni elementari. In occasione della Festa dello Statuto nel giugno del 1864, al mattino circa 3.000 alunni maschi erano stati chiamati a raccolta nell'Anfiteatro dell'Arena e, alla presenza delle famiglie, il «piccolo esercito» aveva eseguito «ogni sorta di prove ginnastiche», dimostrando l'attenzione della scuola milanese anche per l'educazione del corpo, intesa a preparare le giovani generazioni alle «future lotte titaniche della nazione»⁷². L'esibizione pubblica nelle esercitazioni ginniche il giorno della celebrazione dell'Unità nazionale dimostrava con evidenza la finalità educativa di questo insegnamento teso alla rigenerazione dei giovani italiani per prepararli ai propri doveri di soldati, in virtù anche della connotazione militare presente nell'impostazione di Obermann e adottata, come si è visto, dai primi docenti delle elementari milanesi. L'esibizione, inoltre, era pensata per accreditare la nuova disciplina presso il popolo e per radicare negli alunni, che si preparavano all'evento per tutto l'anno, e nel pubblico presente l'idea di nazione e i valori che la fondavano. La connotazione pedagogica di questa festa era colta e a più riprese sottolineata dagli articoli pubblicati dalle riviste educative milanesi

⁷⁰ Cfr. *Scuole serali comunali di Milano. Prima solenne distribuzione de' premi fatta nel palazzo del Comune il 1 giugno 1862*, Milano, Pirola, [s.d.], *Gli istituti educativi alla festa dello Statuto*, «Patria e Famiglia», vol. IV, 1864, pp. 303-306.

⁷¹ Per la proposta formativa delle civiche scuole serali, elementari e superiori, rinvio a Ghizzoni, *Scuola e lavoro a Milano fra Unità e fascismo*, cit., pp. 21-68, in partic. per le premiazioni pp. 40-51. Si segnala che i premi agli alunni delle scuole elementari erano distribuiti in altri momenti dell'anno scolastico.

⁷² *Gli istituti educativi alla festa dello Statuto*, cit., p. 304.

fortemente intrisi di religiosità civile⁷³. Scriveva entusiasta «L'Educatore Italiano» nel 1865 a proposito del saggio proposto anche quell'anno all'Arena:

Chi vedeva i movimenti e gli esercizi di persona di tutto quello sciame di giovinetti, certo correva anche più in là col pensiero. Se tutti gli Italiani fossero unisoni nella volontà e nell'azione come sincroni sono i movimenti, di questi quasi tremila piedi, che come fossero un sol piede s'alzavano, ora a destra ora a sinistra, di altrettante mani che battevano tutte insieme in un batter d'occhio; ora vedevi tutte le fronti, ora tutti i profili in questi esercizi svariati delle estremità superiori ed inferiori, di evoluzioni ginniche, di passi ritmici, di maneggio di canne, che si chiusero in una generale rassegna⁷⁴.

Così come la parata militare, che ricordava e esaltava il contributo dato dai vari corpi dell'esercito al Risorgimento nazionale e la funzione che essi dovevano svolgere nell'Italia unita, coinvolgendo emotivamente gli spettatori per i colori delle divise, per le musiche, per la potenza della rappresentazione, tutta la coreografia del saggio ginnico era impostata per evocare e infondere nei presenti l'immagine della patria. La finalità educativa del saggio era sottolineata anche da «Patria e Famiglia» che, l'anno successivo, così descriveva l'evento:

I nostri giovani ginnastici magistralmente educati alla scuola dell'Obermann di Torino seppero così bene allineare le numerose falangi de' nostri alunni da renderli emuli delle mirabili evoluzioni dei veterani del nostro esercito. Ad un unico suono di tromba, vedevansi ad un tratto comporsi quelle ordinate file a mille combinazioni e figure. Ed ora simulavano un circolo, ora un quadrato, ora una stella. Né mai stavano immoti, ma con passi combinati a cadenze, ora marciavano battendo le palme, ed ora parevano vòlti in subita fuga. E quella fuga che pareva dapprima scompiglio, si ricomponeva da sé a nuove linee ed a gruppi plasticamente ordinati. Vi fu un momento che quelle migliaja di fanciulli si allinearono in sì magica guisa da formare colle loro stesse persone le gigantesche forme di questo sacro vocabolo *Italia*. E appena questa parola era formata levarono a schiere un triplice ordine di zendadi che riprodussero i tre colori della nazione.

Quella rappresentazione dell'Italia fatta dai giovani alunni delle scuole primarie aveva stupito e commosso i presenti: il periodico riteneva che si dovessero ringraziare i «valenti educatori» che avevano «saputo persino nei movimenti corporei toccar le fibre più riposte e più elette dell'anima italiana»⁷⁵. Insomma, il saggio all'Arena veniva a completare il progetto educativo che aveva portato l'amministrazione ambrosiana a inserire la ginnastica nelle scuole: con questa uscita pubblica delle esercitazioni degli alunni delle elementari civiche essa voleva consolidare in tutta la cittadinanza l'amore per la patria⁷⁶.

⁷³ Oltre alle opere citate alle note 67 e 69, sul tema si veda anche E. Gentile, *Le religioni della politica. Fra democrazie e totalitarismi*, Roma-Bari, Laterza, 2001.

⁷⁴ *L'istruzione ed educazione nella festa nazionale*, «L'Educatore Italiano», vol. IX, n. 23, 8 giugno 1865, pp. 181-182 (la citazione a p. 181).

⁷⁵ *Le scuole primarie di Milano alla festa dello Statuto*, «Patria e Famiglia», vol. VI, 1866, pp. 249-250 (la citazione a p. 249).

⁷⁶ Alcuni studi, dedicati all'organizzazione degli spazi urbani, alla toponomastica,

Nel frattempo, il Comune di Milano si prodigava per dare soluzione a due altri problemi ancora aperti alla metà degli anni Sessanta: la carenza di spazi adeguati e l'insegnamento della ginnastica nelle elementari femminili. Per quanto riguarda quest'ultimo aspetto, se ancora nel 1864 la Commissione per gli studi si doleva perché Obermann procrastinava continuamente la sua venuta a Milano per formare le maestre⁷⁷, nella relazione presentata nel maggio del 1865 essa affermava di avere abbandonato questa idea e di essere pervenuta alla convinzione di mandare le insegnanti comunali a Torino per ricevere la necessaria preparazione⁷⁸. Per questo motivo chiedeva al Consiglio comunale di concedere il necessario sussidio a sei maestre che «nel prossimo autunno» avrebbero seguito «un corso speciale di ginnastica»⁷⁹.

Di fatto, come è noto, solo nel 1867, fu possibile avviare nel capoluogo piemontese il corso magistrale di ginnastica per le donne⁸⁰. La relazione della

all'occupazione degli spazi simbolici, hanno rilevato la «consapevolezza del proprio ruolo pedagogico» dimostrata dalle amministrazioni che si succedettero a Palazzo Marino nei primi trent'anni di vita unitaria: B. Bracco, *Tendenze educative e istanze politiche della classe dirigente milanese: i luoghi dell'identità nazionale nella toponomastica del capoluogo lombardo dall'Unità alla Grande Guerra*, in L. Cavazzoli, C.G. Lacaita (edd.), *Riforme e istituzioni fra Otto e Novecento*, Manduria, Lacaita, 2002, pp. 395-426 (la citazione a p. 404); si veda anche Tobia, *Una patria per gli italiani*, cit., che ha fatto luce sulla peculiarità di Milano, dove dopo l'Unità si realizzò, rispetto a altre città, in specie Roma, un equilibrio fra «intento pedagogico e ed elaborazione culturale» nella costruzione del nuovo spazio urbano (p. VII).

⁷⁷ Documentano i rapporti intercorsi con Obermann le lettere di Rossari a Belgioioso tutte in Carteggio Rossari. Il 22 luglio 1864 egli scriveva: «Mi fa molto piacere l'intenzione del Signor Obermann di recarsi qui sullo scorcio di quest'autunno per fare quelle lezioni di ginnastica alle nostre brave giovani maestre. [...] Il tempo scelto dal prof. Obermann poi favorisce i miei gusti, perché per amor della ginnastica servirà differire di qualche settimana l'aprimento dell'esame di concorso, e così non occorrerà, come in questi anni passati, lasciare la campagna alla metà di ottobre, che è appunto il tempo più opportuno per le belle passeggiate». A ottobre, la speranza lasciava posto alla disillusione. L'educatore milanese affermava: «Desidero sentire che tu abbia visto il prof. Obermann e che abbiate potuto stabilire qualcosa intorno all'istruzione ginnastica femminile» (*L. Rossari a P. Belgioioso, Brusuglio 18 ottobre 1864*); di lì a una settimana osservava: «Mi rincresce che il prof. Obermann mandi in lungo il mantenimento della sua promessa. Era proprio desiderabile che si fosse potuto iniziare qualcosa dell'istruzione ginnastica femminile entro quest'anno!»: *L. Rossari a P. Belgioioso, Brusuglio, 24 ottobre 1864*.

⁷⁸ «Noi speriamo anche di potere tra non molto introdurre l'insegnamento della ginnastica nelle scuole femminili. L'avremmo anzi già fatto, se le assidue occupazioni avessero concesso al professor Obermann di recarsi a Milano per alcune settimane, come l'avevamo richiesto, a dare un corso speciale di ginnastica per l'istruzione delle nostre maestre. Non avendo potuto ottener ciò, né volendo tardare ancora alle bambine delle nostre scuole il beneficio di questo insegnamento, noi ci proponiamo di mandare sei maestre a Torino per esservi istruite durante le vacanze autunnali»: *Relazione della Commissione civica per gli studi letta nella seduta dell'8 maggio 1865 del Consiglio municipale*, cit., p. 8.

⁷⁹ *Ibid.*, p. 27.

⁸⁰ Non molti sono gli studi dedicati all'introduzione della ginnastica femminile nelle scuole italiane dopo l'Unità. Si veda in proposito: A. Teja, *Educazione fisica al femminile. Dai primi corsi di Torino di ginnastica educativa per le maestre (1867) alla ginnastica moderna di Andreina Gotta Sacco (1904-1988)*, Roma, Società Stampa Sportiva, 1995, pp. 9-27; D. Di Ferdinando, *Contro le bugie del cosmetico. Alle origini della ginnastica femminile*, «Lancillotto e Nausica», vol. VII, n.

Commissione civica del 1865 autorizza però a retrodatare il progetto dei torinesi di fondare una scuola per le insegnanti di ginnastica e a affermare che alla realizzazione del progetto contribuirono anche l'interessamento e le pressioni dell'amministrazione ambrosiana. Intenzionato a estendere la ginnastica anche alle donne, Obermann, a Torino, si era da tempo prodigato, con lezioni private, affinché questo potesse avvenire⁸¹. Tuttavia, fino alla metà degli anni Sessanta, ad eccezione delle esercitazioni svolte presso gli istituti di educazione privati, la ginnastica mancava nelle scuole femminili. Nel 1867 il disegno poteva concretizzarsi, in quanto il Comune di Torino incaricava la Società Ginnastica di tenere un primo corso gratuito per le maestre comunali «invitando con cortese atto di fratellanza ad approfittarne il Municipio di Milano, il quale accettò l'invito e inviò al corso cinque maestre milanesi», come ci informa la pubblicistica coeva⁸². L'amministrazione ambrosiana, infatti, riferiva Tenca nella relazione della Commissione civica presentata nel maggio del 1868, non aveva mai smesso di insistere presso Obermann perché «volesse almeno istruire alcune maestre» che sarebbero state mandate nel capoluogo piemontese «ad assistere alle sue lezioni»⁸³.

Insomma, se Torino, culla del movimento ginnico nazionale, ebbe il merito della creazione anche del primo percorso formativo destinato alle donne, riconosciuto poi dal Ministero della Pubblica Istruzione, si può affermare che Milano, sulla base di quanto siamo venuti dicendo, si prodigò attivamente per la realizzazione di questo obiettivo, da tempo perseguito, rivolgendosi ripetutamente al ginnasiarca svizzero affinché estendesse il proprio magistero alle donne insegnanti. La gratitudine espressa da Tenca a Ernesto Ricardi di Netro per l'accoglienza fatta alle docenti e per l'ospitalità mostrata conferma ulteriormente la collaborazione fra le due amministrazioni su questa questione⁸⁴. L'esperienza positiva compiuta nel 1867 e la volontà di procedere secondo il disegno tracciato fin dal 1861 portavano la Commissione a chiedere, anche per il 1868, la concessione di sussidi per l'invio a Torino di insegnanti. Il Consiglio comunale approvava. Dopo una prima, timida comparsa con alcune lezioni garantite dalle maestre rientrate dal corso nel 1867, dall'anno scolastico 1868-1869 il Comune di Milano introduceva la ginnastica con regolarità nelle elementari femminili, dapprima in tutte le cinque sedi delle scuole maggiori poi, pian piano, dai primi anni Settanta anche nelle minori⁸⁵.

1-2-3, 1990, pp. 42-49.

⁸¹ Cfr. *Monografia della Società ginnastica di Torino*, cit., p. 8.

⁸² *Ibid.*, p. 21.

⁸³ Cfr. *Relazione della Commissione degli studi concernente gli anni 1865-1866 e 1866-1867*, cit., p. 172; *Conto morale della gestione civica*, in *Atti del Municipio di Milano, annata 1868, seduta del 3 ottobre 1867*, Milano, Pirola, [s.d.], p. 18.

⁸⁴ Cfr. *Relazione della Commissione degli studi concernente gli anni 1865-1866 e 1866-1867*, cit., p. 172.

⁸⁵ Cfr. «Guida di Milano» (Milano, Tipografia Bernardoni) per gli anni 1869, 1870, 1871, 1872.

Come anticipato fin dal 1863, la Commissione per gli studi e la Giunta municipale, nel frattempo, affrontavano anche il problema degli spazi da destinare agli esercizi ginnici. Le oggettive carenze degli edifici scolastici, cui già si è fatto cenno, condizionavano lo svolgimento delle esercitazioni che si tenevano nei cortili e che ovviamente subivano le interruzioni dovute alle condizioni climatiche. Per questo motivo, nella relazione presentata in Consiglio comunale nel maggio del 1865⁸⁶, la Commissione avanzava la proposta di istituire una palestra in Porta Romana su un terreno di proprietà del Collegio Calchi Taeggi. Il prezzo dell'acquisto dell'area era ancora da definire tramite perizia, ma, in ogni caso, sarebbe stato detratto dal credito che il Comune vantava nei confronti del Collegio per i sussidi erogati per il suo ammodernamento⁸⁷. Il progetto della palestra era stato redatto consultando anche in questo caso Obermann, il quale si era prodigato in consigli e in descrizioni delle migliori strutture esistenti in Europa, nonché visitando le palestre costruite in città italiane. La relazione sosteneva la proposta in questione richiamando l'esempio dato già da altre località, quali Torino ovviamente, ma anche la più piccola Lodi, e sottolineando, ancora una volta, l'importanza della ginnastica dal punto di vista dell'educazione e della salute fisica del popolo.

Appunto perché – riferiva Tenca – le nostre scuole sono anguste, meschine, disagiate, appunto perché gli alunni, che le frequentano in tenera età, vi mancano di quelle comodità che giovano al corpo come allo spirito, è urgente il supplire con apposito locale al difetto di spazio che impigrisce e snerva le membra dei bambini stipati a centinaia in aule che per alcuni anni ancora non potranno essere abbandonate⁸⁸.

La proposta venne discussa in Consiglio comunale il 9 maggio 1865 e provocò un dibattito interessante. Esso, a dire il vero, non entrava nel merito dell'opportunità della palestra, da tutti riconosciuta, o dell'ammontare della spesa preventivata, da nessuno contestata; piuttosto si soffermava sul rapporto pubblico-privato negli interventi per la diffusione della ginnastica e più in generale dell'educazione, molto discusso in quel frangente in Italia, anche in visione di una revisione, mai avvenuta di fatto, del modello scolastico presente nella Legge Casati nel senso sia di un decentramento dei poteri a livello locale sia di una maggiore apertura al contributo dell'iniziativa privata⁸⁹. Il

⁸⁶ *Relazione della Commissione civica per gli studi letta nella seduta dell'8 maggio 1865 del Consiglio municipale*, cit., pp. 6-8.

⁸⁷ Su questa antica e prestigiosa istituzione educativa maschile milanese, si veda C. Ravizza, *Il Collegio Calchi Taeggi. Una dimenticata istituzione milanese*, «Archivio Storico Lombardo», 2007, pp. 233-263.

⁸⁸ *Relazione della Commissione civica per gli studi letta nella seduta dell'8 maggio 1865 del Consiglio municipale*, cit., p. 7.

⁸⁹ Sul tema della revisione della Casati, affrontato dagli studi che hanno preso in esame la storia della scuola in Italia nel primo quindicennio postunitario, si vedano ora le recenti, puntuali riflessioni formulate da A. Ascenzi e R. Sani nel volume: «*Un'altra scuola... per un altro paese*». Ottavio Gigli e l'Associazione nazionale per la fondazione di Asili rurali per l'infanzia tra lotta

consigliere Agostino Frapolli, direttore del laboratorio di chimica della Società di Incoraggiamento di Arti e Mestieri, infatti, nel chiedere chiarimenti sulla spesa, precisava che avrebbe preferito che si imitasse Torino anche nella modalità lì adottata, ovvero delegando a un'associazione, o che si facesse come in Inghilterra e in Belgio, dove ci si avvaleva dell'intervento dei privati e si chiedeva un contributo, sia pur tenue, agli allievi⁹⁰. Come si ricorderà, infatti, a Torino la palestra, poi usata anche dagli alunni delle scuole, era stata edificata dalla Società Ginnastica. Tenca, a nome della Commissione per gli studi, osservava che sarebbe stato bello poter contare anche a Milano, come nel capoluogo piemontese, sulla collaborazione di una associazione, che però mancava. Né, a suo giudizio, appariva perseguibile in quel momento da parte del Municipio di Milano, in fatto di pubblica istruzione, il modello dei Paesi stranieri evocati. Insomma si riteneva, da parte dell'amministrazione, che se si voleva far progredire l'istruzione ginnica nelle scuole doveva essere il Comune a farsi carico di quest'onere, anche predisponendo gli appositi spazi. Si noti che Milano appariva in controtendenza nell'Italia dell'epoca; il modello torinese divenne, infatti, la prassi seguita da molte altre realtà, tanto che, è stato notato, senza il concorso dei privati allo Stato, «anche quel poco di ginnastica scolastica che si fece in Italia sul finire dell'Ottocento non avrebbe potuto svolgersi»⁹¹.

La scelta operata dalla municipalità ambrosiana non avveniva in modo sprovveduto. Essa si preoccupò di avviare un'iniziativa che non fosse destinata a fallire o a pesare negativamente sul bilancio comunale. Infatti, allorché la Palestra civica fu inaugurata nel 1867 con sede in Corso di Porta Romana 108⁹², il Comune subito si prodigò per aprirla, a pagamento, alla cittadinanza, alle scuole secondarie governative e private, che dovevano assicurare la ginnastica educativa e le esercitazioni militari ma che mancavano di luoghi attrezzati. Va detto che questa apertura alla società non nasceva solo da una preoccupazione di carattere finanziario; essa era espressione della volontà, decisamente connotata in senso pedagogico, degli uomini che guidavano la città di Milano di accreditare la ginnastica come modalità di impiegare in maniera dilettevole, ma anche costruttiva, il tempo libero. Di qui l'auspicio che la ginnastica entrasse a fare parte dei costumi del popolo al posto dei «rozzi e frivoli passatempi» cui si dedicava finito il lavoro⁹³ e, da subito, la sua estensione agli alunni delle

all'analfabetismo e Nation-building (1866-1873), Macerata, eum, 2014.

⁹⁰ Cfr. *Rapporto e proposte della Commissione civica degli studi*, in *Atti del Municipio di Milano, annata 1865, seduta del 9 maggio 1865*, cit., pp. 259-260.

⁹¹ Ferrara, *L'Italia in palestra*, cit., p. 142 e, più in generale, per le palestre in questa fase pp. 139-144.

⁹² Cfr. *Conto morale della gestione civica*, cit., p. 17. Più tardi, alla fine dell'Ottocento, il Comune di Milano provvide a demolire la Palestra civica per costruire nello stesso edificio una scuola elementare: cfr. Società Ginnastica Milanese Forza e Coraggio, 1870-1970. *Un secolo di storia nel centenario della fondazione*, a cura di B. Viviano, Milano, Galli & Thierri, 1970, p. 14.

⁹³ Oltre il *Conto morale* citato nella nota precedente, si veda anche *Relazione della Commissione degli studi concernente gli anni 1865-1866 e 1866-1867*, cit., pp. 170-171 (il brano

scuole serali. La Palestra, aperta nei giorni festivi per alcune ore, doveva non solo allontanarli dalle osterie o dalle strade, ma anche offrire un'alternativa laica all'azione educativa della Chiesa rivolta ai ragazzi; essa, come emerge dai documenti prodotti dall'amministrazione municipale, espressione in questi anni, come già detto, della cultura moderata che si riconosceva nella Destra storica, si configurava come luogo complementare della scuola nel suo ruolo di formazione dell'identità nazionale e di «rigenerazione delle classi popolari».

Per tale guisa – affermava la Commissione civica nel 1868 – quelle centinaia di giovani, che altrimenti sarebbero abbandonati alle viziate abitudini del volgo o tutt'al più raccolti in quei festivi convegni che lo zelo clericale apre al popolo sotto il nome di oratorii, trovano qui una divagazione geniale che è al tempo stesso un mezzo di miglioramento fisico e morale⁹⁴.

Affidata alla direzione di uno dei maestri che aveva seguito le lezioni di Obermann e che insegnava nelle elementari della città, Carlo Bizzozzero⁹⁵, la Palestra civica di fatto divenne in brevissimo tempo il punto di riferimento e il luogo di aggregazione dei ginnasti milanesi all'indomani dell'Unità. Tra questi spiccavano, come documentano le fonti dell'epoca, anche altri docenti di ginnastica delle scuole primarie, oltre a Bizzozzero, e sicuramente i già ricordati Lomazzi, Ronchi, Zibecchi, nonché alcuni giovani che li seguivano le lezioni di scherma tenute da Pietro Ramella, rinomato maestro di questa disciplina presso il Collegio di San Luca. Proprio a questo gruppo appartenevano coloro che nel marzo del 1870 diedero vita alla Società ginnastica milanese (denominata «Forza e coraggio» dal 1886, dal motto che originariamente si era data) e che nella Palestra civica avrebbe continuato a svolgere le proprie attività fin quasi

citato a p. 171).

⁹⁴ *Relazione della Commissione degli studi concernente gli anni 1865-1866 e 1866-1867*, cit., p. 171. Il saldo legame fra funzione rigeneratrice della ginnastica e progetto educativo dell'Italia liberale, che rinviava ai valori dell'epopea risorgimentale, è messo a tema in molte delle opere sin qui citate. Qui ci si limita a ricordare gli studi che ne hanno trattato in modo più specifico: S. Pivato, *Ginnastica e Risorgimento, alle origini del rapporto sport/nazionalismo*, «Ricerche storiche», vol. 19, n. 2, 1989, pp. 249-279; Id., *Far ginnastica e far nazioni*, in A. Noto, L. Rossi (edd.), *Coroginnica. Saggi sulla ginnastica, lo sport e la cultura del corpo 1861-1991*, Roma, La Meridiana, 1992, pp. 32-43; G. Gori, *La ginnastica, in Patrioti si diventa. Luoghi e linguaggi di pedagogia patriottica nell'Italia unita*, a cura di A. Arisi Rota, M. Ferrari, M. Morandi, Milano, Franco Angeli, 2009, pp. 101-112. Puntuali e sempre attuali le considerazioni di G. Verucci, *L'Italia laica dopo l'Unità 1848-1876*, Roma-Bari, Laterza, 1996, pp. 127-128. Segnalo, per quanto riguarda gli oratori milanesi nella seconda metà dell'Ottocento, il lavoro di P. Alfieri, *Oltre il «recinto». L'educazione popolare negli oratori milanesi tra Otto e Novecento*, Torino, Sei, 2011, che peraltro, a sua volta, documenta molto bene l'apertura al tema dell'educazione del corpo del progetto educativo messo a punto da queste istituzioni agli inizi del Novecento.

⁹⁵ C. Bizzozzero (Rho, 1836-Milano, 1870) prese parte alla Guerra di indipendenza nel 1859 e nel 1860 fu nominato maestro nelle scuole milanesi. Dopo avere studiato presso Obermann a Torino, fu incaricato di tenere gli esercizi ginnici e militari presso il Collegio Calchi Taeggi dal 1862 e poi, come si è detto, presso le civiche scuole elementari. Chiamato a dirigere la palestra comunale nel 1867, egli lasciò l'insegnamento primario per dedicarsi completamente al movimento ginnico: cfr. *Carlo Bizzozzero*, «L'Educatore Italiano», vol. XIV, n. 29, 21 luglio 1870, p. 232.

alla fine dell'Ottocento⁹⁶. Il sodalizio ginnico era il primo a sorgere in città e rappresentò «la cellula embrionale» da cui scaturì «un movimento sportivo modernamente inteso» e che, molto prima dell'affermazione del ciclismo e del calcio, mise a punto «un proprio codice ideologico e un apparato organizzativo consolidati»⁹⁷.

Diversamente da Torino, comunque presa a modello, a Milano il centro catalizzatore e propulsore della ginnastica in città non fu una palestra voluta da una società, ma una palestra eretta dall'autorità municipale come completamento – e questo credo debba essere ancora sottolineato – dello sforzo profuso per diffondere la ginnastica nelle scuole primarie maschili e femminili. In uno studio recente sull'associazionismo ginnico in Italia, con particolare riferimento al Nord Ovest, dove si concentrò il numero più alto di sodalizi fondati nell'ultimo trentennio del XIX secolo, è stato notato che la maggior parte delle società (pari al 41%) sorgeva in Lombardia, seguita dalla Liguria (35%) e infine dal Piemonte (23%). Due fundamentalmente, secondo l'autore della ricerca, le ragioni di questo primato rispetto al Regno di Sardegna, che pure aveva dato i natali alla ginnastica educativa: il radicamento in terra lombarda degli ideali risorgimentali, cui il movimento ginnico era legato, e la «precoce vocazione alla modernità» della città di Milano che «recepì forse meglio di qualunque altra gli impulsi che i nuovi sodalizi avrebbero potuto comunicare nel processo di educazione delle classi sociali italiane»⁹⁸. Sulla base di quanto

⁹⁶ Per queste vicende, che portarono alla fondazione della Società ginnastica milanese, si vedano: Società Ginnastica Milanese Forza e Coraggio, *1870-1970. Un secolo di storia nel centenario della fondazione*, cit., pp. 11-14; F. Colombo, *Forza e coraggio. Patriottici e disciplinati*, «Lancillotto e Nausica», vol. VII, n. 1-2-3, 1990, pp. 68-77; S. Giuntini, *Società ginnastica milanese Forza e Coraggio. «Alle origini dello Sport a Milano»*, Milano, Work Team, [1994]. Gli studi che ne hanno ricostruito le origini concordano nel considerare l'evento genetico del sodalizio milanese la partecipazione di un gruppo di dodici ginnasti, che frequentavano la Palestra civica, alla Festa federale di ginnastica indetta dalla città di Bellinzona nell'agosto del 1868. Tra questi vi erano i quattro maestri elementari ricordati nel testo, Ramella e altri giovani lavoratori (alcuni commessi di studio e un tipografo), nonché E. Baumann, da tutti considerato «il padre» della ginnastica italiana, che in quegli anni era docente di ginnastica nelle scuole secondarie di Bologna e studente di Medicina presso l'Ateneo di quella città. La sua partecipazione alla Festa federale di Bellinzona lascia intuire contatti con i ginnasti milanesi, oltre quelli ampiamente documentati con Torino e il gruppo veneto. Su di lui si veda almeno il recente profilo redatto da A. Magnanini in DBE, Vol. I (A-K), pp. 118-119; nonché, per gli anni a Bologna, M. D'Ascenzo, *Alle origini delle attività sportive nella scuola italiana: la ginnastica «razionale» di Emilio Baumann*, in *Sport e infanzia tra gioco e impegno*, a cura di R. Farné, Milano, Franco Angeli, 2010, pp. 194-215.

⁹⁷ S. Giuntini, *Storia dello sport a Milano*, Milano, Edi. Ermes, 1991, p. 16; sulle caratteristiche dell'associazionismo milanese si veda anche il recente lavoro di D.F.A Elia, *Lo sport in Italia. Dal loisir alla pratica*, Roma, Carocci, 2009, pp. 153-222.

⁹⁸ Elia, *Lo sport in Italia*, cit., p. 170. Ma si veda anche F. Fabrizio, *Storia dello sport in Italia. Dalle società ginnastiche all'associazionismo di massa*, Milano, Guaraldi, 1977, che notava: «L'ambiziosa e dinamica Milano soppianta nel ruolo di capitale del movimento sportivo nazionale la compassata ed aristocratica Torino: un nuovo modello sportivo, proiettato verso il futuro, si affianca a quello tradizionale, ripiegato su se stesso, nell'ostinata fedeltà ai fantasmi di un mondo in dissoluzione, al quale il conflitto mondiale si appresta a dare un colpo di grazia» (pp. 30-31).

siamo venuti dicendo, credo si possa affermare che l'amministrazione comunale non fu estranea al processo delineato e che, fin dall'Unità, essa giocò un ruolo di primo piano nella diffusione della ginnastica educativa nella società civile. Promuovendo le esercitazioni ginniche nelle scuole, nonché istituendo la Palestra civica, essa cioè contribuì al verificarsi in città delle condizioni favorevoli alla nascita dell'associazionismo ginnico.

Conclusioni

La ricerca qui presentata, che peraltro si limita al primo decennio postunitario, ha messo in luce la tempestività e l'attivismo del Comune di Milano nell'introdurre gli esercizi ginnici nelle scuole elementari subito dopo l'Unità, e dunque molto prima della Legge De Sanctis del 1878, nel promuovere la formazione del personale docente, nell'interessarsi dell'educazione ginnica femminile e nel predisporre spazi adeguati (la Palestra civica); tale azione appare in linea con altre realtà locali (e in alcuni casi le anticipa) più studiate dal punto di vista della diffusione della ginnastica educativa, quali Torino, Bologna, Venezia. La prevalente attenzione, da parte della storia della ginnastica in Italia, per l'affermazione e lo scontro fra di loro delle grandi scuole di pensiero nel corso del XIX secolo, ovvero quella di Torino con Obermann e F. Valletti, cui si oppose quella veneto-romagnola di C. Reyer, P. Gallo e E. Baumann, ha lasciato più sullo sfondo le iniziative promosse in questo ambito in altri contesti. Non si tratta ovviamente di volere affermare un primato, che in ogni caso andrebbe comparato con altre realtà in quello stesso periodo, quanto piuttosto di rilevare che gli studi di caso o sui protagonisti⁹⁹ e l'avvio di ricerche che si avvalgano di fonti locali¹⁰⁰ possono offrire un significativo contributo alla ricerca sulla storia dell'insegnamento della ginnastica educativa in Italia, facendo emergere l'eterogeneità dei percorsi (si pensi, ad esempio, al rapporto fra pubblico e privato – ovvero le società ginniche – nella creazione delle palestre) nonché la pluralità delle esperienze che la connotarono.

⁹⁹ Decisamente preziosi, sotto questo profilo, appaiono i profili redatti per il DBE relativi a uomini e donne impegnati nell'ambito dell'educazione fisica e della ginnastica nei secoli XIX e XX.

¹⁰⁰ Si vedano in tale senso le riflessioni formulate nell'Introduzione da Elia, *Lo sport in Italia*, cit.

The schooling process and teacher training in the Italian colonial region of Rio Grande do Sul, Brazil (1910-1940)

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ABSTRACT: The article was produced within the scope of an inter-institutional project and analyses memories of women teachers who worked in the Italian Colonial Region of Rio Grande do Sul, Brazil. The time period we used was 1910 to 1940, which was important from the standpoint of the expansion of the public school system in Brazil. Our theoretical referential were the contributions of Cultural History, and methodologically, Oral History. The documents analysed are interviews that are part of two collections: the Memory Bank of the João Spadari Adami Historical Archive, maintained by the City Administration of Caxias do Sul, and the Interview Collection of the Institute of Historical and Cultural Memory maintained by the University of Caxias do Sul. Twelve interviews were chosen. The memories allow a glimpse of the school process and teacher training, selection and working conditions of the teachers. We concluded that most teachers began their training as lay people, having studied at most until the so-called 5th Book, which means approximately 5 years of school. Throughout their career, some of them took further training courses, others taught themselves. Several of them began teaching very early, on average between the ages of 13 and 15 years. Most of the teachers were recognized and valued, and took on tasks in the community, such as religious education (catechesis). The narratives also allow one to note that until the beginning of the 1940s, in the Italian Colonial Region, there were predominantly multi-grade classes with individual teaching.

EET/TEE KEYWORDS: Female Teachers; Teacher Education; Migrant; Schooling; Brazil; XX Century.

Initial considerations

Access to school, in Brazil became universal in the passage from the 20th to the 21st century. However the everyday of schools was beset by many problems, since the school ‘model’ disseminated may be considered archaic, producing a grammar founded on modernity which has not responded to the appeals of the time in which we live. Debates about possible ways to go, in our opinion, agree with the finding by Nóvoa when he indicates three main tendencies of discussion on education:

First of all, the logics of *privatization*, which are legitimated by principles of liberalization and choice, seeking to consolidate a ‘market of education and training’. Secondly, the dynamics of *deburocratization*, which appeal to the greater responsibility of school institutions, and to regular practices of ‘rendering accounts’ to families and society. Thirdly, the *technologization* routes that often create the illusion that *educação.com* makes it unnecessary to think and try to understand¹.

We think that a critical-analytical attitude founded on the historical look at the school, its subjects, practices, time and spaces for organization can contribute to understanding the process by which the school institution was constituted. Historical research moves in the sense of feeding the debate on teacher training processes and the trajectories of schooling experienced in the present, allowing an escape from the presentism or from nostalgia about the past, avoiding simplism, senselessness and the banalization of positions that incur in blaming one or the other for the difficulties and lack of quality of Brazilian basic education.

Thus, the study performed intends to contribute to rethinking teacher training, based on an investigation about the History of Education. It is the result of an inter-institutional study on cultures and schooling processes, which specifically analyses the school history of the Italian Colonial Region in Rio Grande do Sul, Brazil. This region covers the territory of the three first ‘colonies’ (which were settlements of foreign immigrants, and their subdivisions) demarcated to receive immigrants, predominantly Italians². The colonies of Conde D’Eu and Dona Isabel

¹ A. Nóvoa, *Nota introdutória*, in A. Prost et al., *Espaços de Educação, Tempos de Formação*, Portugal, Fundação Calouste Gulbenkian, 2001, pp. 9-14, in partic. p. 9.

² Throughout this article we called the immigrants from the Italian Peninsula, especially from 1875 on, Italian. However, research has shown that the ethnic identification process of these immigrant groups occurred on Rio Grande do Sul soil, insofar as most of them, in the beginning, saw themselves as belonging to the regions of a unified Italy – namely, in the first few years they said that they were from Vicenza, Milan, Cremona, Belluno and so on. The (self)denomination as Italians began in the confrontation with the difference produced towards the other – Brazilian, black, German, in other words with the other ethnic groups that already inhabited Rio Grande do Sul. About this discussion, consult L.F. Beneduzi (*Mal di paese: as reelaborações de um Vêneto imaginário na ex-colônia de Conde d’Eu (1884-1925)*, Tese de Doutorado em História, Programa de Pós-Graduação em História, UFRGS, Porto Alegre, RS, 2004) and M.C.C. Zanini (*Italianidade no Brasil Meridional: a construção*

were created in 1870 and Caxias in 1875. The occupation of the colonies began in 1875. Currently they are the municipalities of Garibaldi, Bento Gonçalves, Caxias do Sul, Farroupilha, Flores da Cunha, Carlos Barbosa, São Marcos and others, all of them in the Italian Colonial Region of Rio Grande do Sul (RCI).

The document base of the study was obtained in two collections that preserve the memory of people who lived in the Italian Colonial Region. These are not collections exclusively meant to preserve documents concerning the history of education, but among them it is possible to locate transcripts of accounts given based on oral memories. They are narratives concerning the life of the teachers who worked in the colonies. Thus, the main documentary base of this research are the interviews transcribed and deposited in the collection of the Memory Bank of the Joao Spadari Adami Municipal Historical Archive of Caxias do Sul (*Banco de Memória do Arquivo Histórico Municipal João Spadari Adami de Caxias do Sul*) the Collection of Interviews of Instituto Memória Histórica e Cultural of the University of Caxias do Sul. To select the interviews we restricted the search to those that concerned women teachers. After this selection we separated those who had their school experiences during the period from 1910 to 1940, aiming to understand the environment in which they were trained to teach and the school culture of that period, characterized by the expansion of public school.

The interviews selected make up an ensemble of twelve teachers. In summary table 1 we systematically present the subjects of the research, the temporal and geographic universe in which they worked, configuring a biographical overview of the interviews that provide the base of the study.

Summary Table 1. *Biographical reference of the teachers interviewed*

<i>Name</i>	<i>Year and place of birth</i>	<i>Parents</i>	<i>Year began teaching</i>	<i>Places where taught</i>	<i>Location of the schools</i>
Adelaide Rosa	1903, Caxias do Sul	Not recorded	1936	- São Carlos - Colégio Elementar José Bonifácio - Grupo Escolar Pena de Moraes	Urban
Alice Gasperin	1906, Barracão, Bento Gonçalves	Giovanni Gasperin and Ana Dall'Acqua	1920	- Escola Municipal Sertorina - Grupo Escolar Farroupilha.	Rural e urban
Catarina Rosa Piva Foppa	1910, Garibaldi	Vicente Piva and Palmira Corbelini Piva	1929	- 15 de Boa Vista - Coronel Pilar	Rural

Dorotéia Rizzon Corte	1919, São Marcos	Pedro Rizzon and Maria Étvolf Brisolin Rizzon	1932	- Pedras Brancas (Teacher's aide) - Oreste Manfro - General Osório - São Jacó	Rural e Urban
Ester Troian Benvenuto	1916, District of Ana Rech, Caxias do Sul	Francisco Troian and Angelina CorsoTroian	1930	- Santo Anselmo - Ana Rech - Teaching Adviser of the Municipality of Caxias do Sul - And other schools and functions	Rural e urban
Guilhermina Lora Poloni Costa	1911, Caxias do Sul	Pedro Poloni and Paulina Lora Poloni	1932	- Desvio Rizzo - Comunidade Nossa Senhora das Graças - Escola Municipal Catulo da Paixão Cearense - Santa Corona - And others	Rural
Liduvina SirtoliTisott	1912, 3ª Léguas de Caxias do Sul	João Sirtoli and Tereza Favis	Around 1928	- São João - Travessão Tirolês	Rural
Marina Bridi Moretto	1926, São Virgílio da 6ª Léguas de Caxias do Sul.	Daniel Bridi and Fortunata de Gregori Bridi	1940	- Escola Linha Barro Experimental - Tomé de Sousa - Nossa Senhora da Rocca	Rural
Nair Menegotto Pedreira Grandi	1927, Bento Gonçalves	João Becker Pedreira and Anita Menegotto	Around 1943	- Escola São Paulo - Linha Cabur - Zaccani, Borgo Forte	Rural
Olga Ramos Brentano	1917, Porto Alegre	Silvério Ramos de Oliveira and Maria Márcia de Oliveira	1939	- Grupo Escolar Farroupilha - Escola Normal Ângelo Antonello - Escola Normal Duque de Caxias - Others.	Urban
Verônica Candiago Bortolon	1915, Caxias do Sul	Francisco Candiago and Giovanna Ruzzarin Candiago	1930	- In a shed belonging to Mr. Benício Pontalti. - House of Cirilo Ruzzarin, Escola Municipal Nossa Senhora de Lurdes.	Urban
Vitória Luciata Regla	1911, Santo Isidoro, Garibaldi	Ângelo Regla and Maria Cauduro	1925	- Several isolated schools in Garibaldi	Rural

Source: Interviews of Memory Bank of AHMJSA and IMHC/UCS.

As we can see in summary table 1, the interviewees are mostly descendants of Italian families, a total of 83%. Most of them were born in the first and second decade of the 20th century. Of these, 91% were born in the Italian Colonial Region; they worked as teachers in municipal schools in rural areas, and the majority began their career very young, before their 18th birthday.

Observing the projects to institutionalize the memory collections where the interviews were researched, we see that they were produced using the Oral History methodology. Most of the interviews were performed between the 1980s and 1990s, and they were recorded on cassette tapes, based on thematic axes. The recordings were transcribed and the documents we are analysing are transcripts of oral memories.

The interviews present different items of information related to everyday life at school, during immigration, and a few years later. This universe of information told in the memories belonging to the Collections, allows investigating dimensions involved in the history of education, which potentiates this topic and makes it possible to expand the studies. Research such as that of Luchese³ shows that the history of school in the Italian Colonial Region historically congregated the participation of families, consular, ecclesiastic and public authorities, such as the municipal *intendentes* ('mayors') and councillors⁴. These schools can be divided into three modalities: public schools, confessional schools, and the ephemeral ethnic-community schools.

The historical investigation of this topic allows the development of sensitivities and the construction of a necessary lucidity, in the sense that one can broaden the repertory concerning the forms in which the school exists and the different pedagogical methods possible. This allows us a more discerning analysis of the process of schooling and development of education in Brazil, especially in Rio Grande do Sul.

We believe that, as historians of education, we should remember, as Hobsbawm says «what the others forget», and in practicing this profession «understand and explain *why* things turned out as they did, and how they are related to each other»⁵. Thus, the purpose of the present text is to narrate the history of the school and of the training of teachers who worked in the Italian Colonial Region, especially in rural areas, between the years of 1910 and 1940. We sought the theoretical contribution in the Cultural History which

³ T.Á. Luchese, *O Processo entre imigrantes da região Colonial Italiana do RS – 1975 a 1930: leggere, scrivere e calcolare per essere qualcuno nella vita*, Tese de doutorado, São Leopoldo, RS, Universidade do Vale do Rio dos Sinos, 2007 (Programa de Pós-Graduação em Educação).

⁴ Another practice is found in the Region of Campos de Cima da Serra, where municipal authorities built the school and the members of the community hired teachers and maintained the school (see L. Sgarbi Santos Graziottin, *Memórias recompondo tempos e espaços da educação – Bom Jesus/RS (1913-1963)*, Tese de Doutorado em Educação, Porto Alegre, PUC/RS, 2008).

⁵ E. Hobsbawm, *A Era dos Extremos: o breve século XX, 1914-1991*, São Paulo, Companhia das Letras, 1995, p. 13.

marks the reinvention of the past and that, according to Pesavento brought «the individual to the surface as a subject of History, recomposing life stories [...]»⁶, and accentuating, as Chartier⁷ says, the plurality of uses, understanding and interpretation of the practices that are part of everyday school life.

1. *Rio Grande do Sul and Brazilian educational scene in the decades from 1910 to the 1940s*

Throughout the 19th century, during the imperial period, the conditions of education in Brazil and Rio Grande do Sul in particular lacked structure. We must consider that «the devices of modern school machinery, were around, interacting tensely with the multiplicity and inequality of forms of education and instruction that coexisted throughout the 19th century»⁸. Thus, even broadening the debates about the problems of education and holding pedagogical conferences, there were great disparities among the provincial investments and great disputes that generated tensions involving the different projects and initiatives. It was, therefore, only at the end of the 1800s, with the rise of the Republican regime in 1889, that school or a certain form of school, graded school, began to be emphasized.

In order to understand this historical moment, a few documents help analyse the school process to which we have dedicated our studies.

As regards the educational conditions in the Province of Rio Grande do Sul, State President Henrique D'Avilla, in 1881, said emphatically in his report:

Nobody ignores any longer that it is instruction that leads to ethics and proper practice, love of working and all the virtues that make nations happy. That peoples count their progress by the destruction of the barriers of ignorance or by the new elements that the achievements of the spirit offer to the development of civilization. *The backwardness of public instruction is still deplorable; for months I performed a detailed study of what could be done. We do not yet have a system, there is no teaching, there are no schools* It is not only the adoption of good institutions that is the element of progress in cultured countries, *it is above all in the choice for its execution, to give them life, to convert them into reality. [...] The teacher is the active principle and the life of the school*⁹.

⁶ S.J. Pesavento, *História & História Cultural*, 2. ed., Belo Horizonte, Autêntica, 2004, p. 118.

⁷ R. Chartier, *Formas e sentidos, Cultura escrita: entre distinção e apropriação*, Campinas, São Paulo, Mercado das Letras, 2003.

⁸ J. Gonçalves Gondra, A. Shueler, *Educação, poder e sociedade no império brasileiro*, São Paulo, Cortez, 2008, p. 291.

⁹ Relatório apresentado pelo Presidente da Província de São Pedro do Rio Grande do Sul, Henrique D'Avilla, para a Assembleia Provincial, em março de 1881, <<http://brazil.crl.edu/bsd/bsd/u757/000001.html>> (last access: September 2nd, 2013), pp. 23-24. My italics.

For D'Avilla it was essential to invest in instruction of good teachers, considered «the active principle and life of the school». He said that the few teachers there were «in the course subject that they are obliged to teach, there are many who are neither proficient, nor know it well, they do not have the science, they do not have patience, they do not love the profession»¹⁰. He was sceptical, he criticized the lack of investments, considering that the main cause of the helplessness of the provinces regarding instruction was justified because they were responsible exclusively for maintaining primary education: «the progress of public education is, as you know, mainly a matter of money»¹¹.

First of all, conditions in Rio Grande do Sul and in Brazil, at the dawn of the Republic, were not very promising as regards public school. In 1891, the Constitution of the Republic of Brazil instituted a federative government system, decentralizing the teaching system, and delegating to the state the competency of legislating about primary education. In practice, it was the Union that was to legislate on higher and secondary education, and the states were to create and control primary and professional education, the latter at the time referring to Normal Schools for the girls and Technical schools for the boys¹². Thus, a dual system of education was reaffirmed that reflected the portrait of Brazilian society divided into 'the elite' and 'the people'.

Due to the federalization process, as regards the system of education that was in force at that time in the Republic, the Federal Government did not interfere in the actions of the States regarding primary education, resulting in actions, that were often unequal, which ultimately generated a complete disorganization in the construction of the Brazilian school system, or, as Romanelli says, «of the Brazilian educational systems»¹³.

In the case of Rio Grande do Sul, one of the differentials that was reflected in education was the colonization promoted by settling immigrants, mainly Germans, Italians and Polish. The territorial occupation by immigrants produced a differentiated context insofar as small landholdings, polyculture, family work and the progressive expansion of manufacturing allowed a considerable economic diversification. According to Corsetti¹⁴, Rio Grande do Sul, in social terms, presented an early modernization compared to Brazilian society. The appeals to the importance of school made sense among the immigrant communities that, due to the complete lack of public schools, organized and structured their own schools¹⁵. We emphasize that, at the end of the 19th century, there also began to

¹⁰ *Ibid.*, p. 24.

¹¹ *Ibid.*, p. 25.

¹² O. de Oliveira Romanelli, *História da educação no Brasil*, Petrópolis, Rio de Janeiro, Vozes, 2005.

¹³ *Ibid.*, p. 42.

¹⁴ B. Corsetti, *Controle e Ufanismo: a Escola Pública no Rio Grande do Sul*, Tese em Educação, Santa Maria, Universidade Federal de Santa Maria, 1998 (Programa de Pós-Graduação em Educação).

¹⁵ About the ethnic-community schools in Rio Grande do Sul, consult Luchese (*O Processo*

be confessional schools. They were the initiative that resulted from expanding the implementation of religious congregations in the State.

In Rio Grande do Sul the administration of a group of Republicans who were strongly connected to Positivism generated a new look at matters of education, because through school an attempt was made at modernization, even if conservatively. As Didonet¹⁶ said, education began to be seen as a new weapon to prepare and make it possible to restructure Rio Grande do Sul society. The expansion of public elementary education was disseminated quantitatively and qualitatively in Rio Grande do Sul, be it by initiative of the state, the municipalites, the Churches, various associations and even private people. Advocacy of the freedom of education gave the Catholic church the possibility of playing an important role in education, especially in secondary school [where it was practically alone]. On the other hand, State and municipalities made their presence felt in the investment in public elementary school, promoting increasing conditions for schooling.

In 1927, the State had 3785 schools and a total of 201, 788 pupils enrolled¹⁷. Love¹⁸ points out that comparatively the conditions of education in Rio Grande do Sul were better than in the rest of the country:

The rate of literacy (including the age group from 0 to 4 years) rose to 38.8% in 1920, 9% higher than that of the state that came second. São Paulo, and more than 14% higher than the national average of 24.5%. The German and Italian colonists helped place Rio Grande do Sul first. São Leopoldo, the main municipality with a German population had almost 62 % literacy (of all age groups) in 1920, and Caxias do Sul, dominated by Italians, 46%¹⁹.

In 1929, when he was still president of the province of Rio Grande do Sul, Getúlio Vargas presented an interesting statistical summary of the schools, levels of education, enrollment and attendance:

entre imigrantes da região Colonial Italiana do RS – 1975 a 1930, cit.; and T.Â. Luchese, B. Corsetti, *Educação e instrução na Província do Rio Grande do Sul*, in J. Gondra, J. Gonçalves, O. Schneider (edd.), *Educação e instrução nas províncias e na corte imperial (Brasil, 1822-1889)*, Vitória, Ed. UFES, 2011, pp. 453-485) and L. Slomp Giron, *Colônia Italiana e Educação*, «História da Educação ASPHE», vol. 2, n. 4, 1998, pp. 87-106 for the Italian ones. And L. Kreutz. *O professor paroquial: magistério e imigração alemã*. Porto Alegre: Ed. UFRGS, 1991 for the German ones.

¹⁶ Z. Cercal Didonet. *O Positivismo e a Constituição Rio-Grandense de 14 de julho de 1891*, Dissertação em Filosofia, Santa Maria, Universidade Federal de Santa Maria, 1975.

¹⁷ Mensagem enviada à Assembleia dos Representantes do Rio Grande do Sul pelo Presidente Getúlio Vargas na 1ª sessão ordinária da 11ª legislatura em 20 de setembro de 1929, p. 31.

¹⁸ J. Love, *O Rio Grande do Sul como fator de instabilidade na República Velha*, in B. Fausto (ed), *História geral da civilização brasileira: o Brasil republicano I*, São Paulo, Difel, 1985.

¹⁹ *Ibid.*, p. 109.

Summary Table 2. *Schools, enrollment and attendance in Rio Grande do Sul in 1929*

<i>N° of schools</i>	<i>Schools</i>	<i>Enrollment</i>	<i>Attendance</i>
1	Complementary School	782	748
1	Attached elementary school	1,003	862
50	Elementary schools	21,895	17,980
38	Public schools (elementary)	7,540	5,280
355	State schools	17,420	12,880
290	Schools receiving subventions exclusively from the State	10,853	8,952
965	Schools maintained exclusively by the Municipality	34,551	28,591
1,167	School receiving subventions from the state and municipality	40,676	32,992
139	Schools receiving federal subventions	4,611	3,419
672	Private elementary schools that do not receive subventions	46,626	41,424
200	Private elementary schools that receive subventions	9,496	7,818
95	Private secondary schools that do not receive subventions	8,555	7,532
15	Private secondary schools receiving subventions	1,824	1,641
29	Secondary and Professional schools's	3,825	3,321
59	Professional schools	5,557	4,997
16	Schools of higher education	1,523	1,223
Total 4,092	Total	216,746	179,640

Source: Mensagem enviada à Assembleia dos Representantes do Rio Grande do Sul pelo Presidente Getúlio Vargas na 1ª sessão ordinária da 11ª legislatura em 20 de setembro de 1929, p. 31.

Observing the quantitative indicators of the previous summary table, the large number of private schools can be seen – many Catholic or Lutheran, in Rio Grande do Sul, besides the ethnic community ones. Thus, between the years of 1930 and 1940, with the world and national events, the educational policies in Rio Grande do Sul turned strongly to the nationalization of teaching. On the occasion of constructing the ‘Brazilian nation’, there were many repetitive announcements of the need to expand the public schools so that a greater number of children could be taught to learn Portuguese and ‘love of country’. To begin with, closing the ethnic schools, teaching in Portuguese, dissemination of the subject of civics at public schools were the policies that markedly reverberated in several decrees, all of them according to the Capanema reforms. The investment in expanding the public education system was accompanied by administrative centralization. It is in this period that the first Career Plan for Elementary School teachers (Decree nr. 1640 of December 29, 1938) was regulated and approved, and from then on teachers began to be employed after passing a competitive exam.

Among the characteristics observed in the first decades of the Republic, focusing attention on 1910 to 1940, the process of developing the system of education in Brazil took on different directions. Between the years of 1910 and 1940, education in Brazil already established the right of education for all, determining free education at the elementary level. However, problems involving education in the process of implementing schools are not only quantitative, represented by the small number of schools, nor by the low results of learning among the students, but social, characterized by a discriminatory system of education that made access to schools difficult, and structural, represented by a system of education that did not correspond to the new needs created by economic expansion and social stratification²⁰.

2. *Schooling and teacher training in the Italian Colonial Region*

In the Italian Colonial Region (ICR), as pointed out by Luchese²¹, the initiatives of different social groups made it possible to have an organized school process in rural and urban ethnic community schools, confessional schools and public schools, both municipal and state-owned. These initiatives, and above all the policies of subventions as a practice disseminated by the Rio Grande do Sul Government, configured a strategy of dissemination of Portuguese-language education in the colonial areas.

At the end of the decade of 1910, there was greater need for schooling because of intensified urbanization, industrial and commercial growth of the ICR and population growth. The scarce offer of education clashed with the growing demand for schooling and the middle strata of the population pressured the public authorities to expand the school system.

Considering the cultural plurality²² of the country, and particularly of Rio Grande do Sul, as well as the scene that has already been sketched previously as regards schooling and teacher training, we ask: Who were the teachers who worked in the ICR? How were they trained? How were they chosen? What were the needs and demands of a region where most of the population consisted

²⁰ Romanelli, *História da Educação no Brasil*, cit.

²¹ Luchese, *O processo escolar entre imigrantes italianos na Região Colonial Italiana, RS*, cit.

²² The reference to «cultural plurality» is connected to a meaning that does not include everything, because, according to Chartier, describing a culture in the sense of «understanding the totality of the relations that are interwoven in it, the set of practices that express the representation of the world, of the social, or of the holy [...] is an impossible task» (R. Chartier, *Leituras e leitores na França do Antigo Regime*, São Paulo, Ed. UNESP, 2004, p. 18). The objective, therefore, is to indicate both common aspects of culture in the ICR) as specificities of these municipalities belonging to the ICR and to understand the interweaving that constitutes education in a specific geographic milieu, with its characteristics.

of immigrants who, even in the 1930s, did not know Portuguese well? This situation was worse in the rural areas. Thinking about schooling and teacher training in the ICR enables us to understand, from the memorialist narratives, these contexts, their limits and the possibilities of implementing a school in the Region. In this sense, the analysis of the memories of twelve teachers in the ICR between 1910 and the 1940s enables one to see History of Education from the dimension of what has been experienced and not what is legal, constituting what Certeau calls tactics, understood as everyday practices which «do not [...] present the possibility of giving themselves a global project nor totalizing [...] a distinct, visible and objectable space»²³. The teachers and even the municipal administration levels are clever and re-appropriate and subvert the strategies²⁴ imposed under the form of regulations, laws and decrees at the national and state level. Hence, from this Story, which comes from a collection of memories, and is thus composed of remembering and forgetting, emerges a space recreated for us to think about schooling and teachers training.

Veiga, referring to the history of teacher training, considers that it «has revealed a historical tendency of inferiority in the hierarchy of professions»²⁵. He postulated that this can be perceived by observing

different names to mean the activity of teaching (scribes, masters, pedagogues, slaves, preceptors, teachers); much historical fluctuation between recognizing prestige or contempt regarding the work of teaching; long duration of physical violence for the pedagogical procedures; social process that is tense in disputes for knowledge; variations in generational relations and therefore in power relations and authority between adults and children or young people. In this way, organization of the teaching activity as a new profession, or even with a public function, is a deployment of these tensions into a broad network of interdependences²⁶.

Comprehension of the history of education in the ICR is potentiated by perceiving the network of interdependences, as Veiga says, the everyday tactics, as Certeau says²⁷ and the remembering/forgetting narrated in the memories of ICR teachers.

Discussing the beginning of her schooling, Alice Gasperin told that her mother bought her a small pair of clogs, and that she had gone to the Italian

²³ M. De Certeau, *A Escrita da História*, Rio de Janeiro, Forense Universitária, 1994, p. 100.

²⁴ Seen from Michel de Certeau's perspective as «a place that can provide a base to a person and therefore able to provide a base to the management of the person's relations to different» (*Ibid.*, p. 46).

²⁵ C.G. Veiga, *História da Profissão Docente: o problema da autoridade (Brasil, séculos XVIII-XX)*, in *36ª Reunião Nacional da ANPED*, Goiânia, UFG, 2013, pp. 1-13, <http://36reuniao.anped.org.br/pdfs_trabalhos_aprovados/gt02_trabalhos_pdfs/gt02_3010_texto.pdf> (last access: October 8th, 2013).

²⁶ Veiga, *História da Profissão Docente: o problema da autoridade (Brasil, séculos XVIII-XX)*, cit., p. 3.

²⁷ *Ibid.*, cit.; Certeau, *A Escrita da História*, cit.

Consulate in Bento Gonçalves and they had given her a book. This first book, remembered after more than eight decades, had a profound effect on Alice, who described it thus: «I started reading my little book. It was pretty. The colored cover showed a boy running, carrying a kite, just running. And I can still remember. He had ankle boots and his name was Carlino... Italian. The school was Italian»²⁸. Her first school was an Italian ethnic-community school, which she describes:

In 1913, at the beginning of the school year, five months after my daddy died, I began to attend school. I was only six years old. In those days, perhaps because the students missed so much since they had to work on the farm, teaching was individual. Each student did according to their attendance. A lot depended also on each one's will to learn, or on the incentive and interest of the parents. The school was near our house, on our land. Mommy bought me a small pair of clogs. The teacher was an Italian lady called a Camila Roncaronni. [...] She came to the Italian colony of Caxias and introduced herself at the Town Hall as a teacher. They sent her to Sertorina because there was an unfilled position there. The building of the Sertorina school also had a place for the teacher to live. There was a classroom, a room, a small anteroom and around the back an extension the length of the building. At the end of the extension, another little room. A bit further away from the building, a small kitchen with a packed earth fireplace. She taught in Italian. [...] The 'maestrona' only spoke Italian. The book were all Italian. I didn't even find it strange, because I didn't know that there were other languages. I knew that we were Italian, because that is what the parents said at home. I only attended the 'maestrona's' school for a short time. I didn't learn a thing²⁹.

Continuing her story she makes it clear how important a teacher is, since the «maestrona» had been replaced by a woman teacher who talked and taught Portuguese, from whom 'she really learned'. In her memories, Alice indicates interesting issues such as the problem of attendance, of the lack/absence of training among many of the teachers, teaching in Italian, probably the Veneto dialect was spoken³⁰ and the books were in grammatical Italian, the responsibility taken on by each student for their own learning, the teacher living in the communities. In her memories, she says that «noisy children came and went from the school that was near our house, practically within our property.

²⁸ A. Gasperin. Entrevista realizada em 1996, por Sônia Storchi Fries e Susana Grigoletto. Transcrita por Sônia Storchi Fries. FG 195. Banco de Memória do Arquivo Histórico João Spadari Adami, Caxias do Sul.

²⁹ A. Gasperin, *Vão Simbora: relato de imigrantes italianos da Colônia Princesa Dona Isabel do Rio Grande do Sul*, Porto Alegre-Caxias do Sul, EST-EDUCS, 1984, p. 113 and 116.

³⁰ Actually, the diversity of original dialects with Veneto, Lombardo, Trentino dialects and others- remained, in the rural areas until well after the mid-20th century (see V.M. Frosi, C. Mioranza, *Imigração italiana no nordeste do Rio Grande do Sul: processos de formação e evolução de uma comunidade ítalo-brasileira*, Caxias do Sul, EDUCS, 1983). According to the authors a *coine* in which Veneto predominated was created, a supradialect, to make interdialect contacts easier (Frosi, Mioranza, *Imigração Italiana no nordeste do Rio Grande do Sul*, cit., pp. 112-114).

Everywhere, movement and joyfulness»³¹. She told about the replacement of the «maestrona»:

Some time later another teacher came. A young girl, distinguished-looking. At the school she spoke and taught in Portuguese. I really liked going to school. I immediately started learning. I got ahead of Azelina [her older sister] and received the second book before she did. Teaching was individual as to reading. We did dictation and figures together. I did well with reckoning, I learned the multiplication table easily, I prepared my homework to the letter. The teacher's name was Epiphania Loss, nicknamed Fany. She was a very good teacher. She fulfilled her mission, although she was not well trained for it. What she knew, she taught³².

Alice, evaluating the information that was worked on in the classroom, remembered that:

The teacher did not know much. In those days it was enough for the children to learn how to read and write, that is calligraphy and dictation, and do the four operations with integer numbers. She had good will. She told us memorize everything, without explaining anything. Geography we knew well. We had that of Souza Lobo, with maps of Brazil and Rio Grande do Sul, besides an atlas of the other continents. [...] She told us to memorize and also find everything on the maps. We used a History of Brazil with questions and answers. I knew more than half the history, all learned by heart. I could answer any question according to the book. Sciences, never heard of them. Grammar, we used that of Clemente Pinto. I knew nouns, singular, plural, gender, adjectives, regular and auxiliary verbs, *ser* and *estar* (both of them the verb to be in English) and that was all. [...] We never wrote a composition, nor did we write sentences. [...] Dictation, fine and good. I had a certain amount of practice of writing letters, because mother wrote and received letters from her relatives who lived far away. We also read them. I found arithmetic easy. I was quick at the multiplication table. I knew how to reckon the four operations with integer numbers, with the respective tests. But I learned even more from mommy, than from the teacher³³.

Teaching was individual, based on memorizing, emphasizing what was believed to be essential: reading, the main notions of arithmetic and writing. In addition to some notions of history and geography, notions of civics were also learned. Among the schoolbooks, Alice, the teacher, also remembered using the book by Hilário Ribeiro, in the second year. She also said that teacher Fani was very strict and recalled that «I was afraid of the teacher, very afraid. She was pretty, well dressed»³⁴.

Another teacher, Liduvina Sirtoli Tisott, began studying at the age of 10 years, around 1922. In that case, the school was held inside a church in São João Evangelista, at 4^a Léguas, in Galópolis, Caxias do Sul. She told that it was

³¹ A. Gasperin, *Farrroupilha: ex-colônia particular Sertorina*, Caxias do Sul, Ed. do Autor, 1989, p. 26.

³² Gasperin, *Vão Simbora: relato de imigrantes italianos da Colônia Princesa Dona Isabel do Rio Grande do Sul*, cit., p. 117.

³³ *Ibid.*, p. 123 and 124.

³⁴ Gasperin, Entrevista realizada em 1996, cit.

a municipal school, and that the teacher was a man called João de Laranjeira, from Porto Alegre. As she told it, this teacher had ben transferred, and he did not stay long.

But he did not stay long. He didn't like it. [...] He didn't like it because he had to walk 4 kilometres, and had two classes [...] he was very old, he walked. [...] They did not like people who came from outside (the local inhabitants.[...] lots of them (the students) were rather big already (she refers to the students) because they did not have a class before, so they were there a long time without classes[...] sometimes it was a whole year. No teacher would come, then the next year one would come, but would only stay a short while. It was always like that³⁵.

The working conditions, the distances to be travelled and the cultural differences, among other aspects, led to an intense circularity among the teachers. It was common to see schools closed because of the absence of teachers. As to the practice of sending all the children to school, Liduvina says: «they sent them for a while, then they'd keep them at home to produce more on the farm, and things like that [...]. They only wanted them to learn to read and write and reckon, that is all. They don't need anything else, they always said»³⁶. In several report we find the recurrence of the understanding that school was considered important, necessary, required by the family, but the aims were pragmatic – teaching reading, writing and the four basic operations.

Liduvina recalls also that in her education she managed to get to the «Seleta» (*A collection of selected texts*). And she says: «I learned a lot because I wanted to know. You know, one began in the 1st book 2nd, 3rd, and went up the the Seleta manuscript»³⁷. The Seleta manuscript was used by the students who were in the 5th year.

As a teacher Liduvina began her career when she was 15, after having been at school for five years. She was appointed by the Intendente of Caxias, who was then the Italian engineer Celeste Gobato. The teacher selection process, she said, consisted of an initial exam, but she was only allowed to teach 'provisionally', because she had not reached the minimum age of 18 years. Alice Gasperin began her teaching career at the age of only 13 years. Likewise, several other interviewees. Liduvina told that she worked in rural municipal schools of Caxias and that, living in the farmer's home, besides the basics she prioritized teaching the catechism.

Another teacher interviewed, Catarina Foppa began her studies in Garibaldi learning the catechism, around 1917, around the age of 7, from a teacher who taught at the São José Sisters School. As she told it, in Garibaldi there were

³⁵ L. Sirtoli Tisott. Entrevistada em 27/08/1987 pela professora Liane Beatriz Moretto. Entrevista transcrita por Tranquila Brambina Moresco Brando. Acervo do Instituto Memória Histórica e Cultural, Universidade de Caxias do Sul.

³⁶ *Ibid.*

³⁷ *Ibid.*

municipal and private schools – one of them belonging to the Sisters of São Jose and the other to the Marist Brothers. She says that «the sisters did not take many students, they preferred to take only those who were from rich families, only from people who had money, who could pay the school well. Then came the Marists [...] the nuns for the girls and the Marist school was only for boys»³⁸. The indications are that she attended school for about seven years, took the public exam and continued the training courses offered by the Garibaldi town administration. She remembered that «I then took an exam, they told me to write a compositions, then they asked a few questions, also about grammar, and then they told me to reckon a few things, and that was that»³⁹. According to her at the time there was a sort of teacher training, and it was held once a year by the woman who was the guidance counsellor. She recalls that:

The guidance counsellor was Naides Bordini, she lived in Porto Alegre. She held meetings of all the teachers together, This was once or twice a year, she then explained everything about how one had to do things at school, how to treat the students, how everything had to be done. She explained everything properly, because there were teachers who hit the students a lot, and they did not want these... even in those days. [...] the inspector... Salvador Bordini and Naides the counselor, did not find this method right, they always wanted us to deal with the students with words [...]⁴⁰.

Her experience as a teacher was in a rural area, in the community of Boa Vista. She lived with one of the families, because she did not want to live alone in 'class'. A short time later she was transferred to teach at the Coronel Pilar School, and there too she lived with a family from the community.

Teacher Veronica Bortolon remembers that she began her studies at the age of seven and that she made quick progress and was successful at school. In her words:

at eight I was already in the second book, and just went on, [...] the school was state-owned, it was called the Escola do Burgo, and only went up to the 3rd [...] the teacher was not specialized, then the school closed. I went on at school until the 4th and 5th year [...]. Later on I finished school at the José Bonifácio elementary school, there things were different. There were all those books. [...] I did not manage to attend Normal School⁴¹. In my time there was no Normal school⁴².

³⁸ C. Foppa. Entrevistada em 1988 pela professora Liane Beatriz Moretto. Entrevista transcrita por Tranquila Brambina Moresco Brando. Acervo do Instituto Memória Histórica e Cultural, Universidade de Caxias do Sul.

³⁹ *Ibid.*

⁴⁰ *Ibid.*

⁴¹ Normal was the name of the course that trained teachers.

⁴² V. Candiago Bortolon. Entrevistada em 1985 pela professora Liane Beatriz Moretto. Entrevista transcrita por Tranquila Brambina Moresco Brando. Acervo do Instituto Memória Histórica e Cultural, Universidade de Caxias do Sul.

The important aspect that Veronica shows about her education is that she attended the elementary school, which was founded in Caxias do Sul, and opened in 1912. Elementary schools were organized differently from isolated classes. They were the model of the ‘modern pedagogy’ of the end of the 19th century, with grades, a specific teacher for each class, spaces for the principal, office, and others⁴³. Veronica’s teaching career began in 1930 as a private teacher, in a shed belonging to Bonifácio Pontalti. The motivations for teaching involved the possibility of earning, she tells that:

at the age of fourteen I needed to buy myself clothes, help my mother to dress my siblings. So my uncle Cirilo Ruzzarin and Mr. Benício Pontalti who were always our friends said: it would be good if Veronica came to our house to teach our children. We will pay her something so that she can help her mother. Cirilo Ruzzarin said: she can go over to my house, because I have a large room on top of the winery. We made benches and she can begin her life there. So I went there, I lived at my Uncle’s, and he paid me 20 thousand reis a month to teach his children, then they found the Bozzi, the Pezzi, other people [...]⁴⁴.

After this period, she took the exam to become a municipal teacher. She said that circular notices were issued so that the teachers could prepare for the exam. In this way «those who were outstanding, who managed to do well in the exams [...], stayed on. Who did badly was obliged to study a bit more»⁴⁵. During the teaching period, the Town Administration held courses «for several years. Then Dante Marcucci did away with them, saying that it was nonsense. Later Ester Troian came and she was very dedicated to the teachers. We had the courses, but it was nothing mandatory with exams, it was another kind of preparation»⁴⁶.

Another teacher who was interviewed, Dorotéia Rizzon Corte, tells that she started school at five and a half, in 1925. At school the teacher taught in Italian «because nobody could understand»⁴⁷. She explains that they spoke Italian at home and also in school. «Then, after we adapted slowly, the teacher explained and we would...»⁴⁸. She remarks that she thought it important to speak Portuguese, they would come home ‘happy’ about the new words they

⁴³ For furtherin formation see Luchese (*O Processo entre imigrantes da região Colonial Italiana do RS – 1975 a 1930*, cit.), and T.Â. Luchese, R. Bergozza. *História da “Duque” a partir de seus impressos*, in E.A.C. Tambara, B. Corsetti (edd.), *Instituições formadoras de professores no Rio Grande do Sul*, Pelotas, Ed. UFPel, 2009, pp. 145-175.

⁴⁴ *Ibid.*

⁴⁵ *Ibid.*

⁴⁶ *Ibid.*

⁴⁷ D. Corte. Entrevistada em 1986 pela professora Liane Beatriz Moretto. Entrevista transcrita por Tranquila Brambina Moresco Brando. Acervo do Instituto Memória Histórica e Cultural, Universidade de Caxias do Sul.

⁴⁸ *Ibid.*

were learning. «My mother liked it, but my father didn't care, he'd say: *Si, sivalá, tanto fa parlar in italian come em brasilian*»⁴⁹.

Teacher Dorotéia also used the Seleta to study, and she attended school for five years. In 1932 she began her career teaching at a private school, as an aide, she was thirteen years old at the time. The next year she took the competitive exam and was appointed by mayor Miguel Muratori, but she was not able to take up the post because she was only 15 years old and the minimum age was 18. It should be noted that in previous situations, age did not prevent them from taking up the teaching job. When she told about the exam she took, Dorotéia said that she wrote a composition and a dictation. She continued her professional studies and graduated from the Normal school:

You did that, and took the exams. If you achieved the average, well and good, you went on. There were the mimeographed materials, and one studied and took the exams at the end of the year. It was Ester Benvenuti who gave me all that, she sent the materials by the mail, it was José Zucco who delivered them. They went to Flores da Cunha, from Flores da Cunha he would take them on horseback to São Marcos, to the sub-town hall and there I picked it them up⁵⁰.

There was continued training, and she told that she took courses offered by the town administration for twelve years. In the teachers' memoirs analysed, the prevailing aspect is the beginning of the teaching career as lay people and continuous on-the-job education job. Several emphasized their experience of participating in update courses offered by the Town administrations and that attending them, in several cases, led to a raise. According to Dorotéia:

we'd come to Caxias during the holidays and during the year the mayor or school inspector would come to the place where we were and gather the teachers, and then they would teach a course. [...] Even when I began to give out punishments, I would tell them to write those lines, 50 lines, 100 lines, that was my punishment. Bu then I read a pedagogy book, I can't remember who wrote it, I know that it said that instead of stimulating the child it would delay them, because many children pick up two or three pencils and it was worthless. In fact I began to observe that it was nothing to the child, it was no use⁵¹.

As Dorotéia explains, these courses were called «aperfeiçoamento», or 'further training courses' and «they called us for improvement, to learn a bit more, because in those days, most of the teachers were very young girls»⁵².

In the case of teacher Adelaide Rosa, we have a different but not unusual situation. She tells that she learned reading and writing at home from her mother and grandmother. She began school in Caxias at the age of seven,

⁴⁹ «Yes, yes, forget it, it is all the same speaking in Italian or in Portuguese» (our translation). *Ibid.*

⁵⁰ *Ibid.*

⁵¹ *Ibid.*

⁵² *Ibid.*

already literate, and she continued here education to begin teaching in 1936, having completed the complementary course. Of her history of education and schooling, she tells:

When I came to Caxias [...] I wanted to attend the class of Joaquina Neves, she was a state teacher who had a isolated class, [...] there she had all class levels. [...] Then I went to the José Bonifácio Elementary School, I stayed there for six months [...] then I went to the nun's school, the São José. It was the only one there was at the time. I began at São José in 1014, then I went to the Antonieta Saldanha until 1918 [...] from 1918 until 1932 I no longer studied, because there was no school here. In 1932 I went to the Complementary [...] it was the only one here in Caxias. I graduated in 1936. I went with my diploma and was appointed by the State. First I taught 10 months at the São Carlos nun school, in Bento Gonçalves. When I left Bento I already came with a request for an appointment [...] ⁵³.

Adelaide's history is different from the others also as to teaching, since in most cases the teachers who took up the position were lay people, and sought their training during their teaching career, either by attending the Complementary Course or the Normal School, which gave a formal license for teaching, or in further training courses.

In the case of teacher Marina Moretto, she attended the school at São Virgílio, in the countryside of Caxias do Sul, from 1933 on, when she was seven years old. The indications collected from her story point to a municipal school where «the teachers were paid by the municipality, but the school itself belonged to the community» ⁵⁴. She studied there up to the 5th year, with large classes of 40, 45 up to 50 students. As to the school materials and how the school worked, Marina remembers that

The book we used was the *Seleta*, until the 5th year. Then one finished elementary school, and then one used the *Seleta*, and the child could stay one year, two, three, as long as it wanted in the classroom [...] our arithmetic book was that of Souza Lobo. The children tried to decipher those problems of Souza Lobo and continued to study ⁵⁵.

Her experience as a teacher began in 1940, at a parish school ⁵⁶ where the teachers were paid by the town administration. She recalls that the school was attended by the children of German immigrants, and that the family with whom she lived were Italians like she was. She had difficulties due to the differences,

⁵³ A. Rosa. Entrevistada em 1984 pela professora Liane Beatriz Moretto. Entrevista transcrita por Tranquila Brambina Moresco Brando. Acervo do Instituto Memória Histórica e Cultural, Universidade de Caxias do Sul.

⁵⁴ M. Bridi Moretto. Entrevistada em 1986 pela professora Liane Beatriz Moretto. Entrevista transcrita por Tranquila Brambina Moresco Brando. Acervo do Instituto Memória Histórica e Cultural, Universidade de Caxias do Sul.

⁵⁵ *Ibid.*

⁵⁶ Parish school or parochial school were school spaces established by intervention of the Catholic Church that instituted a school inside the Church itself, or in a newby house. There are cases in the ICR, of parish schools, especially in Caxias do Sul.

especially regarding the language. In the classroom most «only spoke in German. I could not understand anything, and they could not understand me. So, at the time I only taught them the multiplication table, reading and writing. It was impossible to do anything else»⁵⁷. She stayed at this school for one year and was transferred in April of 1941.

Nair Grandi began to attend school at the age of six, and did up to the fifth year at a Grupo Escolar ('public elementary school'). She took the *exame de admissao* ('high school entrance exam') and attended the Complementary course in Vacaria, but did not finish it. She studied up to the age of sixteen. Even so, she took the competitive exam to begin a teaching career and did outstandingly well. She says «when I took that exam in which I was placed first, they allowed me to choose, and I went to teach at Linha Gumercindo, the school was São Paulo»⁵⁸. Later she also took further training courses.

Guilhermina began to teach in March 1932, after taking the exam. She tells that the exam was «written and oral. [...] I took this exam in December and on March 1 I was already appointed teacher. When Colonel Muratore was mayor [...]»⁵⁹. The teacher remembered that already in those days there were more women who took the exam to obtain a teaching job, according to her there were more jobs than candidates and it was enough to finish elementary school to be able to compete for a place.

When she was asked about her choice to become a teacher, Guilhermina said that she had always wanted to study, to become teacher, since childhood. She loved reading, and when she was a child she picked up and read every paper that she found. She very much liked reading, she repeated. Guilhermina also told: «But my father wouldn't let me study. [...] he said that teachers died old maids and poor. At the time, female teachers, married female teachers were rare; almost all were single»⁶⁰. She says that her first teacher, Vitória Grossi, played a decisive role for her to become a teacher. She believed that Guilhermina had 'an aptitude' to teach. At a given time the teacher, Vitória, went to visit Guilhermina's parents and on that occasion she convinced the father, mainly, and he gave her permission to begin working⁶¹.

Olga Ramos Brentano was born on June 19, 1917 in Porto Alegre. Her parents were Maria Márcia de Oliveira and Silvério Ramos de Oliveira. When asked about the reasons she became a teacher, she said:

⁵⁷ Bridi Moretto. Entrevistada em 1986, cit.

⁵⁸ N. Grandi. Menegotto Pedreira. Entrevistada em 1988 pela professora Corina Michelon Dotti. Entrevista transcrita por Tranquila Brambina Moresco Brando. Acervo do Instituto Memória Histórica e Cultural, Universidade de Caxias do Sul.

⁵⁹ G.L. Poloni Costa. Entrevistada em 1991, por Susana Storchi Grigoletto. Acervo do Banco de Memória do Arquivo Histórico Municipal João Spadari Adami, Caxias do Sul, RS, Brasil.

⁶⁰ *Ibid.*

⁶¹ *Ibid.*

I chose to do so, and still choose to do so, I think that I was born a teacher. And liking it, I like it, even today, I like teaching. I feel very well doing this. I think that it is valuable work, I feel valued when I teach. [...] I began when I was young, very young, all always worked with a great will, with a lot of enthusiasm⁶².

In Olga's case, the choice of profession involved family matters, since her father, Silvério Ramos de Oliveira was also a teacher. According to Olga he was «enthusiastic about education»⁶³. She recalled that her father was a very cultured person, who deeply influenced her and advised her to remain calm, and not raise her voice to the students, but to be close to them. Olga began to teach in 1939, when she was 22 years old.

Finally, we analyse the narrative of teacher Ester Troian Benvenuti. Ester was a municipal teacher, guidance counsellor and the first woman to become a city councillor in Caxias do Sul. The way she became a teacher is very interesting, if one thinks of the presence of women, the family and tactics to achieve certain situations. She tells that her Grandmother was responsible for her having become a teacher:

my grandmother, looking at me, said: Today we are going to the Town administration (*Intendencia*), and you are coming along, to teach those little peasant children (*coloninhos*) to read and write. And that is what happened. She dressed me in pink silk stockings, those very thick ones worn in those days. She put my hair up, she gave me an umbrella with silk fringes and said to me: only answer what they ask you, the rest leave up to me. We were received by the then Municipal Intendente Thomas Beltrão de Queiróz. He looked at me a bit suspiciously and asked: Do you know how to read? Yes. Do you know how to draft a letter? Yes. Do you know how to solve the 4 arithmetical problems? Yes. But it must be arithmetic. Yes. But it must be that of Souza Logo. That is it, yes, Souza Lobo arithmetic. Right, I answered, and I also know the entire Seleta in Prose and Verse. I attended the Elementary School. He asked my grandmother: is this girl old enough to take on this responsibility? And my grandmother quickly answered, yes, she is, she is, she is. Except that I was only 13 years old at the time⁶⁴.

At the age of thirteen, Ester began teaching a class. And the young teacher already perceived among the parents of her students, a great interest in school, on the contrary of what many thought about the farmers – that they saw school as a rather useless activity. The latter was not confirmed by her experience.

⁶² Brentano, O. Ramos. Entrevistada em 1991 por Gilmar Marcílio e Janete Zucolotto. Acervo do Banco de Memória do Arquivo Histórico Municipal João Spadari Adami, Caxias do Sul, RS, Brasil.

⁶³ *Ibid.*

⁶⁴ E. Troian Benvenuti. Entrevistada em 1983 pelos professores Juventino Dal Bó e Liliana Alberti Henrichs. Entrevista transcrita por Sônia Fries Storchi. FG004 e 005. Acervo do Banco de Memória do Arquivo Histórico Municipal João Spadari Adami, Caxias do Sul.

I always noticed what great interest there was, a lot of interest in those days; and also this business of saying that the farmers did not care whether their children attended school, at least in the region where I worked, and from my experience, I say the contrary. [...] I always noticed a great interest among the farmers for their children to study⁶⁵.

Ester tells that the teachers had to be creative, to make up for the gaps in their teacher training (practically nil) and energetic, to focus the attention of large classes, with different levels of knowledge.

Vitória Regla began to attend school at the age of 11, at Santo Isidoro, Linha 19, in the municipality of Garibaldi. It was a municipal class and she tells that the teacher, Leticia Sgaria came riding horseback. She studied for a few years and began teaching in 1925, because there were simply no teachers. Since she had only a few years of schooling, she taught in the morning and in the afternoon she took lessons from a teacher, Jacinto Silva, in Carlos Barbosa. She worked for 42 years and said that in the community, a teacher was «very important. They were highly respected. They were respected as a local authority»⁶⁶. The value ascribed to teachers is mentioned in most utterances of the teachers interviewed, and this is in consonance, and as Luchese says:

The great majority of the first teachers in the Italian Colonial Region did not have any pedagogical training. Many of those who worked [...] only had attended primary school. However, the majority were the people with the highest schooling in the community and this condition, together with the fact of being ‘*mestres*’, schoolteachers, generated prestige, respect and community leadership. In the social milieu in which they lived many teachers took on the central role in religious matters, claims and organization, becoming representatives of that group, when not local leaders. These were the representations produced about being a teacher⁶⁷.

In the teachers’ memoirs a few aspects can be noted that circumscribed education in the ICR, from the time each of them began schooling, in the first decades of the 20th century, until the training obtained to practice teaching as a profession. In this context, characteristics common to most of the narratives make it possible to think about their schooling and training process.

⁶⁵ *Ibid.*

⁶⁶ V. Regla. Entrevistada em 1987 pela professora Liane Beatriz Moretto. Entrevista transcrita por Tranquila Brambina Moresco Brando. Acervo do Instituto Memória Histórica e Cultural, Universidade de Caxias do Sul.

⁶⁷ Luchese, *O processo escolar entre imigrantes italianos da Região Colonial Italiana, RS*, cit, p. 392.

Final considerations

The teachers' memories reveal the role of the community in constituting and instituting the teaching profession. Lay teachers, some of them with few years of schooling, who, because of their connection to the community space, because of need or opportunities became teachers. Women who, in the course of their career found a place in the further training courses, in the teacher training schools or self taught, built complementary possibilities of becoming professionals. In this study we find different teaching experiences connected to the community space, with a social sense enhanced by this space that gave teachers a place as catechists, counsellors, community leaders, among so many other roles they played. As Fernandes⁶⁸ reminds us, in a way many of these teachers were missionaries or this was expected of them, capable of sacrificing or abandoning personal and even professional ambitions to think of themselves in a transcendental destiny. They carried out «one of the traditional functions of the teacher, that which configured them as a spiritual agent, as a teacher and as a social guidance counsellor, as being a model personality within the community»⁶⁹. Also, Sacristán considers that throughout the historical process, the concept of being a teacher was gradually changed and overloaded with demands

That is why their role is a mixture of guardian and custodian of the safety of the minors, of caregiver and guide as a tutor, a person who has an affective relationship with the students, someone who disciplines behaviour, a moralizer for minors, a person who knows the culture that the parents do not possess and the instructor of the small ones, etc. A figure is created that accumulates complex missions to be accomplished – some clearer and others more ambiguous, contradictory at time – which are mixed into the relationship with the students⁷⁰.

As to teacher training, the testimonies show a universe that, because of the need for schooling, led to the situation in which teaching was done by teachers without the least training. They were lay people, they had studied up to the so-called 5th book, i.e., they had studied at most for 5 years. The competitive exams to enter the teaching career consisted basically of writing a composition, dictation and reckoning involving the 4 basic operations. Throughout their career they attended further training courses, many of them showing self-education. Several of them began their teaching career at a very young age, on the average between 13 and 15. The narratives also show that up to the

⁶⁸ R. Fernandes, *Ofício de professor: o fim e o começo dos paradigmas*, In C. Pereira de Sousa, D.B. Catani (edd.), *Práticas educativas, culturas escolares e profissão docente*, São Paulo, Escrituras, 1998, pp. 1-20.

⁶⁹ *Ibid.*, p. 3.

⁷⁰ J.G. Sacristán, *O aluno como invenção*, Porto Alegre, Artmed, 2005, p. 138.

beginning of the 1940s, in the Italian Colonial Region, multi-grade classes with individual teaching predominated in the rural areas.

The practice of living with relatives or members of the community was usual. A few tactics, understood in the light of Certeau⁷¹ are perceptible, in the sense of: overcoming the language problem; appointments to teaching jobs under the permitted legal age, on average fourteen year old, when the legal age was eighteen; appointments to the job by members of the community who sometimes had great influence on the community and/or in politics.

Both in the urban region, at elementary schools, and in the rural area, in beginners' schools, religious teaching is a priority in the ICR communities. The Catholic religion is preponderant, and teaching the catechism is a central practice in the schooling process.

The memories of these teachers, at the same time take on specific meanings, when they express unique feelings and collective when they interweave at points of contact which articulate with each other and become structured, producing a past that is recomposed, bringing dimensions that are difficult to perceive through written documents. The use of memory as a source is an attempt to «find again the originality, irreducible to any a priori definition, of each system of thinking, in its complexity and displacements»⁷².

Although these factors may be considered fundamental, other matters related to the schooling process are discussed. Among these can be mentioned that in the Region there was a lack of teachers in general, and, specifically, those who could teach in Portuguese. The need to qualify these professionals; the non-adaptation of some teachers coming from other regions of Brazil or even the state to the colony, because of the specificity of these communities; the way those who were going to teach were selected; the non-acceptance of some teachers by the community, especially in the rural area.

⁷¹ Certeau, *A Escrita da História*, cit.

⁷² R. Chartier, *À beira da falésia: a História entre certezas e inquietude*, Porto Alegre, Ed. Universidade-UFRGS, 2002, p. 27.

Educazione alla vita politica. Individuo e società nel pensiero di José Ortega y Gasset, a partire dalle *Meditaciones del Quijote* (1914)

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Education to political life. Individual and society in the thought of Ortega y Gasset since the Meditaciones del Quijote (1914)

ABSTRACT: Despite its large number of works devoted to education, the philosophy of Ortega y Gasset has been scarcely analysed in regard to the theme of pedagogy. In addition, this has often been treated as a secondary aspect of his multifaceted thought. Contrary to this opinion, the article aims at demonstrating that his theorisations on pedagogy were strictly connected with his overall philosophical account, playing a central role in it, for instance strongly interplaying with his notions of practical and vital reason. As it will be proved, in his famous *Meditaciones del Quijote* he tried to merge educational and political reform, conceiving education as the unique means through which Spain and its people could have reached better material, and spiritual, conditions. Significantly, and contrary to the interpretations of other intellectuals of his age, he considered Cervantes' book as an epitome of the possibility of creating new epistemic and social paradigms through education. Thus, defining education as a precondition for political life, in his long activity he developed an overall theory of social construction according to which only through educational practices individuals could have had the opportunity to grasp a better understanding of the structure of the society in which they lived, being in this way apt to actively intervene in it, willing to reform, rather than destroy, their habitual social relations.

EET/TEE KEYWORDS: José Ortega y Gasset; Political Education; Philosophy of Education; Spain; XX Centuries.

Introduzione: Ortega e la pedagogia

Molteplici sono gli interessi di cui si compone la riflessione di Ortega y Gasset e ancora di più i sentieri che possono essere percorsi per leggere, analizzare e problematizzare i suoi scritti. Questo articolo pone l'attenzione su un solo ma decisivo aspetto della sua opera, vale a dire l'importanza cruciale della problematica educativa all'interno della sua vasta produzione filosofica¹. Per dimostrarne la rilevanza si procederà nel modo seguente: a partire dal suo primo libro, vale a dire le note *Meditaciones del Quijote* di cui ricorre quest'anno il centenario della pubblicazione, si chiariranno in primo luogo i rapporti che legano tale testo alle condizioni storico-politiche a partire dalle quali esso vide la luce, sottolineando la rilevanza che queste assunsero nel definire alcuni aspetti della riflessione sviluppata dal filosofo circa la funzione direttiva dell'intellettuale nei confronti dell'educazione collettiva della propria nazione. Si delinea in primo luogo il contesto che caratterizzò la pubblicazione delle *Meditaciones* e le intenzioni che ne animarono la stesura. In ciò una funzione chiave svolgerà la stretta relazione tra queste e *Vieja y Nueva Política*, scritto che con le prime non condivide soltanto l'anno di composizione. Il legame che si metterà in luce tra impegno teoretico e impegno politico all'interno dell'esperienza filosofica orteghiana consentirà quindi di apprezzarne la volontà riformatrice, marcatamente polemica nei confronti delle esperienze intellettuali del passato spagnolo, collocata all'interno d'un quadro sociale sempre più dinamico, seppure ancora legato ad una struttura della società e della politica di fatto assai arretrata. Una volontà riformatrice il cui intento era quello di

¹ Sulla questione dell'educazione in Ortega si conta ad oggi un numero piuttosto limitato di studi critici di una certa estensione, articoli e saggi brevi. Tale aspetto della sua riflessione viene molto spesso trattato in maniera solo incidentale, finendo così per apparire al più come un aspetto secondario rispetto al complessivo disegno della meditazione orteghiana, con la conseguenza di apparire in tal modo solo come un orpello all'interno della sua produzione filosofica articolantesi esclusivamente all'interno di episodici scritti pedagogici, notoriamente *La pedagogía social como programa político* (1910); *Biología y Pedagogía. El Quijote en la Escuela* (1920); *Pedagogía y anacronismo* (1923); *Misión de la Universidad* (1930); *Prólogo a Pedagogía general* derivada del fin de la educación de F.J. Herbart (1935). A fare parziale eccezione all'interno di tale tradizione critica sono, tra i volumi recenti di maggiore ampiezza, in particolare quello di S.M. Tabernero del Río, *Filosofía y educación en Ortega y Gasset*, Salamanca, Publicaciones de la Universidad Pontificia de Salamanca, 1993; F. Cambi, A. Bugliani, A. Mariani (edd.), *Ortega y Gasset e la Bildung*, Milano, Unicopli, 2007; e la più recente tesi dottorale di J. M. Monfort Prades, *La cultura en Ortega: ámbito en el que se realiza la vida humana*, Tesi Dottorale inedita, Madrid, UNED, 2011. Molto interessante, inoltre, è anche il recente libro di J. San Martín, *La fenomenología de Ortega y Gasset*, Madrid, Biblioteca Nueva, 2012, in cui il rapporto simbiotico tra concettualizzazione della cultura ed accrescimento della personalità viene rilevato in misura rilevante. Tra i più numerosi, ma spesso necessariamente frammentari articoli mi limito qui a segnalare, per il singolare tentativo di periodizzazione ed evoluzione del tema pedagogico in relazione alla filosofia complessiva del pensatore madrileno, il contributo assai interessante di A. Casado, *Ortega y la educación: perfiles de una trayectoria*, «Revista española de pedagogía», vol. LIX, n. 220, 2001, pp. 385-401.

salvare l'individualità di ogni singola persona, isolata e dispersa nella società, attraverso la promozione della sua partecipazione consapevole ai meccanismi che la sostengono; partecipazione, a sua volta, resa possibile attraverso un'opera di avvicinamento della cultura a doppio senso: degli strati più ampi della popolazione verso di essa attraverso la diffusione per canali istituzionali dell'educazione, e della cultura verso la gente attraverso una sua divulgazione capace di farla divenire popolare in quanto resa adatta ad essere recepita. Infine, per mezzo dell'analisi di alcuni testi della sua produzione matura, si chiariranno i termini per cui in Ortega risulta possibile, a partire proprio dalla riflessione sul principio pedagogico che evolve nel corso del tempo fino ad allargarsi al tentativo di ridefinire l'idea di cultura in una dimensione europea, rintracciare i presupposti di una elaborata sociologia che pone al centro lo sviluppo della personalità individuale per mezzo dell'educazione all'interno della società.

Ciò che si definirà sarà dunque un'educazione intesa come accrescimento della comprensione e partecipazione del cittadino alla vita pubblica in quanto pensata come strumento di comunicazione tra la vita sociale e la vita individuale. La pedagogia fu infatti concepita dal filosofo spagnolo come il ponte necessario tra la società e il singolo individuo. Nel parlare di pedagogia non ci si arrischiò alla ricerca di possibili riscontri di proposte innovative avanzate dal filosofo madrileño su tale disciplina rispetto al modo in cui essa è venuta definendosi quale branca di studio autonoma. Piuttosto, attraverso il riferimento ad alcune opere in apparenza non dedicate esplicitamente a tale tema e appartenenti a periodo assai differenti della sua produzione², composte rispettivamente nel corso della prima e della seconda navigazione della produzione del filosofo³,

² Non esiste una completa unanimità tra gli studiosi di Ortega circa la corretta periodizzazione dei diversi momenti che segnarono la lunga carriera del filosofo spagnolo. Con autorevolezza C. Morón Arroyo – in *El sistema de Ortega y Gasset*, Madrid, Alcalá, 1968, pp. 77-85 – distinse quattro momenti evolutivi nel pensiero orteghiano: 1. Razionalista (1907-1914), 2. Incentrato sulla nozione di prospettiva (1914-1920); 3. Psicologista e vitalista (1920-1927); 4. Razio-vitalista (1928-1955). Tuttavia tale periodizzazione fu molto discussa e, diversamente Ferrater Mora (*Ortega y Gasset. Etapas de una filosofía*, Barcelona, Seix Barral, 1973), distinse tre differenti periodi: 1. Oggettivista (1902-1914); 2. Prospettivista (1914-1923); 3. Razio-vitalista (1924-1955). Quest'ultimo modello tripartito trova sostenitori anche negli studi recenti, come quello di A. de Haro Honrubia, *Élites y masas. Filosofía y política en la obra de José Ortega y Gasset*, Madrid, Biblioteca Nueva, 2008. Tuttavia anche il primo modello quadripartito viene tuttora seguito – pur con notevoli differenze – ad esempio da uno dei più autorevoli studiosi italiani, Armando Savignano, che nel pensiero di Ortega distingue tra: 1. Periodo giovanile (1902-1914), 2. Periodo antropologista e vitalista (1914-1928), 3. Periodo incentrato sul nesso biologia/storia (1928-1935), 4. Periodo contrassegnato da inappagata ansia sistematica (1935-1955). Cfr. A. Savignano, *Introduzione*, in José Ortega y Gasset, *Origine ed epilogo della filosofia*, Milano, Bompiani, 2002.

³ Di seconda navigazione, di cambio di rotta in direzione di una produzione filosofica più sistematica, riflessiva e meno militante parla già in maniera esplicita lo stesso Ortega nel 1932: «Es, pues, lo más probable que mi labor futura consista principalmente en forja de libros. Más, por lo mismo, aprovecho la ocasión para decir a los que años y años censuraron mi solicitud periodística que no tenían razón. [...] Pero esto no contradice que la nueva faena requiera ineludiblemente el

si metterà in evidenza come il problema educativo fu una questione sempre al centro delle sue riflessioni tanto da costituire parte integrante, e pur tuttavia spesso sottostimata, della sua stessa prospettiva filosofica generale. In particolare, ciò che si andrà sempre più definendo sarà la funzione in primo luogo politica che la produzione e la conseguente trasmissione della cultura assunsero nel pensiero orteghiano, non solo nel progetto di riforma politica e culturale del suo paese che egli sposò con fervore nel suo periodo giovanile, ma ancor di più nella radicalizzazione del suo pensiero più maturo, aperto ad una dimensione marcatamente europea.

1. *Una congiuntura significativa: il 1914 e le Meditaciones del Quijote*

Le *Meditaciones del Quijote* costituiscono, come noto, un insieme articolato – e forse per questo talvolta persino frammentario – di riflessioni a cui Ortega volutamente conferì una forma del tutto provvisoria, allusiva. Nell'analizzare con attenzione tale testo risulta infatti evidente come in esso si accavallino diverse tematiche, così che l'opera finisce per dar vita a un vero e proprio arcipelago di spunti⁴. Il suo tentativo di dare alla luce per la prima volta un testo organico ne evidenzia allo stesso tempo la volontà di non tralasciare nessuna delle questioni su cui, anche in scritti precedenti, si era già soffermato e che maggiormente gli dovevano rivelare la fecondità di possibili sviluppi. Con riguardo alla sola questione educativa, è importante sottolineare come essa in precedenza già fosse stata trattata all'interno di svariati scritti del filosofo, in particolare nella stretta connessione con il suo pur fallimentare progetto di riforma del proprio Paese sull'esempio delle altre esperienze europee⁵. Già in un breve articolo pubblicato dalle colonne de *El Imparcial* nel gennaio del 1908, Ortega scriveva infatti che al centro di ogni sua attenzione vi era proprio la volontà di

libro, un tipo de libro que está mas allá de los artículos de periódico[...]. Empieza, pues, nueva tarea. ¡Al mar otra vez, navecilla! ¡Comienza lo que Platón llama “la segunda navegación”!». Si veda J. Ortega y Gasset, *A una edición de sus Obras*, in *Obras Completas, tomo V (1932-1940)*, Madrid, Taurus, Edición Fundación José Ortega y Gasset Centro de Estudios Ortegaianos, 2006, p. 99.

⁴ Di distinti sub-progetti presenti nelle Meditazioni parla ad esempio Helio Carpintero il quale segnala, e su di essi esercita un'analisi molto attenta ed accurata, l'esistenza congiunta di: 1. Una preoccupazione nazionale; 2. Un interesse per la riforma morale della società spagnola; 3. Un ideale di umanità presente in tale ordine morale; 4. Una nuova filosofia della vita; 5. Una visione intuitiva di questa a partire dalla sua rappresentazione nella novella; 6. Un'azione educativa che trasferisce il nuovo ordine al corpo del paese, attraverso le azioni sociali della formazione, della letteratura, del saggio e della divulgazione. Cfr. H. Carpintero, *Ortega, Cervantes y las Meditaciones del Quijote*, «Revista de Filosofía», vol. 30, n. 2, 2005, p. 11.

⁵ Sul tentativo fallimentare di riforma culturale proposto dal partito operaio spagnolo si veda in particolare J.L. Villacañas, *Introducción*, in José Ortega y Gasset, *Meditaciones del Quijote*, Madrid, Biblioteca Nueva, 2004, pp. 44-45.

rinnovare la percezione e il significato stesso del termine cultura accettato dal popolo spagnolo, sull'esempio delle nazioni europee più progredite, come la Germania⁶: «[e]ste es el tema entorno al cual quisiera urdir algunas variaciones útiles [...] para fomentar lo que es en mí una idea fija, una manía opresora: la reforma del concepto que se tiene vulgarmente de la cultura»⁷.

Per dirla in breve, il programma pedagogico di Ortega assunse in un primo momento la forma di in un progetto politico di europeizzazione, peraltro molto ambizioso⁸ ma destinato a fallire piuttosto rapidamente, nonostante quanto auspicato nella nota conferenza svoltasi a Bilbao nel marzo 1910 intitolata *La pedagogía social como programa político*. Impegno politico e attività educativa divennero in questo periodo espressioni sinonimiche nel lessico orteghiano⁹. Anche per questo è dunque legittimo sostenere che le *Meditaciones* possano rivelare gran parte della propria ragion d'essere se interpretate in una chiave marcatamente politica. Questo in primo luogo perché, come suggerisce l'autore stesso, direttamente o indirettamente esse finiscono per riferirsi in maniera costante alla circostanza spagnola¹⁰. Inoltre, poiché in esse è presente, come noto, un inciso autoreferenziale di notevole estensione inserito da Ortega all'interno della *Meditación Preliminar* all'interno della quale viene riportato estesamente quanto dichiarato qualche mese prima nel discorso svolto in rappresentanza della *Liga de Educación Política Española*, organizzazione politica apartitica, nonostante la sua attenzione per il *Partido Reformista*,

⁶ Come noto in Germania Ortega spese diversi anni della sua formazione filosofica. Nell'elaborazione di tale progetto di riforma politica e culturale egli sembra essere stato molto influenzato in particolare da uno dei suoi maestri a Marburgo, ovvero Paul Natorp, autore nel 1899 della nota *Sozialpädagogie*, definita «ammirabile» dallo stesso Ortega. Nelson Orringer mette in risalto in particolare modo, oltre all'influenza di tale scritto, anche quella di un altro testo di grande respiro teorico del pensatore tedesco: la *Einleitung in die Psychologie nach kritischer Methode*, testo pubblicato a Friburgo nel 1888. Cfr. N. Orringer, *Ortega y sus fuentes germánicas*, Madrid, Gredos, 1979, in particolare alle pp. 75-106.

⁷ J. Ortega y Gasset, *Las dos Alemanias*, in *Obras Completas, tomo I (1902-1915)*, Madrid, Taurus, Edición Fundación José Ortega y Gasset Centro de Estudios Ortegaianos, 2004, p. 135.

⁸ Secondo il pensatore madrileño tale avrebbe dovuto essere la rilevanza della riforma culturale proposta all'altezza del 1909-1910 che «la cultura viene a sostituire la idea mitológica de Dios en su función de socializador», e che pertanto, in quanto socialisti, «traemos una nueva religión; traemos la sublime eucaristia: traemos la cultura». Si veda J. Ortega y Gasset, *La ciencia y la religión como problemas políticos*, in *Obras Compleas, tomo VII (1902-1925, Obras Postumas)*, Madrid, Taurus, 2006, pp. 133 e 135.

⁹ Come ha dimostrato chiaramente A. Elorza, *La razón y la sombra. Una lectura política de Ortega y Gasset* (1984), Barcelona, Editorial Anagrama, 2002², p. 43, per Ortega: «[R]esulta imprescindible, para alcanzar la práctica transformadora, pasar antes por la movilización de ese cuerpo mostrenco que comprende la mayoría de la población. De ahí que necesariamente democracia signifique pedagogía. [...] Es el problema en que se debate Ortega en sus diez primeros años, de optar por una labor pedagógica, siempre fundamental para él pero sin incidencia concreta sobre un país en crisis de régimen [...]».

¹⁰ Ortega y Gasset, *Lector*, in *Meditaciones del Quijote*, in *Obras Completas, tomo I (1902-1915)*, cit., p. 747.

fondata nell'autunno del 1913¹¹. Il discorso pronunciato da Ortega nel *Teatro de la Comedia* il 23 Marzo del 1914, significativamente intitolato *Vieja y Nueva Política*, costituiva il distillato di una lunga serie di riflessioni condotta dal filosofo spagnolo negli anni precedenti¹². Di questo manifesto ufficiale di una generazione intera di giovani intellettuali¹³ Ortega scelse di riportare all'interno delle sue *Meditaciones* la critica alla mancanza di vivacità e spessore intellettuale caratterizzante il periodo della Restaurazione, sottolineando quindi come il suo intento fosse proprio quello di ridare grandezza alla cultura spagnola attraverso la fondazione di una nuova politica intesa in primo luogo come un nuovo modo di rapportarsi alla realtà sociale dopo una previa attività intellettuale. I filosofi, i critici letterari e in termini più generali gli uomini pubblici della Restaurazione, infatti, «aplaudían la mediocridad porque no tuvieron la experiencia de lo profundo»¹⁴ dimostravano quindi di possedere un modo troppo superficiale di leggere i prodotti della vita spirituale, carenti della capacità analitica necessaria per comprendere e dirigere la popolazione. Da questa volontà di contrapposizione, di «negación de la España caduca»¹⁵ e allo stesso di creazione, ossia di «experimentos de nueva España»¹⁶ è animato del resto il progetto complessivo, e incompiuto, delle *Meditaciones*. In esse trova espressione un profondo dissenso maturato dal giovane professore dell'ateneo madrileño nei confronti di un'intera generazione d'intellettuali che aveva fino ad allora prodotto spagnoli «educados por una edad rencorosa, que había laminado el universo y hecho de él una superficie, una pura apariencia»¹⁷. Proprio in virtù di tale spirito di contrapposizione e allo stesso tempo di promozione di possibili soluzioni si potrebbe affermare che le *Meditaciones* altro non siano che una possibile esemplificazione teoretica più approfondita di quanto affermato da Ortega in occasione della già citata conferenza, di per sé assai meno rilevante dal punto di vista squisitamente teoretico. Egli, in quella sede, aveva infatti dichiarato che un processo di riforma politica non doveva implicare una costruzione *ex novo* di una differente società, ma doveva invece dare voce a quanto in maniera latente già era presente nelle coscienze dei cittadini spagnoli¹⁸. In stretta continuità rispetto a tale dichiarazione

¹¹ Elorza, *La razón y la sombra*, cit., pp. 72-74.

¹² «El texto de tal disertación contiene casi todo lo que su autor había ya dicho sobre España, en diferentes ocasiones y en diversos artículos. No hay pues, rectificación, sino exposición sistematizada de conjunto». Cfr. Tabernero del Rio, *Filosofía y educación en Ortega y Gasset*, cit., p. 57.

¹³ Cfr. J.E. Pflüger Samper, *La generación política de 1914*, «Revista de Estudios Políticos», n. 112, Abril-Junio 2001, pp. 179-197, in particolare alle pp. 181-185. Si veda inoltre il più recente libro di J. Esteban, *La Generación del 98 en sus anécdotas*, Madrid, Renacimiento, 2012.

¹⁴ Ortega y Gasset, *Meditaciones del Quijote*, in *Obras Completas, tomo I*, cit., p. 772.

¹⁵ *Ibid.*, p. 762.

¹⁶ *Ibid.*

¹⁷ *Ibid.*, p. 802.

¹⁸ Egli a tal proposito parla infatti di «nueva declaración y voluntad de pensamientos que, más o menos claros, se encuentran ya viviendo en las conciencias de nuestros ciudadanos». Ortega y

d'intenti, l'interpretazione da lui offerta del cervantismo del libro Quijote mirava nelle *Meditaciones* a costituire una nuova e differente chiave di lettura di un testo atavicamente radicato nell'identità collettiva del popolo spagnolo, ma anche molto dibattuto da numerosi intellettuali, rappresentanti di fatto della circostanza con cui egli si scontrava. L'avversario dichiarato, come l'ha definito in un suo puntuale saggio Pedro Cerezo Galán¹⁹, era evidentemente Miguel de Unamuno che nella figura del *Quijote* scorgeva il simbolo dell'eroe di un'umanità disperata, combattuta nello scontro tra ragione e fede. Scontro dal quale solo attraverso la sottomissione a quest'ultima l'uomo si sarebbe potuto salvare da un'interna e tragica lacerazione²⁰. Ma nella generazione del '98 Ortega non scorgeva soltanto riferimenti culturali contro cui polemizzare aspramente, quanto simboli contro cui scontrarsi e confrontarsi anche con rispetto e attenzione²¹. Oltre al confronto deciso con il suo maestro Unamuno, infatti, di notevole interesse risultano anche quelli con Pio Baroja e Azorín: il primo dei quali partecipò inoltre al progetto editoriale di España, dando il suo contributo attraverso articoli comparsi sulla rivista²². A questi due intellettuali, secondo il progetto inizialmente dichiarato da Ortega, dovevano essere dedicate altre due meditazioni che invece non compaiono qui, ma che ritroviamo sotto forma di saggi isolati contenuti ne *El Espectador* e risalenti al 1916²³. In riferimento a Piò Baroja, l'eccessiva vacuità, l'assenza di una direzione precisa e di un obiettivo chiaro è ciò che Ortega critica nei confronti della volontà dinamica, che in massima parte pure condivide, ma che trova troppo ondeggiante e fine a se stessa nella concezione della vita e della felicità rappresentata dagli eroi dei romanzi di Pio Baroja²⁴; mentre della concezione

Gasset, *Vieja y Nueva Política*, in *Obras Completas*, tomo I, cit., p. 710.

¹⁹ Cfr. P. Cerezo Galán, *Cervantes y El Quijote en la aurora de la razón vital*, «Revista de Occidente», 2007, p. 12.

²⁰ Si veda a tale riguardo M. de Unamuno, *Del sentimiento trágico de la vida en los ombre y en los pueblos* (1905), trad. it. a cura di J. López y García-Plaza, *Del sentimento tragico della vita*, Casale Monferrato, Piemme, 2004 e dello stesso *Vida de Don Quijote y Sancho* (1913), trad. it. a cura di A. Gasparetti, *Vita di don Chisciotte e Sancio Panza*, Milano, Mondadori, 2005. Sulla relazione tra filosofia e fede nelle riflessioni di Unamuno si veda l'utile introduzione di A. Savignano (ed.), *Miguel de Unamuno – Filosofia e religione*, Testo spagnolo a fronte, Milano, Bompiani, 2013.

²¹ Sulla relazione tra la generazione del '98 e quella del '14 si vedano in particolare E. Storm, *La perspectiva del progreso: pensamiento político en la España del cambio del siglo (1890-1914)*, Madrid, Biblioteca Nueva, 2001.

²² Cfr. P. Cerezo Galán, *Ortega: "niente affatto moderno e molto XX secolo"*, in *La vocazione dell'arciere. Prospettive critiche sul pensiero di José Ortega y Gasset*, a cura di G. Cacciatore e A. Mascolo, Bergamo, Moretti e Vitali, 2012, in partic. pp. 87-90.

²³ Di tale connessione ha sottolineato la rilevanza in maniera particolare I. Fox, *Meditaciones sobre la literature y el arte*, Castalia, Madrid, 1988. Il saggio su Pio Baroja è contenuto all'interno de *El Espectador I* (si veda Ortega y Gasset, *Obras Completas*, tomo II (1916), cit., pp. 211-241); quello su Azorín in *El Espectador II* (ora in *Obras Completas*, tomo II, cit., pp. 291-322).

²⁴ J. Ortega y Gasset, *Ideas sobre Piò Baroja*, in *Obras Completas*, tomo II, cit., p. 232: «[D]esde luego, sospechamos que para el hombre de acción sano y fuerte la acción no es el ideal.

di Azorín denuncia in modo particolare la spersonalizzazione e devitalizzazione dell'esperienza individuale. L'eroe rappresentato dal *Quijote*, per Ortega, è invece colui che valorizza la propria individualità anche in opposizione alle imposizioni sociali, colui per il quale «su vida es una perpetua resistencia a lo habitual y consueto. Cada movimiento que hace ha necesitado primero vencer a la costumbre e inventar una nueva manera de gesto»²⁵.

Considerate da questa prospettiva, quindi, le *Meditaciones* rappresentavano il tentativo di edificare una nuova Spagna in opposizione ad una vecchia e caduca ritenuta ormai inefficace e retrograda eppure resa dominante da una certa cerchia intellettualmente e politicamente molto influente nel Paese. Tale attività riformatrice, tuttavia, era concepita in continuità rispetto a quello che per Ortega costituiva il passato migliore proprio dell'esperienza vitale spagnola. Proprio per risvegliare tale sentimento, che secondo lui era solo sopito nella società in cui viveva, egli si servì d'un eroe popolare e d'un libro che, in evidente contrapposizione alle interpretazioni precedenti, veniva ora innalzato a rappresentante di un genere letterario nuovo e originale, il romanzo moderno, simbolo dell'essenza di una nuova società spagnola vitale e dinamica, tendente ad un'idealità potenzialmente tragica ma animata da un dinamismo il quale ribolliva, al momento in cui Ortega ne scriveva, al di sotto di un sistema istituzionale ufficiale logoro e atrofizzato²⁶. Il *Quijote* costituiva, quindi, assai più che una semplice lettura scolastica, anzi qualcosa di radicalmente differente e da non confondere con essa: un autentico apprendistato alla vita²⁷.

La discussione di tale testo diviene quindi un pretesto, per l'autore, utile a porre in questione la circostanza attuale del proprio Paese. Il tentativo di attualizzazione del romanzo operato dal filosofo è reso evidente dall'identificazione di tale genere letterario proprio con la descrizione di ciò che è attuale, identificazione proposta da Ortega nella *Meditación Primera*, che strumentalmente si rivolge così alla realtà sociale spagnola in cui egli si trovava allora a vivere. Risulta così evidente la contiguità, in questo periodo della produzione orteghiana, tra impegno accademico e giornalistico, sui maggiori quotidiani nazionali liberali²⁸ a cui, anche per ragioni familiari, era legato; ma si evidenzia anche un'altra caratteristica saliente del pensiero orteghiano. Infatti,

El hombre sano y fuerte cree en muchas cosas, en un porvenir del mundo, tal vez en un credo religioso, político o filosófico; de todas suertes, en una idea. La acción es, más bien, el ideal de Baroja, que no es sano ni fuerte, sino acaso reumático y dispéptico».

²⁵ Ortega y Gasset, *Meditaciones del Quijote*, in *Obras Completas, tomo I*, cit., p. 816.

²⁶ Per un'attenta analisi del pensiero di Ortega sull'essenza del romanzo si veda il bel saggio di D. Pini, *Il filosofo e il cane della commedia*. *Meditaciones del Quijote, I, 15*, in A. Gallo, K. Vaiopoulos (edd.), *Por tal variedad tiene belleza. Omaggio a Maria Grazia Profeti*, Firenze, Alinea, 2012, pp. 545-554.

²⁷ Cfr. Ortega y Gasset, *El Quijote en la escuela*, in *Obras Completas, tomo II*, cit., pp. 401-430.

²⁸ Sull'interesse e sul rilievo che nel pensiero di Ortega rivestì il giornalismo si veda in particolare l'interessante studio di I. Blanco Alfonso, *El periodismo de Ortega y Gasset*, Madrid, Biblioteca Nueva, 2005.

la ben nota volontà di avventura che caratterizza don Chisciotte e che viene definita dal filosofo madrileño come «real y verdadera»²⁹ veniva strettamente vincolata alla volontà ideale di riforma politica da lui proposta la quale non era concepita come il «vapor de un cerebro»³⁰ ma era pensata in rapporto stretto con la concreta circostanza nella quale operava, proprio con la volontà di modificarla in una maniera determinata e non vaga. Nel tentativo di salvare la propria circostanza³¹, Ortega propone quindi una salvezza della sua patria in primo luogo da affrontare sul piano sociale, attraverso un'azione intellettuale mirante in primo luogo a renderla più progredito, anche, come detto, per mezzo di un'influenza esterofila³². Ma cosa rendeva la condizione della Spagna d'inizio secolo così bisognosa dell'intervento soccorritore di Ortega e del nutrito gruppo d'intellettuali al seguito? Per comprenderlo è necessario ricordare seppur in breve la situazione socio-politica di tal periodo.

2. *Le condizioni materiali*

L'ambiente intellettuale nel quale si trovò immerso Ortega era vincolato in maniera particolare al dibattito interno al rigenerazionismo circa l'edificazione di una nuova politica educativa che ponesse al centro gli insegnamenti della filosofia krausista, fatta propria in particolare da Giner de los Rios e dalla sua *Institución libre de enseñanza*³³. Tale istituzione, come ha sottolineato Vicente Cacho Viu, si configurò non soltanto come un laboratorio pedagogico, ma anche come un potenziale gabinetto politico composto di studiosi in grado di consigliare il governo su temi sociali, oltre che come un luogo dello spirito in cui trovavano solidale tranquillità giovani e vecchi intellettuali spagnoli e, inoltre, come nucleo primigenio del liberalismo radicale³⁴. Ortega nel proporre la propria idea di pedagogia non aveva di mira quindi solo un dibattito già per certi versi

²⁹ Ortega y Gasset, *Meditaciones del Quijote*, in *Obras Completas*, tomo I, cit., p. 816

³⁰ *Ibid.*, p. 811.

³¹ Sulla dimensione esistenziale della *salvación* in Ortega, su cui qui non ci si sofferma privilegiando invece l'aspetto politico, si veda ad esempio il recente studio di L. Parente, *Ortega y Gasset e la "vital curiosidad" filosofica*, Milano-Udine, Mimesis, 2013, in partic. pp. 15-20.

³² Nelle *Meditaciones* Ortega, infatti, «delinea una idea di filosofia come scienza universale coniugata con il riconoscimento della sua costitutiva valenza pratica in questa capacità di comprensione-*salvación* del presente ed elaborazione di un progetto politico-culturale che disegni, altresì, il compito proprio dell'intellettuale nei confronti della realtà». Così si esprime in maniera molto chiara C. Cantillo, *La ragione e la vita. Ortega y Gasset interprete di Hegel*, Soveria Mannelli, Rubbettino, 2012, pp. 33-34.

³³ Si veda in particolare C. Adagio, *Chiesa e nazione in Spagna. La dittatura di Primo de Rivera (1923-1930)*, Unicopli, Bologna, 2004, in partic. alle pp. 45-47.

³⁴ V. Cacho Viu, *Los intelectuales y la política. Perfil público de Ortega y Gasset*, Madrid, Biblioteca Nueva, 2000, pp. 156-157.

quasi stantio tra rigenerazionisti e conservatori³⁵, quanto la fascinazione per la complessiva influenza di tale *Institución* intesa come esperienza intellettuale a tutto tondo. In continuità con la capacità di comprensione della realtà sociale di tale istituzione, la sua attenzione all'aspetto educativo si fondava sulle condizioni reali in cui versava la società spagnola, che si possono in breve ricordare attraverso l'ausilio di alcune statistiche. L'interesse per questi dati aggregati non era del resto alieno allo stesso Ortega: nel *Prospecto de la liga de Educación Política Española* è proprio lui a sostenere la necessità di sviluppare «la elaboración de estadísticas y enquestas fidedignas»³⁶ al fine di riformare efficacemente la nazione, partendo dalle forze giovani del paese. Il solo appello ad una particolare generazione va compreso in almeno due direzioni: a) l'appartenenza ad essa di Ortega e del gruppo di intellettuali che in lui si riconosceva; b) la sua vasta rappresentanza all'interno della popolazione. Oltre il 50% della popolazione spagnola aveva infatti meno dell'età di Ortega nel momento in cui egli pronunciò la sua conferenza nel *Teatro de la Comedia*³⁷: evidentemente ciò poneva la Spagna di fronte ad uno scontro generazionale che prima ancora di essere uno scontro tra paradigmi e visioni del mondo era uno scontro reale, con da una parte uno Stato bloccato in una gerontocrazia insopportabile per un giovane intellettuale quale era a quel tempo Ortega y Gasset e dall'altro una realtà sociale giovane e dinamica. Inoltre, ciò contribuisce a evidenziare come l'interesse del filosofo madrilenico in tale periodo fosse rivolto ad un coinvolgimento popolare che fosse il più vasto possibile, mentre in seguito la platea alla quale si indirizzerà sarà progressivamente sempre più ristretta³⁸, acuendosi di converso la sua predilezione per una visione elitista e, per dirla in termini filosofici, nietzschiana, della stessa antropologia politica³⁹. In riguardo alla situazione educativa, la percentuale di analfabetismo nel 1875 era pari al 75% della popolazione adulta, era poi, nel 1910, ancora molto alta, intorno al 60%⁴⁰, e nel 1920 del 42,5% se si prende in considerazione solo la fascia d'età compresa tra i 10 ai 60 anni⁴¹. Complessivamente

³⁵ Per una possibile ricostruzione di questo dibattito si veda tra gli altri lo studio di R. Mazzetti, *Società e educazione nella Spagna contemporanea*, Firenze, La Nuova Italia, 1966.

³⁶ Ortega y Gasset, *Prospecto de la "Liga de Educación Política Española"*, in *Obras Completas*, I, cit., p. 742.

³⁷ Cfr. M. Samaniego Boneu, *La política educativa de la segunda república durante el bienio azañista*, Madrid, CSIC Escuela de Historia Moderna, 1977, in partic. p. 141.

³⁸ «Desde sus primeros escritos, el filósofo español censurará los excesos y radicalismos democráticos, la democracia entendida erróneamente como nivelación universal. De este peligro, y bajo la estela nietzscheana, nos alerta, en efecto desde 1910, aun cuando será en su obra madura donde más profundice en este asunto». A. de Haro Honrubia, *Élite y masas*, cit., p. 66.

³⁹ Sull'influenza di Nietzsche all'interno del panorama filosofico spagnolo si veda in particolare lo studio di J.E. Esteban Enguita, *El joven Nietzsche*, Madrid, Biblioteca Nueva, 2010.

⁴⁰ Cfr. Samaniego Boneu, *La política educativa de la segunda república*, cit., p. 143.

⁴¹ Tabernero del Río, *Filosofía y educación en Ortega y Gasset*, cit., p. 19. Qui l'autore riporta in particolare i dati elaborati da Luzuriaga, discepolo di Ortega e a sua volta grande pedagogista spagnolo.

va evidenziato come più di metà della popolazione spagnola nata tra il 1876 e il 1915 fosse priva di una qualsivoglia forma di educazione, quindi completamente analfabeta⁴². Si tratta di percentuali molto alte se comparate ai paesi dell'Europa centrale e settentrionale, nazioni a cui Ortega, data la sua formazione e i suoi interessi intellettuali, guardava con particolare interesse. A livello di insegnamento primario il rapporto tra alunni e insegnanti era di oltre 75 a 1⁴³, mentre l'insegnamento universitario riguardava, tra il 1917 e il 1935, soltanto una percentuale compresa tra l'1 e il 2 per mille della popolazione spagnola potenzialmente dedita agli studi⁴⁴, e l'insegnamento secondario o superiore invece meno del 2% del totale⁴⁵. Quella dell'istruzione secondaria e universitaria si configurava quindi come una realtà di fatto estremamente elitaria e poco integrata nella cultura dell'epoca. L'intervento legislativo per migliorare tale situazione durante il primo ventennio del XX secolo non incise in maniera strutturale attraverso un organico intervento di riforma. Si possono infatti evidenziare solo interventi sporadici e isolati, per quanto importanti nella loro specificità. Tra questi la creazione della *Junta para ampliación de Estudios e investigaciones científicas* nel 1907, il decreto legge per l'aumento, solo formale, della scolarizzazione dell'obbligo dai 6 ai 12 anni nel 1909, la *Residencia de Estudiantes* nel 1910 e quella *de Señoritas* nel 1915, l'*Instituto Escuela* nel 1918⁴⁶, prima struttura educativa che preparava all'ingresso nell'ambiente universitario rivolgendo la sua attenzione formativa ai ragazzi d'età compresa tra i 6 e i 17 anni. Nonostante la mancanza di un progetto unitario la condizione educativa si avviò comunque verso un miglioramento a partire dalla fine della prima guerra mondiale e in concomitanza con la relativa crescita economica del paese fino agli anni trenta quando si verificò però un brusco rallentamento durante la guerra civile⁴⁷. Data tale condizione materiale è evidente che Ortega, nel proporre una profonda riforma politica del proprio paese guardasse, tanto per le prospettive materiali che per quelle ideali della produzione del pensiero, al più ampio scenario europeo in cui scorgeva di fatto un possibile stimolo di miglioramento⁴⁸. Nonostante questo, il suo interesse

⁴² C.E. Nuñez, *Educación*, in A. Carreras, X. Tafunell (edd.), *Estadísticas Históricas de España: siglos XIX-XX*, vol. 1, Bilbao, Editorial Nerea, 20052, pp. 155-244, in partic. p. 164.

⁴³ Samaniego Boneu, *La política educativa de la segunda república*, cit., p. 157. Questa statistica, riportata nel Report del 1911 degli Stati Uniti fu ricordata da Santiago Alba, molto impegnato a sua volta nella denuncia del 'male spagnolo' dell'analfabetismo, in qualità di rettore in occasione del discorso d'apertura dell'anno accademico 1912-1913 della *Universidad de Valladolid*. Tale dato poteva dunque essere conosciuto dallo stesso Ortega.

⁴⁴ *Ibid.*, p. 354.

⁴⁵ Cfr. Nuñez, *Educación*, cit., p. 233.

⁴⁶ I testi di tali atti legislativi sono facilmente consultabili nella raccolta a cura di M. De Puelles Benitez, *Historia de la Educación en España*, Tomo III: *De la Restauración a la II República*, Madrid, Centro de Publicaciones de Ministerio de Educación y Ciencia, 1989.

⁴⁷ Cfr. Nuñez, *Educación*, cit., p. 209.

⁴⁸ Come ha efficacemente scritto J.L. Villacañas, *Comentario y notas a J. Ortega*, *Meditaciones del Quijote*, Madrid, Biblioteca Nueva, 2004, p. 117: «sólo desde Europa y su filosofía podemos

pedagogico non mirava semplicemente ad europeizzare la Spagna, quanto piuttosto a cercare una sorta di via spagnola all'Europa che rendesse conto delle peculiarità nazionali e facesse del problema spagnolo un punto di partenza per la sua stessa soluzione. Questa frase esige un chiarimento, per il quale non si può che fare ritorno alle *Meditaciones*.

3. *Comprensione e riforma: la dialettica dell'acculturazione*

Come già evidenziato, in questo testo come in *Vieja y nueva Política* a ricorrere assai spesso è il concetto di salvezza, di salvazione. Nel movimento dinamico implicato da tale concetto un ruolo fondamentale gioca, per Ortega, l'educazione e la cultura le quali sono da lui sempre declinate in senso politico⁴⁹. In generale, poiché diverse sono le definizioni di cultura che l'autore fornisce in questi testi, essa diviene sinonimo di possesso personale e riflessivo di una certa prospettiva, una cultura vitale in forte contrapposizione ad una cultura ideale intesa come sovrastruttura dominante la vita degli individui ed esterna ad essi⁵⁰. Le stesse istituzioni prodotte dalla cultura, come la Chiesa, lo Stato, la scuola, secondo la prospettiva orteghiana avrebbero infatti dovuto essere indirizzate ad accrescere l'esperienza vitale degli individui piuttosto che la grandezza delle istituzioni medesime⁵¹. Questa dicotomia tra una cultura esterna, imposta, ed una invece personale e interiorizzata viene espressa in maniera emblematica nella distinzione tra due modi diversi di relazionarsi alla realtà: un vedere passivo, che guarda soltanto alla materialità delle cose e quindi si limita ad una presunta oggettività della realtà esterna, e un vedere attivo che ricerca nelle cose il senso della loro esistenza interrogandosi sul significato che esse possiedono nei confronti della propria vita. Tale opposizione viene così articolata nella netta distinzione tra il mero conoscere e il sapere riflessivo,

descubrir el núcleo germinal de Don Quijote».

⁴⁹ Scrive infatti Lucia Parente che «[n]el periodo giovanile, la cultura si è configurata, quindi, come ideale etico, estetico e socio-pedagogico per poi giungere, nelle fasi successive di vita anche all'ideale estetico». Parente, *Ortega y Gasset e la "vital curiosidad" filosofica*, cit., p. 13. Tuttavia contrariamente a tale affermazione va sottolineato come già negli scritti giovanili di Ortega, a partire perlomeno dal biennio 1908-1909, il binomio cultura e riforma politica costituissero un *leitmotiv* della sua riflessione. Si veda per esempio la già citata conferenza dal titolo *La ciencia y la religión como problemas políticos*.

⁵⁰ «La cultura – la vertiente ideal de las cosas – pretende establecerse como un mundo aparte y suficiente, adonde podamos trasladar nuestras entrañas. Esto es una ilusión y sólo irada como ilusión, sólo puesta como un espejismo sobre la tierra, está la cultura puesta en su lugar». Ortega y Gasset, *Meditaciones del Quijote*, in *Obras Completas, tomo I*, cit., p. 812.

⁵¹ Ortega y Gasset, *Ideas sobre Pío Baroja*, in *Obras Completas, tomo II*, cit., p. 225: «Los organismos por la cultura creados – ciencia o moral, Estado o Iglesia – no tienen otro fin que el aumento y potenciación de la vida».

distinzione di stampo marcatamente neokantiano⁵². Al fine di sviluppare in particolare il sapere riflessivo, storicamente di fatto del tutto alieno a quella che Ortega definiva come la razza mediterranea, era quindi necessario che la filosofia svolgesse un ruolo educativo che accrescesse in modo particolare la sensibilità individuale, invitandola a porre domande alla realtà circostante, non accettandola semplicemente per ciò che poteva apparire superficialmente. In questo la figura eroica del personaggio *Quijote* simboleggia, con la sua indomita volontà di avventura, la non accettazione supina della realtà e il tentativo, per quanto immaginifico, di conformare ciò che esiste esteriormente alla propria volontà interiore. In tal modo, la volontà diviene il punto di partenza attraverso cui la personalità individuale plasma la realtà che circonda il soggetto stesso e contribuisce a modificarla, così da rendere possibile l'esteriorizzazione consapevole della soggettività stessa. *Don Quijote* rappresenta quindi lo sforzo eroico di costruzione di sé attraverso il mondo esterno e allo stesso tempo di modificazione di quest'ultimo, quindi il manifestarsi di ciò che è stata definita come la ragione vitale, la cui cifra caratteristica giace nella dinamica dell'esecutività del gesto creatore⁵³.

Proprio a partire da questa relazione tra individualità e mondo esterno si articola, a mio avviso, uno degli aspetti più interessanti di tale scritto orteghiano in relazione alla funzione eminentemente politica della pedagogia. In virtù dell'argomentazione avanzata dal filosofo spagnolo siamo infatti posti di fronte ad una dialettica della cultura che definisce quest'ultima da una parte come l'espressione più intima della personalità individuale, spontanea e libera, e dall'altra come realtà vincolata all'oggettività impersonale rappresentata dai prodotti della cultura stessa, coestensiva rispetto al mondo e prodotta dal lungo processo di civilizzazione. Il soggetto, nel suo atto creativo, si scontra infatti con una realtà che è già da sempre a lui data e che non gli appartiene, che cerca di modificare in relazione alla sua personalità, alla sua volontà, la quale però non si può formare indipendentemente da quella: «la voluntad – scrive infatti Ortega, si configura come un – objeto paradoxal que empieza en la realidad y acaba en lo ideal»⁵⁴. Si tratta dunque di una costruzione vincolata al mondo esterno che, passando attraverso l'esperienza soggettiva, trascende quest'ultima per risultare in uno stato di cose seppur immaginifico sempre potenzialmente traducibile in una nuova realtà. In tale contesto il compito della pedagogia proposta dal filosofo, la quale aspira a salvare entrambe le dimensioni dell'io e della circostanza, è dunque duplice e si svolge tanto sul piano personale che

⁵² Ortega y Gasset, *Meditaciones del Quijote*, in *Obras Completas*, tomo I, cit., p. 770.

⁵³ Quest'ultima a sua volta, come è stato notato, ripropone la dinamica di evoluzione che intercorre tra soggetto – oggetto – soggetto che il pensatore madrileno eredita in gran parte dalla riflessione simmeliana contenuta in nuce nel noto articolo *Der Begriff und die Tragödie der Kultur* (1911). Cfr. Monfort Prades, *La cultura en Ortega: ámbito en el que se realiza la vida humana*, cit., pp. 353-360.

⁵⁴ Ortega y Gasset, *Meditaciones del Quijote*, in *Obras Completas*, tomo I, cit., p. 818.

su quello impersonale. In funzione di tale dialettica si articola la sua pedagogia dell'amore, ossia della comprensione, la quale invita l'individuo a ripercorrere il processo vitale attraverso cui la cultura è venuta cristallizzandosi nel corso del tempo in un insieme compatto di idee, di norme, di usi. Solo in tal modo, attraverso questo sguardo profondo e non superficiale sulla realtà si potrà quindi acquisire la consapevolezza del fatto che essa non costituisce qualcosa di estraneo all'uomo ed indipendente da questi, ma quanto di migliore si sia prodotto a partire dalle necessità vitali che da lui stesso sono scaturite e che in maniera quasi eroica nel loro primo instaurarsi hanno potuto vedere la luce. Scrive infatti Ortega:

En mí opinión, toda necesidad, si se la potencia, llega a convertirse en un nuevo ámbito de cultura. Bueno fuera que el hombre se aclarara siempre reducido a los valores superiores descubiertos hasta aquí: ciencia y justicia, arte y religión. [...] La cultura nos proporciona objetos ya purificados, que alguna vez fueron vida espontánea e inmediata, y hoy, gracias a la labor reflexiva, parecen libres del espacio y del tiempo [...] Lo que hoy recibimos ya ornado con sublimes aureolas, tuvo a su tiempo que estrecharse y encogerse para pasar por el corazón de un hombre⁵⁵.

Una volta che l'individuo si sarà reso conto di ciò e avrà ripercorso le ragioni che hanno portato la realtà ad essere ciò che è sarà quindi possibile mettere in discussione i prodotti della civilizzazione che lo circondano, oppure farli propri qualora li si ritenga affini alla propria personalità che anche attraverso questa comprensione si costruisce: «[A]penas herida la retina por la saeta forastera, acude allí nuestra íntima, personal energía, y detiene la irrupción. La impresión es filiada, sometida a civilidad, pensada – y de este modo entra a cooperar en el edificio de nuestra personalidad»⁵⁶. Nel caso in cui si produca un rigetto esso sarà ad ogni modo sempre accompagnato ad una maggiore comprensione e alla consapevolezza dei contenuti positivi di ciò che si vuole costruire quale risposta a problemi avvertiti con estrema intensità dall'individuo che in prima persona cerca per essi nuove risposte⁵⁷. Dal punto di vista dell'esito politico né conservatorismo né riformismo emergono quindi da questo quadro quali possibili categorie sotto cui sussumere il pensiero orteghiano, il quale può essere definito piuttosto come un progetto di politica partecipativa, contraddistinta dal previo e necessario processo di rivitalizzazione razionale del dibattito pubblico,

⁵⁵ *Ibid.*, p. 755.

⁵⁶ *Ibid.*, p. 781.

⁵⁷ L'aspetto vocazionale dell'esecutività individuale gioca un ruolo fondamentale nella morale orteghiana. Per un approfondimento del legame tra vocazione personale e ragione vitale, articolata sia nell'ambito intellettuale che nella sfera dell'agire pratico, si veda, oltre allo studio classico in due volumi di J. Marías, *Ortega: circunstancia y vocación*, Madrid, Revista de Occidente 1973, tra gli altri L. Pellicani, *Antropologia ed etica in Ortega y Gasset*, Napoli, Guida, 1971. Utile inoltre il richiamo al libro di A. Savignano, *Radici del pensiero spagnolo del Novecento*, Napoli, La Città del Sole, 1995, in particolare alle pp. 21-25. Di grande utilità, infine, l'articolo di E. Ferrari Nieto, *Circunstancia y vocación*, «Anuario Filosófico», vol. XLII, n. 3, 2009, pp. 601-613.

dal momento che altrimenti «una cultura impresionista está condenada a no ser una cultura progresiva»⁵⁸ e in questo caso la democrazia non sarebbe che una parola vuota⁵⁹. Civilizzazione significa dunque progresso, in primo luogo della capacità individuale di attualizzare la propria libertà all'interno della vita sociale⁶⁰. È infatti sempre nell'individuo che Ortega situa il *prius* logico della sua dialettica tra soggettività e oggettività.

4. *Educazione e partecipazione. Alcuni accenni alla seconda navigazione*

La questione della partecipazione politica viene ulteriormente radicalizzata negli scritti degli anni '30 del filosofo spagnolo. Qui la problematica educativa viene a svolgere una funzione ancor più rilevante di fronte al coinvolgimento sempre più massivo della popolazione all'interno della vita pubblica⁶¹. La ben nota *Rebelión de las masas*, così come la *Misión de l'Universidad* e altri scritti composti intorno a questa decade si collocano infatti all'interno di un contesto in cui Ortega si stava interrogando con crescente assiduità sulla perdita del ruolo guida svolto dall'intellettuale in ambito culturale, ruolo che egli per sé rivendicava intorno al '14, non soltanto in Spagna ma in generale nell'intera Europa⁶². Infatti, ciò che l'intellettuale europeo sembra aver smarrito è in particolare la sua capacità, o incapacità, di contribuire a plasmare la coscienza individuale e collettiva dell'uomo medio: a tal riguardo egli sembra ormai del tutto ininfluenza. Un progetto di nuova Spagna e di una nuova Europa giace al fondo delle meditazioni di Ortega, in un disegno che nulla ha a che fare con la ricerca di una terza via rivoluzionaria o di una qualsiasi forma di nazionalismo, ma che procede invece lungo una direttrice di democratizzazione illuminata

⁵⁸ Ortega y Gasset, *Meditaciones del Quijote*, in *Obras Completas*, tomo I, cit., p. 785.

⁵⁹ Il giudizio sull'effettiva realizzazione di tale progetto espresso da Vicente Cacho Viu è però piuttosto negativo, non tanto per i demeriti di Ortega quanto per l'oggettiva impossibilità di tale propensione in questo senso esageratamente chisciottesca: «el cambio desencadenado entre las minorías cultas no tuvo su debido correlato en una acción educadora masiva, hecha imposible por la impermeabilidad del mundo officia y aun de amplios sectores sedicentemente tradicionales; monopolizador aquel, el Estado, de una enseñanza universitaria y, con el tiempo, de cuotas crecientemente importantes de la elemental obligatoria, y fuertemente implantados éstos, con pedagogías ya andadas a retirar, en los estudios secundarios». Cfr. Cacho Viu, *Los intelectuales y la política. Perfil público de Ortega y Gasset*, cit., p. 58.

⁶⁰ Cfr. Taberner del Río, *Filosofía y Educación en Ortega y Gasset*, cit., p. 126.

⁶¹ Sulla relazione tra educazione e civismo all'altezza degli anni trenta nella riflessione di Ortega si veda in particolare P. Scotton, *La formazione della pubblica opinione. Gramsci e Ortega a confronto*, «Lo Sguardo. Rivista di Filosofia», vol. III, n. 13, 2013, pp. 267-283.

⁶² Su questi aspetti si veda in particolare S. Cajade Frías, *Democracia y Europa en J. Ortega y Gasset. Una Perspectiva ética y Antropológica*, Tesis Doctoral, Directora de Tesis: Esperanza Guisán Seijas, Universidad Santiago de Compostela, Septiembre 2007, <http://dspace.usc.es/bitstream/10347/2419/1/9788498870411_content.pdf> (ultimo accesso: 10 dicembre, 2013).

che pone al centro l'intellettuale quale strumento di comprensione dei principi sociologici sottesi al vivere comune⁶³.

L'educazione risulta quindi essere sempre più il necessario ponte tra la realtà sociale e l'esperienza individuale e diviene pertanto sinonimo, in Ortega, di un'educazione alla politica – non certo intesa come politicismo spersonalizzante⁶⁴ – intrisa di un forte carattere normativo, talvolta utopico, che si esprime in una critica serrata al modello sociale della cultura di massa. Essa va quindi riformata, partendo da una riforma dell'educazione stessa. La funzione di tale modello educativo in un simile contesto dovrebbe quindi essere quella di costituire un argine alla massificazione della politica, non tanto limitando quest'ultima a ristrette élites quanto assistendo l'uomo medio nell'interiorizzazione della cultura, e il compito assegnato alla pedagogia dallo spagnolo diviene pertanto duplice: a) permettere di costituire quel fondo comune di valori condivisi all'interno del quale è resa possibile la convivenza sociale, in quanto costitutivo delle premesse che rendono di fatto possibile un discorso sulla politica da parte dell'uomo medio; b) rendere possibile la riforma costruttiva dell'insieme dei valori che determinano l'ideale politico nei momenti di crisi, vale a dire quando essi perdono quella ragione vitale che li sosteneva nel loro formarsi. Evidentemente si tratta di una forma di educazione indirizzata all'uomo medio, che deve sfuggire tanto l'ignoranza del bambino viziato che l'eccessiva specializzazione fine a se stessa dell'uomo di scienza: entrambi modi d'essere in cui si declina il diritto alla volgarità che priva il discorso politico di qualsiasi ragionevolezza⁶⁵. Nonostante l'inversione apparente nella rilevanza assegnata al piano oggettivo rispetto a quello soggettivo si tratta a tutti gli effetti di educazione e trasmissione del sapere, di certo non di propaganda. Questa dinamica solo accennata nelle *Meditaciones* – e che mostra notevoli affinità con la sociologia della conoscenza elaborata negli anni '60 da Berger e Luckmann⁶⁶ – risulta di certo più evidente e meglio articolata all'interno

⁶³ La differenza ontologica che intercorre tra politico e intellettuale non rende infatti possibile concepire che quest'ultimo svolga un compito politico in senso stretto. Su questo si veda in particolare l'interessante scritto di A. Brandalise, *Postfazione* a J. Ortega y Gasset, *Il politico*, Pordenone, Biblioteca dell'immagine, 1995.

⁶⁴ Secondo Ortega, infatti, il politicismo che fa di ogni attività umana un fatto pubblico priva drammaticamente l'uomo del contatto con la propria intimità, favorendo così le derive tipiche della società di massa. Si veda su questo Savignano, *Radici del pensiero spagnolo del Novecento*, cit., pp. 46-47.

⁶⁵ Ortega y Gasset, *La rebelión de las masas*, in *Obras Completas, tomo IV (1926-1931)*, cit., pp. 434-445. Per Ortega, l'uomo-massa, abituato a vivere in un mondo privo di difficoltà e quindi disabituato a porsi problemi tanto riguardo ai mezzi che ai fini da perseguire considera se stesso intellettualmente completo, non inferiore a nessun altro uomo e non vincolato ad alcuna norma limitandosi così a vivere in modo meccanico e privo di autoconsapevolezza.

⁶⁶ Troviamo infatti nel loro scritto più noto diversi passaggi il cui spirito risulta quanto mai affine a quello delle riflessioni orteghiane: «il rapporto tra la conoscenza e la sua base sociale è un rapporto dialettico, vale a dire, la conoscenza è un prodotto sociale e allo stesso tempo è un fattore di cambiamenti sociali». P.L. Berger, T. Luckmann, *La realtà come costruzione sociale*, Bologna,

del pensiero di Ortega ponendo l'attenzione ad alcune opere della maturità composte nel corso della sua cosiddetta seconda navigazione. Qui sono ulteriormente svolte le implicazioni del suo ragionamento, in particolare in relazione alla necessaria funzione politica della pedagogia stessa. È questo il caso, ad esempio, di *Ideas y Creencias*, scritto risalente al 1940, composto quindi in condizioni storiche e sotto influenze filosofiche del tutto differenti da quelle che avevano dato la luce alle *Meditaciones*⁶⁷. Si tratta di un testo in apparenza non concernente questioni educative, ma in realtà profondamente legato a questa problematica.

In esso, infatti, alcune delle riflessioni dalla *Misión* vengono approfondite e ampliate. Ad esempio, l'insicurezza propria del popolo spagnolo, per la salvazione del quale Ortega aveva composto il suo testo nel '14, diviene ora caratteristica propria dell'umanità nel suo complesso e costituisce la molla indispensabile che dovrebbe spingere gli intellettuali a forgiare nuove interpretazioni del mondo, vale a dire nuove idee per tracciare gli orizzonti di senso all'interno dei quali dovrebbe muoversi l'uomo europeo. In questo scenario fondamentale risulta la distinzione tra idee e credenze. Le idee sono infatti delle invenzioni, creazioni individuali e private, che tuttavia già si offrono pubblicamente e in maniera immediata nella vita quotidiana dell'uomo-medio sotto forma di credenze, di opinioni cristallizzate nel tempo. Quest'ultime, sebbene siano in questo senso dotate di maggior grado di realtà e siano di fatto più efficienti delle idee nel garantire la stabilità all'interno delle relazioni intersoggettive, tuttavia nel loro venire accolte come dati di fatto vengono percepite come del tutto esterne all'individuo e slegate dalla sua esperienza vitale⁶⁸. In quanto prodotti reificati della cultura le credenze sono imprescindibili per garantire ad ogni e ciascun individuo di condurre la propria esistenza, ma allo stesso tempo non godono di vita propria: per mantenersi in vita, per conservare la propria vigenza, esse hanno bisogno dell'accettazione collettiva che passa attraverso la previa interiorizzazione operata dal singolo, in forma anche a-razionale. Il compito dell'educazione alla politica è dunque quello di aprire alla consapevolezza dei principi che reggono il vivere sociale così da rendere

il Mulino, 1969, p. 125. Così, allo stesso tempo, l'identificazione delle credenze con la natura e quindi la loro indiscutibilità trova un parallelo assai interessante con i concetti di reificazione e conseguentemente di legittimazione come sviluppati dai due sociologi in questo stesso scritto, sebbene la finalità degli autori sia differente da quella del filosofo spagnolo.

⁶⁷ Per la necessaria periodizzazione del pensiero di Ortega nel corso del tempo in funzione soprattutto delle letture operate si veda ad esempio il testo classico di P. Cerezo Galán, *La voluntad de aventura. Aproximamiento crítico al pensamiento de Ortega y Gasset*, Barcelona, Ariel, 1984.

⁶⁸ «La concordia sustantiva, cimiento último de toda sociedad estable, presupone que en la colectividad hay una creencia firme y común, incuestionable y prácticamente incuestionada, sobre quién debe mandar. [...] Sin duda, las creencias fueron primero ideas, pero ideas que lentamente llegaron a ser absorbidas por las multitudes, perdiendo su carácter de idea para consolidarse en "realidades incuestionables"». Ortega y Gasset, *Del imperio romano*, in *Obras Completas, tomo VI (1941-1955)*, cit., pp. 92-93.

possibile il rispetto delle norme intersoggettive storicamente stabilitesi. Si tratta di favorire la riappropriazione della civiltà che la cultura dell'uomo europeo ha prodotto nel tempo, in modo tale da rivitalizzarla e comprenderla all'interno della propria personale esperienza di vita⁶⁹. Sembrerebbe quindi radicalizzarsi negli anni della maturità, pur in continuità tematica con la riflessione giovanile, un conservatorismo di fondo estraneo ai primi scritti del filosofo. Tuttavia si tratta solo di una sensazione. L'importanza assegnata allo sviluppo libero della personalità conduce infatti, nei momenti di crisi della cultura e quindi dello *status quo*, a valorizzare la capacità poetica, in tal senso *cervantina* ed eroica dell'individuo. Questa ritorna infatti ad essere determinante per avanzare nuove idee, nuovi esperimenti di assegnazione di valore e di senso al mondo esterno per mezzo della propria personalità che immagina scenari possibili⁷⁰. Il rispetto delle regole, delle norme sociali può infatti essere garantito soltanto dalla loro effettiva vigenza la quale, a sua volta, dipende dal grado di verità con le quali esse vengono percepite dalla generalità della popolazione⁷¹. Così la creazione di nuovi usi, necessaria per garantire continuità alla vita sociale, impone che l'efficienza del governo politico, secondo Ortega, sia posta in funzione della pedagogia la quale, come detto, deve sempre rivolgersi ad un duplice obiettivo: coltivare la spontaneità, al fine di garantire la possibilità del rinnovamento degli usi; favorire un'interiorizzazione dei prodotti della cultura da parte dell'intero corpo sociale attraverso l'influenza delle aristocrazie politiche nel formare razionalmente l'opinione pubblica.

In conclusione si può dunque affermare che il legame tra pedagogia e politica, che già all'altezza del 1914 caratterizzava l'impegno filosofico e giornalistico di Ortega, non si perse affatto nel corso degli anni e col maturare delle sue riflessioni, le quali alle *Meditaciones* si mostrarono invece sempre molto legate. Inoltre, tale preoccupazione nei riguardi della definizione e della pratica dell'educazione trovò una sempre più complessa articolazione in molti dei testi del filosofo madrileno, e non solo in pochi e sporadici scritti esplicitamente rivolti alla questione educativa. Così, nell'evoluzione del suo pensiero la questione spagnola rimase sempre il motore della sua riflessione, poiché fu a partire dall'invertebrazione della propria nazione, da questa sua personale circostanza,

⁶⁹ Si veda a tal proposito P. Cortés Rodríguez, *Barbarie y especialismo a partir de "La rebelión de las masas"*, in J. San Martín, T. Domingo Moratalla (edd.), *Las dimensiones de la vida humana. Ortega, Zubiri, Marías y Laín Entralgo*, Madrid, Biblioteca Nueva, 2010, pp. 103-109.

⁷⁰ «Il mondo delle 'idee' è un mondo immaginario, costruito ad hoc per rispondere alle difficoltà ed al mistero del mondo; tuttavia, nel suo essere immaginario, questo mondo è inserito nella 'reale' esistenza dell'uomo. Del resto, le stesse proposizioni e teorie scientifiche sono 'immaginarie' come i prodotti poetici o drammatici: cambia però il loro rapporto con la realtà fattuale». Così, nel suo commento a tale scritto orteghiano, scrive J.C. Lévêque, *Forme della ragione storica. La filosofia di Ortega y Gasset come filosofia europea*, Torino, Trauben, 2008, p. 183.

⁷¹ Per un'interpretazione del concetto di uso e di quello di vigenza in Ortega si veda in particolare M.I. Ferreiro Lavedán, *La teoría social de Ortega y Gasset: Los usos*, Madrid, Biblioteca Nueva, 2005.

che egli poté strutturare una più ampia proposta educativa, seppure col passare degli anni la dimensione spagnola non costituì più il fine della sua attività pubblica. L'educazione proposta da Ortega cercò sempre di salvaguardare la vita individuale, rendendola il necessario punto di partenza della convivenza sociale. Egli fece così discendere i meccanismi regolatori della società dalla concretezza dell'esistenza stessa, scorgendo di conseguenza nell'apporto alla vita pubblica di uomini e donne educati lo strumento indispensabile per evitare possibili derive populiste nell'esercizio del potere politico.

History of emancipatory worldview of Muslim learners

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ABSTRACT: Acquiring the knowledge to serve the people is the main theme of knowledge and Education in Muslim perspective. Historically this is rooted and integrated with knowledge and education. While Islamic education has been introduced all levels of education at present time, its graduates are not satisfying the Muslims' expectations in terms of achievement such as having a sense of complementing each other, ability to manage personal affairs as well as to manage the social and state affairs competently. This paper argues that this failure is the result of their intellectual poverty, and it will be resolved if the authority of contemporary Islamic education integrates Islamic epistemological views with the contents of education. This paper depicts history of emancipatory worldview of Islam to shape modern Muslims' epistemological view. The conceptualization of this history is founded on the syntheses of the history of education of past Muslims, their practices of teaching and learning, goal of the Quran as a content of education, prophet's services towards his fellow people. Therefore, in order to empower the Muslim learners with the capacity to emancipate the human, this paper suggests looking back to the history. Then only Muslims will succeed to benefit the world otherwise they may fail to do so. The history that is discussed here will affect the attitude of Muslim learners to other contemporary civilizations, teaching learning practice. While emancipatory worldview is quite a sociological subject matter in order to model it, this paper explains from the history, the Quran's illustrations regarding role and position of Muslims in this world, prophet's manner as an educationist, value system rooted in Muslim contents, and foundation of Muslim education. This paper finds that the emancipatory worldview can be propelled among the Muslims if the current pedagogy acts as a moderator between the content and the history.

EET/TEE KEYWORDS: Islam; Principles of Education; Learning Process; Malaysia; Seventh Century.

Introduction

A general observation on the graduates of Islamic integrated education institutions in Malaysia has revealed that Muslim learners are not satisfying the social expectations in terms of performance such as having a sense of complementing each other, ability to manage personal affairs as well as to manage the social and state affairs competently. The contributing fact behind this intellectual poverty may be the worldview of the graduates while the purpose of the education is to instil the worldview¹. This condition has happened in the Muslim learners when the worldview has been corrupted in educational contents.

Merely, the Islamic subject matter cannot resolve the issue of worldview. So, the authors' general observation is that the emphasis on religious subjects taught in the schools did not yield much benefit in terms of Muslim development. On top of that, in most Muslim countries, the essence of the school curriculum is dichotomous². The curriculum is either too religious such as Islamic education, or too secular such as conventional education. In practice, the Islamic education primarily consists of and founded on knowledge of the Quran, Hadith, Fiqh, Aqidah, Arabic etc. Though this knowledge is essential for every Muslim it is not enough to empower the learners with the ability to serve the world³. In addition, the concept associated to goal and objective of education in Islam may not be possible to achieve through the current curriculum offered by education system because they are loosely integrated. Ignoring the history of education of early Muslims in some institutes of Malaysia, Islamic subjects and conventional subjects are taught together (in a day, but different time, for example, in the morning and afternoon)⁴ and the teachers think that this education will change the learners. While indeed, education and Knowledge must be founded upon the Islamic epistemology. In the past Islamic education integrated Islamic epistemology with the body of conventional knowledge and

¹ S. Baba, *The Integrated approach in Malaysian Education: The International Islamic University Malaysia as a Model*, «Jurnal Pendidikan Islam», vol. 13, n. 2, 2004, pp. 87-99; R. Hashim, *Intellectualism in Higher Islamic Traditional Studies: Implications for the Curriculum*, «The American Journal of Islamic Social Sciences», vol. 24, n. 3, 2006, pp. 92-115; S. Hussien, *Critical Pedagogy, Islamisation of Knowledge and Muslim Education*, «Intellectual Discourse», vol. 15, n. 1, 2007, pp. 85-104; S.E. Krauss et al., *Religious Socialization Among Malaysian Muslim Adolescents: A Family Structure Comparison*, «Review of Religious Research», vol. 54, n. 4, 2012, pp. 499-518.

² R. Hashim, *Educational Dualism in Malaysia Implication for theory and Practice*, Kuala Lumpur, Oxford University Press, 1996, p. 204.

³ A. Izetbegovic, *The Islamic Declaration: A Programme for the Islamization of Muslims and the Muslim Peoples*, Sarajevo, [s.n.], 1990.

⁴ A.F.A. Hamid, *Islamic Education in Malaysia*, Singapore, S. Rajaratnam School of International Studies, 2010-Ministry of Higher Education (Preliminary Report: Malaysia Education Blueprint 2013-2025), 2012.

education also instilled supreme values and interactive values in the mind and practice of people⁵.

In this context, this paper will address the principles, foundations, and methodology relating to concept and practice of integration of epistemology in knowledge and education. In addition, it will explain the historical idea of the epistemological foundation of Muslim learners as it was based on emancipatory worldview. The issue of acquiring knowledge is no important than the issue of emancipate the humanity although in almost every book of Islamic education it is mentioned that «acquiring knowledge is essential for Muslim male and female». In the history, education was considered as a means of solution to problems prevailed in the Muslims. Thus we started the discussion of emancipatory worldview of Muslim learners as derived from the resources Muslims had. In contrast of our attempt, the Malaysian education system, for example, introduced all over the country integrated education institutions five decades ago⁶. Yet the output of these integrated education institutions needs to be discussed in the context of graduates' personality and impact on the society⁷. In this case, we argue that the missing dimension in Malaysian education is the unexplored emancipatory worldview among the learners.

1. *Worldview, motivation and education*

Worldview motivates to act in a certain way. The problems relating to the outcome of graduates of Islamic education may be linked with the lack of achievement motivation as it is a prerequisite for success⁸. Motivation is the process of stimulating and arousing one's behavior, giving direction to behavior and sustaining the reinforced behavior. «It has been hypothesized as one of the driving forces for the development of the nation and considered as a mental 'virus' which causes individuals to be competitive, hardworking and have more persistence»⁹.

⁵ S. Baba, *Integration and Collaboration in Education and Learning*, Kuala Lumpur, Yayasan Ilmuwan, 2013.

⁶ R. Hashim, *Educational Dualism in Malaysia: Implication for theory and Practice*, Kuala Lumpur, Oxford University Press, 1996; Id., *Intellectualism in Higher Islamic Traditional Studies: Implications for the Curriculum*, «The American Journal of Islamic Social Sciences», vol. 24, n. 3, 2006, pp. 92-115.

⁷ M.K. Hassan, *A return to the Qur'anic Paradigm of development and integrated knowledge: The Ulu al-Albab model*, «Intellectual Discourse», 2010, vol. 18, n. 2, pp. 183-210.

⁸ C. Shekhar, R. Devi, *Achievement Motivation across Gender and Different Academic Majors*, «Journal of Educational and Developmental Psychology», vol. 2, n. 2, 2012, pp. 105-110.

⁹ H. Elias, W. Rafael, A. Rahman, *Achievement Motivation of University Students*, «Pertanika Journal of Social Science and Humanities», vol. 3, n. 1, 1995, pp. 1-10, cit. from p. 2.

In addition, achievement motivation is linked to personal epistemology belief¹⁰. Epistemology is concerned with the origin, limits, nature, and validation of human knowledge. In recent studies, we have found the recognition that individuals develop a personal epistemology and that affect the degree of motivation to initiate in worldly affairs¹¹. While epistemological belief causes less motivation, actually Muslims as the *Khalifa* (representative) of Allah should not be less motivated in worldly affairs and nation building. As Allah says in the Quran:

So lose not heart, nor fall into despair: for ye must gain mastery if ye are true In Faith (Ale-Imran, 3:139).

The recent Muslim scholars have tried to find the problems behind the phenomenon. They discovered disintegrated education in Muslim countries. Therefore, recent Muslim educationists have provided a framework to motivate Muslim learners and students towards better condition by the names of Islamization of Knowledge¹², Islamization of education¹³, eclectic model¹⁴, disciplining mind and soul etc.¹⁵ In these methods of integration, the basic efforts have been put in the point that knowledge comes from the Almighty Allah, and this constitutes the epistemology of Muslim education and knowledge. Despite the constant efforts on epistemological integration still there are many things to do to improve the learners. We justified in the following sections that the statement «Almighty Allah is the source of knowledge» this cannot direct the learners to be motivated to serve the world. Beside this approach, the

¹⁰ R. Ricco, S. Schuyten Pierce, C. Medinilla, *Epistemic Beliefs and Achievement Motivation in Early Adolescence*, «The Journal of Early Adolescence», vol. 30, n. 2, 2009, pp. 305-340.

¹¹ M.T. Mohamed, M. El-habbal, *The Relationship between Epistemic Beliefs and Academic Performance: Are Better Students always More Mature?*, «Journal of Educational and Developmental Psychology», vol. 3, n. 1, 2013, pp. 158-172; Ricco, Schuyten Pierce, Medinilla, *Epistemic Beliefs and Achievement Motivation in Early Adolescence*, cit.

¹² I. Ba-Yunus, *Al Faruqi and Beyond: Future Directions in Islamization of Knowledge*, «The American Journal of Islamic Social Sciences» vol. 5, n. 1, 1988, pp. 13-28; I.R. Faruqi, *Islamization of Knowledge: General Principles and Workplan*, 3rd ed., Herndon, IIIT, 1997, pp. 1-134; I.R. Faruqi, *Islamization of Knowledge: Problems, Principles and Prospective*, «Islam: Source and Purpose of Knowledge», Herndon, IIIT, 1988, pp. 13-64; R. Hashim, I. Rossidy, *Islamization of Knowledge: A Comparative Analysis of the Conceptions of Al-Attas and Al-Faruqi*, «Intellectual Discourse», vol. 8, n. 1, 2000, pp. 19-44.

¹³ A.A. AbuSulayman, *From Islamization of Knowledge To Islamization Of Education*, «American Journal of Islamic Social Science», vol. 16, n. 2, 1999, pp. 1-4.

¹⁴ T.J. Al-Alwani, *Outlines of A Cultural Strategy*, London, IIIT, 1989; N. Othman, K.A. Mohamad, *Eclectic Model in the Malaysian Education System*, «International Education Studies», vol. 4, n. 4, 2011, pp. 111-117.

¹⁵ S.M.N. Al-Attas, *The concept of Islamic education*, in *The First World Conference on Muslim Education*, Makkah, Hodder and Stoughton, 1977; S. M.N. Al-Attas, *Aims and objectives of Islamic education*, Jeddah, Hodder and Stoughton, 1979; Hashim, Rossidy, *Islamization of Knowledge: A Comparative Analysis of the Conceptions of Al-Attas and Al-Faruqi*, cit.

emancipatory approach needs to be included in education as an epistemological base.

Regarding the problem among the Muslim learners, it originated from the lack of clear worldviews and this lacking generates many other problems. The problems transcended the learners themselves and affected the institution's goal, practice and contents. For example, firstly, in some of the Islamic education institutions memorization is practiced and more emphasized¹⁶. It has been observed that the learners of the Quran i.e. students of Islamic education systems and institutions cannot show their action in line with the teaching and essence of the Quran. Secondly, nowadays the education institution is emphasizing more on marketization of education. As a result of that, education became value free and merely worldly oriented¹⁷. As a consequence, the educated people do not lead the ethical life, and they ignore religious belief, moral attitude etc. Thirdly, now Muslims are concentrating more on knowledge on how to manage religious-personal affairs such as knowledge of *Aqidah*, *Ibadah*, *Akhlaq* etc. They focus less on knowledge how to serve the world. As a result, they have become the consumer of others' products. They do not possess any technology to manage natural resources gifted by Allah, such as oil, underground water, uranium, gas etc. but lacking human capital and resources Muslims cannot manage those resources.

2. *Influence of worldview in building civilization*

When we learn and emulate from our Muslim civilization in the past we find the following features:

1. The synergy between the political leaders and the Muslim scholars;
2. Integration of revealed knowledge to the conventional knowledge;
3. Learning of comparative advantages from other civilizations.

The centre of these features is the application of knowledge in the path of solidarity and serving humanity. As a consequence, the role of the political leaders in the early days of Muslim history contributed to the establishment of Muslim empire and development of Muslim civilization. While the leaders

¹⁶ G. Hardaker, A.A. Sabki, *An insight into Islamic pedagogy at the University of al-Qarawiyyin*, «Multicultural Education Technology Journal», vol. 6, n. 2, 2012, pp. 106-110; A.A. Sabki, G. Hardaker, *The madrasah concept of Islamic pedagogy*, «Educational Review», vol. 65, n. 3, 2012, pp. 342-356.

¹⁷ Hassan, *A return to the Qur'anic Paradigm of development and integrated knowledge: The Ulu al-Albab model*, cit.; S.M. Natale, C. Doran, *Marketization of Education: An Ethical Dilemma*, «Journal of Business Ethics», vol. 105, 2012, pp. 187-196; G. Whitty, S. Power, *Marketization and privatization in mass education systems*, «International Journal of Educational Development», vol. 20, 2000, pp. 93-107.

maintained the polity, economy and geophysical development of the Muslim nations, the Muslim scholars worked towards the development of intellectual and spiritual needs of the nation via knowledge building. The scholars helped in developing the golden age of Islam through great works of scholarships that brought great fame to Muslim scholars in various fields of knowledge, technology and innovation later.

The above features were resulted from the worldview was the integration between revealed and the acquired knowledge. Muslims were required to practice the teachings of Islam and its values in all aspect of everyday life from simple things like respecting time by being punctual to management assets. Man is a social being. We cannot live alone and separate from our own kind. Societal living requires rules so that society will be harmonious and peaceful. Muslim civilization is an evidence of successful implementation of integration of Islamic teaching – the revealed knowledge with that of new and contemporary knowledge be it technology, astronomy, psychology, medicine, biotechnology or geology.

For instance, in the history of the first revelation of the Qur'an, it mentioned the word «read» which indicates the essence of Islam is about knowledge. A good Muslim is a knowledgeable Muslim. The word «read» also denotes scholarships and how Islam promotes learning, educating, coaching. Islamic knowledge was based on the revealed knowledge of *Al Qur'an*, and its best interpreter was the Prophet. All his words and deeds were that of the interpretations and culminations of what is the teaching of Islam is all about. This in turn became the *Al Hadith*. Learning happened to them from reading and interpretation of texts. This character emphasized on tradition of scholarships in the Muslim civilization.

Another impact of the worldview of past Muslim civilization is learning of «comparative» advantages from other civilizations. The early Muslim pioneers began to pick and choose what was best and assimilated it to the Muslim framework of knowledge building. Those initiatives had led towards the integration of Islamic knowledge and possibly it was the first effort to establish the movement of Islamization of knowledge among the scholars. Islamic state began to expand with the expansion of other lands and people. This led Muslim to learn, adopt, adapt and use the best available technology, knowledge, techniques, business processes, trade, rules, polity, judicature, art, games, design, construction technique, warfare, weaponry, engineering, architecture, education systems, languages, agriculture, medicine, food production and irrigation techniques.

3. *Identifying worldview from agents of Muslim education. Past teaching and learning process*

The essence of Quranic teachings was not only memorization, but also understanding; it developed the ability to articulate the memorization and understanding. In addition, learning requires internalizing which is more difficult, and then what a learner had internalized in his mind and heart enabled him to manage self, and to manifest them into *amal* ('action')¹⁸. In the Quran, we find that knowledge and education do not take place without the true process of teaching and learning. The first revelation of the Quran was *Iqra'* i.e. to read. When *Jibril* ('Gabriel') came to the Prophet in the cave Hira he mentioned to the Prophet many times to «read». By this event, the process of teaching-learning started in the life of the Prophet. The Prophet memorized the part of the Quran revealed by *Jibril*. Then he understood the verses of the Quran and internalized the meaning. He always tried to articulate himself in order to ensure that whatever he memorized is perfect and in the line with Allah's will. After this, he used to internalize the meaning and essence of the verses into his life. Later, he practiced every teaching of the Quran in daily life and put into action. From this process maintained by the Prophet, we understand that the aim of Muslim's teaching learning was the manifestation and performance.

History has proven that the Muslims' education in the past was founded upon the goal of innovation. For example, they started with memorization and then they used to understand it. They continued to articulate it and internalize it. Finally they manifested their knowledge in the form of producing a system, which we call innovation, creativity, and discovery¹⁹. Muslim scholars like Ibn Sina and al Khawarizmi for instance had memorized the al Quran when they were eight and ten years old respectively. After memorization, they did not stop understanding the meaning of the Quran. Even they continued to ponder the essence of the Quranic verses. They also articulated the knowledge of the Quran in different branches such as *fiqh* ('law'), *tafsir* ('exegesis') and languages etc. These helped them to acquire knowledge to serve the people. In fact, this knowledge was the prerequisite of other kinds of knowledge. They then proceeded to learn logic, philosophy, astrophysics, mathematics, science, medicine and others, which are essential in serving the people. The same can be observed in al Battani (D. 929 AD), Abbas Ibn Farnas (D. 887 AD), Al Zahrawi

¹⁸ S. Baba, *The Integrated approach in Malaysian Education: The International Islamic University Malaysia as a Model*, «Jurnal Pendidikan Islam», vol. 13, n. 2, 2004, pp. 87-99.

¹⁹ S. Baba, *Integrated Knowledge in the Tawhidic Curriculum*, «Muslim Education Quarterly», vol. 17, n. 2, 2000, pp. 14-26; Id., *The Integrated approach in Malaysian Education: The International Islamic University Malaysia as a Model*, cit.; Id., *Tajdid ilmu dan pendidikan*, Kuala Lumpur, Techknowlogic Trading, 2011; Id., *Issues and Challenges in Islamic Studies at ASEAN universities in the Era of Globalization: The Needs for Collaboration among Islamic Universities*, «JAWI: Journal of Southeast Asia Islamic Contemporary Issues», vol. 1, n. 1, 2013, pp. 19-30.

(D. 1013 AD), Ibn Nafis (D. 1288 AD), Ibn Haitham (D. 1040 AD), al Biruni (D. 1048 AD) and many others. They initially pursued the knowledge to correct their personal affairs so that they become God conscious and they studied the al Quran as a source of guidance to explore further and develop the knowledge to emancipate the people²⁰.

Therefore, we can argue that the typology of teaching and learning such as memorization, understanding, articulation, internalization, and manifestation is indicative to the purpose of education²¹. So, if the teaching and learning process is partial, incomplete, and is made by expert teachers the end product that means the students will not be able to portray the worldview in their daily life.

Another way to understand the Muslim learners' worldview is through the historical contribution of the Quran while it said to incorporate *tadabbur* ('continuous thinking'), *tafakkur* ('careful thinking'), *Fikr* ('cognition') and *Zikr* ('articulation')²². These terms are mentioned in the Quran in the following chapters and verses: Anbiya-10, 67, Muminun-80, Qasas-60, Saffat-138, Ale Imran-65, Baqara-170, 171, Maidah-58, Yunus-42, 100, Zumar-43, Hujurat-4, Yasin-68, Baqara-219, 266, An'am-50, Ale Imran-191, A'raf-176, Yunus-24, Hashar-21, Nisa-82, Muhammad-24.

The philosophy of these terms is to utilize the human cognition in implementing the injunctions and orders of the Quran. Human cognition must be based on the proper understanding of resources so that it can guide people to think and understand. Then Islamic teachings will be internalized and manifested properly. However, in the context of the education process in Islam, 'memorization' is the cognitive process and heart feeling to receive ideas and principles from guideline of *syariah* and Islamic teachings then transferred to long-term memory to be stored and will be called back to the time required. «Understanding» refers to the process of thinking with a strong cognition, feeling in the heart that will bring to complete meaning of the ideas and will guide to know the real nature and unseen (*ghaibiyyat*) to be closed to the Creator. «Articulation» is a way of thinking to find out the truth that will lead to an understanding of the difference between right and wrong, good and bad, useful and usefulness, and so on. It is a process to seek the wisdom (*hikmah*) of the knowledge received in the form of facts, experience, point of views, and events in life. «Internalization» is the process of connection between the logical mind, heart feeling, and entire body to receive and to absorb the meanings and principles as own characters. It will relate the process of *fikr* and *zikr* to establish awareness and willingness within factor of creed, worship, *sharia* and

²⁰ Baba, *The Integrated approach in Malaysian Education: The International Islamic University Malaysia as a Model*, cit.

²¹ Baba, *Tajdid ilmu dan pendidikan*, cit.

²² S. Baba, *Fikir dan Zikir*, Selangor, Dewan Bahasa dan Pustaka, 2009.

moral characters. «Manifestation» is the actual characters in the life that based on a comprehensive understanding and knowing the wisdom to present good conduct (*akhlaq*) and righteousness deeds within the society²³. These steps were followed in the past. The sequential method of the education in the past resulted in the motivating factor of worldview.

The above description of the Quranic methodology of teaching and learning leads to emancipate in two ways. Firstly it develops the 'well equipped individuals' and then secondly it empowers them with the power to maintain *amanah* ('obligations') of Allah. Finally, They control and take care of the system as the *Khalifa* ('representative'). Here self development occurs in a complex process. Self is called *nafs* ('self') in Arabic. Self is the combination of *aql* ('cognition'), *nafs* ('self') and *ruh* ('spirit')²⁴. Allah gave human knowledge by which human can improve his self. For the development of *ruh* Allah revealed *Wahyu* ('revealed guideline'). With the combination of conventional knowledge and revelation human perform *amal* ('action'). So, *amal* is outer or physical expression of human. In brief, development of self derived from *Deeniyyah* ('religious') knowledge. When outer activities or *amal* is based on good manners, and ethics we call it *Akhlaq* ('character').

Similarly, Allah sent Muhammad as His Prophet and He started with the revelation of *Wahyu*. Then Allah developed the *Akhlaq* of the Prophet and thus the Prophet became the *Qudwah* ('model'). The same should be applied in school. So we have to determine what kind of knowledge the school is teaching, what kind of teacher is teaching, what is the effect of knowledge and teacher on the students' mind, thought, and *akhlaq*.

Based on the methodology of Allah, we can say that development of men relies on the development of self and person. Once the self of an individual becomes developed, his role is to perform the duty of *khalifah*. Allah made human as His *khalifa*. The role of *khalifa* is to improve himself based on the above outline. When human becomes well-developed, he takes *taklif* ('responsibility'). Having *taklif* means human has to find a way to serve fellow human being. In early Muslim history, Muslim combined firstly, knowledge of science and technology, secondly ethics of utilization, and thirdly, Knowledge of comparative advantages.

²³ P.W. Airasian, K.A. Cruikshank, R.E. Mayer, P.R. Pintrich, J. Raths, M.C. Wittrock, *A taxonomy for learning, teaching, and assessing: A revision of Bloom's taxonomy of educational objectives*, ed. by L.W. Anderson, D.R. Krathwohl, New York, Addison Wesley Longmann, 2001.

²⁴ M.N.A. Salam, *Al-Ghazzali On Disciplining the Self*, ed. by S.H. Nasr, Chicago, Great Books of the Islamic World, Inc., 2010.

4. *Moral values and ethics*

The education and content of knowledge were value laden, not value free. In Muslim perspectives, source of ethics was the Quranic values²⁵. Without the knowledge of value learners cannot employ ethics, because ethics is derived from values. In order to develop a civilization, learners have to maintain certain standard i.e. Islamic ethics, values and morality²⁶.

So, value based education will remind the students about their duties and responsibilities towards themselves and others²⁷. Therefore, the students must possess value which should be expressed in their daily activities. Muslims believed that on the Day of Judgment Allah would ask them not only about self activities but also about the resources He has given them as Allah mentioned in the Quran (in *chapter al-Takasur*):

Then, shall ye be questioned that Day about the joy (ye indulged in!).

This value is the pillar of worldview. As a result of the worldview, whenever they produce goods they will do it for the benefit and welfare of the human. They will consider the technology as the means, not the end. If they fail to produce goods, at least they will use the technology for the good end, and ethical purpose. When they learn conventional sciences, they will learn it with the epistemological base. As a result of learning science with epistemological base students will know that human is responsible as the *Khalifa* ('representative of Allah') for its distribution, consumption, utilization.

Another historical value in Muslim education is *adab* ('discipline'). Actually, *Adab*' refers to disciplining the soul and body, mind and action²⁸. It says that if the content of education and curriculum is erroneous it will not be effective in producing well disciplined man. The end of education in Islam is to produce a good man, and not to produce a good citizen. By 'good' in the concept of the good man is meant precisely the man of *adab* ('discipline') in the sense here explained as encompassing the spiritual and material life of man²⁹. Thus the goal of education in Islam is to produce *well developed men* having *adab* who

²⁵ Baba, *Tajdid ilmu dan pendidikan*, cit.; M.H. Al-Migdadi, *Issues in Islamization of Knowledge, Man and Education*, «Revue Académique des sciences humaines et sociales», vol. 7, 2011, pp. 3-16.

²⁶ A. Hassan, A. Suhid, N.Z. Abiddin, H. Ismail, H. Hussin, *The role of Islamic philosophy of education in aspiring holistic learning*, «Procedia – Social and Behavioral Sciences», vol. 5, 2010, pp. 2113-2118; Izetbegovic, *The Islamic Declaration: A Programme for the Islamization of Muslims and the Muslim Peoples*, cit.

²⁷ S.A.A. Mawdudi, *Towards Understanding Islam*, ed. by K. Ahmad, 3rd ed., Karachi, UKIM Dawah Centre, 1960.

²⁸ Al-Attas, *Aims and objectives of Islamic education*, cit.

²⁹ Al-Attas, *The concept of Islamic education*, cit.; Id., *Aims and objectives of Islamic education*, cit.

are able to serve in micro level and macro level. The objective of the learning in Islam was to instil the worldview of Islam into the mind of learners, to produce holistic man – a good man and also a good citizen. The purpose of knowledge and education was to establish discipline, which is the essence of «education».

In order to put knowledge and education on a proper epistemological foundation at present time, we have to investigate:

- a. The kind of knowledge taught to the children and students;
- b. The kind of education that has been given to them when the students are taught *deen* (‘religious’) knowledge;
- c. The effect of teaching learning process on the children in terms of achieving *adab* (‘discipline’), and worldview by which they can lead a moral and ethical life.

5. *Emergence of emancipatory worldview*

The Muslim worldview emerged from the demand of *Ihsan* (excellence). Muslims were to achieve this excellence in personal self and social relationship. In English, the self is called as individual characteristics, including personality, abilities, etc.³⁰ The centre point of self is *taqwa* (God fearing) and personal salvation on the Day of Judgment. According to Al-Ghazali as it is explained by Salam:

Self consists of three fundamentals: the same three fundamentals confirmed by modern psychology and scientific studies-affect, behavior and cognition (the ABC of psychology). The first fundamental is knowledge (cognition, awareness or consciousness). The second he calls states (affect or emotion) that that knowledge or awareness produces in us. The third he calls act or deed- the action that results from our emotion that came from our knowledge or awareness of something³¹.

The term «system» in English is as «method» – a way or method of doing things³². We mean by «system» a group or combination of interrelated, interdependent, or interacting elements forming a collective entity; a methodical (i.e. systematic) or coordinated assemblage of parts, facts, concepts, etc. for instance economic, social, political, education systems. In fact, Allah blessed us with the wealth and it demands systems to manage them. Similarly, they needed knowledge to develop a system to manage the blessed resources and

³⁰ E. Walter (ed.), *Cambridge Learner's Dictionary*, 2nd ed., Cambridge, Cambridge University Press, 2004.

³¹ M.N.A. Salam, *Al-Ghazzali On Disciplining the Self*, ed. by S.H. Nasr, Chicago, Great Books of the Islamic World, Inc., 2010, p. 7.

³² Walter (ed.), *Cambridge Learner's Dictionary*, cit., cfr. *ad vocem*.

so that the systems benefit the human being, build the civilization, and make life easy and establish control over indiscipline, chaos, disorder, confusion etc. They understood the core of adopting system is the benefit of human kind, independence from the others.

Muslim constructed the idea of ‘system’ by looking at the verses of the Quran regarding *Ihsan* (excellence), community services, social and personal rights given by the Islam, and so on. It is stated in the Quran:

[...] do good as Allah has been good to you [...] (al-Qasas: 77).

Then shall anyone who has done an atom’s weight of good, see it! and anyone who has done an atom’s weight of evil, shall see it (Zilzal: 7-8).

The above verses formed the concept of systematic social work among Muslims. It was, however, more than a philosophical concept, but a practical draft, even we believe that the social work is a part of *Ibadah* (worship) as Muslim consider them necessarily ‘an obligation’ like prayers and fasting. It seems that many are not aware of the Quranic basis for the duty to serve human beings. There are many verses in the Quran that deal with the necessity of social service: 107; 74:38-46; 90:12-18; 89:17-24; 92:5-10. The more prominent one is the chapter *Al Ma’oon* in which Muslims were divinely mandated to attend to the social needs of others, not as a philanthropic gesture, but as a prerequisite condition for faith (*Iman*) itself, and a tangible acceptance of the Hereafter. In *al-Ma’oon* 107:1-7, Allah said: «Have you ever seen a human being who contradicts the (essence of) faith? That is the person who pushes the orphan aside and does not promote feeding the needy». As the *khalifa* of Allah, Muslims had to invent comprehensive and effective social work and services. The significance of social work led the Muslims to think about acquiring knowledge to develop a system for serving others.

At current time, education systems in Muslim countries like *madrasahs* are not encouraging to promote the concept of *Ihsan* in real life. Instead, they are focusing more on knowledge of how to manage self – such as belief on Allah, *Aqidah*, *Ibadah*, how to perform *Salat*, *Siyam*, *Hajj* etc. Though these are the very basic of *Deen*, Other than *Ibadah* and *Aqidah* we need the *Shariah* that contains rules and regulations, and so it requires other aspects such as values, ethics, and *Akhlāq*. If we measure the *Rubaniyyah* (spiritual) dimension of Muslims all over the world, we will find to some extent that the level is relatively high. But if we look at the *amal* such as the conduct, punctuality, and interpersonal relationship of Muslims we will find it relatively low³³. This indicates that the achievement from *Ibadah* and *Shariah* does not have an

³³ Baba, *Pendidikan Rabbani: Mengenal Allah melalui Ilmu Dunia*, cit.; Id., *Fikir dan Zikir*, cit.; Id., *Tajdid ilmu dan pendidikan*, cit.

impact on their practical and daily life. It happened in Muslims because they forgot the basic emancipatory worldview of Muslim education.

6. *Target of Shariah (Law)*

The target of *Shariah* is social service. Thus it is inclusive in nature. At early period of Muslims, the social service was also an Islamic obligation under *Shariah*. Allah said:

It is not righteousness that you turn your faces towards East or West; but it is righteousness to believe in Allah and the Last Day and the Angels and the Book and the Messengers; to spend of your substance out of love for Him, for your kin, for orphans, for the needy, for the wayfarer, for those who ask; and for the ransom of slaves; to be steadfast in prayers and practice regular charity; to fulfil the contracts which you made; and to be firm and patient in pain and adversity and throughout all periods of panic. Such are the people of truth, the God fearing (*al-Baqara: 177*).

While *maqasid Shariah* (intent of the law) concerns preservation of wealth, life, society and human resource it is important to save and protect human from any scarcity, shortage, imbalance, and problem³⁴. Islam combined *aqidah* (belief), *syariah* (law) and *akhlaq* into the whole of human life. This makes Islam a perfect religion to mankind. Generally known, *aqidah* is belief of Allah in all matter. Even Muslims have to believe on commandments of Allah. *Akhlaq* or ethic is based on His commandments. It is the spiritual value that can guide the conduct of mankind, whether right or wrong. *Akhlaq* or ethic in Islam is based on al-Quran and *Sunnah*. It is not only theoretical rather Muslims practiced it in their whole life too. Al-Quran and *Sunnah* did not describe the entire ethics in Islam directly. Most verses related to modern life and system in the Quran merely mention the basic rules in Islam while quotations from *Sunnah* explain how Muslims should conduct their life. *Sunnah* also guide Muslims to behave towards being a good person and beware that unethical behavior will result in negative impact or punishment³⁵.

Anything what was good was accepted as legal as well at that time. In Muslim terms *husn* means good, beauty and what is morally acceptable must be done. *Qubh* means bad, ugliness and what is morally reprehensible must not be done. However, man cannot identify what is the absolutely *husn* and *qubh* without referring to the al-Quran and the *Sunnah* in order to determine what is

³⁴ L. Amin, S.F. Sujak, S.N.S. Ramlee, A.L. Samian, M.S. Haron, M.N. Mohamad, *Educating the Ummah by introducing Islamic bioethics in genetics and modern biotechnology*, «Procedia – Social and Behavioral Science», vol. 15, 2001, pp. 3399-3403.

³⁵ *Ibid.*

husn and *qubh* and thereby resolving the above legal question. In contemporary issues that may not have any direct explanation in al-Quran and *Sunnah*, other Islamic sources like *ijma* should also be referred to when drawing up this code of ethics. Apart from that, Qawaid Fiqhiyyah is useful to strengthen the code to achieve the objective of *Syariah*³⁶.

Therefore, from the *Maqasid Shariah* ('intent of the law') perspective they inferred that systems for human kind should be derived from the *Quranic* and *Sunnatic* injunctions, principles and foundations. Whatever they did in order to extend and promote the higher intent of the Quran was accepted by the prophet. They believed that who were involved and engaged in inventing and systemizing the set of rules, regulations would be rewarded as well on the Day of Judgment.

7. Ultimate goal of education

Ultimate goal of education is to achieve the capacity manage all kinds of resources of life, to distribute them and benefit the human being. Allah endowed human with powers, and faculties. Man possesses intellect and wisdom, will, faculties of speech, sight, taste, touch and hearing, passions of love, fear, and anger and so on. These faculties have been bestowed on him because they are crucial to him. His very life and success depend on the proper use of these powers for the fulfilment of his needs and requirements. These Allah-given powers are aimed for his service, and unless they are used fully, life cannot become worth living. Allah has also provided human with all those means and resources to make his natural faculties function and to achieve the fulfilment of his needs in the world in which human lives. And there are other people living in his surrounding, so that they can co-operate with each other in the construction of a better and prosperous life.

Allah gave human these powers and resources so that they may be used for the good of others. The proper use of these powers is that which makes them beneficial to them. That alone is the proper utilization of these powers. Every other use, which results in waste or destruction, is wrong, unreasonable and unjustified. For instance, if someone does something that causes him harm or injury; it would be a mistake. If his actions harm others and make him a nuisance to them that would be the misuse of God-given powers. If you waste resources, spoil them for nothing or destroy them that too is a mistake.

Keeping this basic consideration in view, we see that Allah has given the code of behavior- the *Shari'ah*, which Allah has revealed to man. The *Shari'ah* is the law of Allah and provides guidance for the regulation of life in the best interests

³⁶ *Ibid.*

of man. Its objective is to show the best way to the man and provide him with the ways and means to fulfil his needs in the most beneficial way. It does not say to leave the world, give up all ease and comfort of life. Therefore, Allah will ask on the Day of Judgment about the proper utilization of what he gave us.

In order to be successful on that Day, the fundamental principle of the Law is that the man has the right, as well as he has duties to others – to himself, to Allah, to other creatures. *Shariah* is the combination of rights and obligations. The *shariah* perspectives mentioned above urge to human to seek knowledge to manage the life.

Islam regards knowledge and science as the common heritage of mankind. Muslims have liberty to learn them and to learn how to practically use of that knowledge. But as far as the question of the way of life is concerned, Islam forbids imitating the modes of living of other peoples blindly (*taqlid*). The psychological impact of imitation is that it creates a sense of inferiority, and it destroys its inner vitality, its vision³⁷.

Acquiring knowledge is equally important for success of self through worshiping the Lord Allah, and for the service of other fellow human being. From this obligation and responsibility perspectives we argue that the human must learn knowledge to benefit and serve human. Regarding benefiting the human, people and other civilization Allah says:

ye are the best of peoples, evolved for mankind, enjoining what is right, forbidding what is wrong, and believing In Allah. if only the people of the Book had Faith, it were best for them: among them are some who have Faith, but Most of them are perverted transgressors (ale-Imran: 110).

Therefore, Islamic knowledge works for the sake of emancipation of the entire human. It is not only to worship Allah but also to serve human. The following examples and points inform us the Islamic knowledge is founded upon emancipatory view:

1. Allah and Prophet mention about pondering the ‘why’ factors. Although, the Quran is the ultimate source of knowledge, it does not give us the answer of every question. The Quran consists of principles that are necessary for human. Man has to think, search, and find the answers of questions he needs. In the past Muslims like Ibnu Sina, al-Khawarizmi, Al-biruni, Abu Qasim al-zahrawi and others managed to integrate the knowledge of *shariah* into the knowledge to manage the system. They integrated both types of knowledge. Knowledge is of two types: *Ulum aqliyah* and *Ulum naqliyah*. *Ulum aqliyah* must be supported by *Ulum naqliyah*. Both are essential for the development of human and the system. While in the past Muslims managed to develop the civilization by their own expertise. Unfortunately, Muslims

³⁷ Mawdudi, *Towards Understanding Islam*, cit.

now a days concentrate more on *Ulum naqliyah* not in a wider scope, and they think that it will help them to achieve success in this world and the life of hereafter. If we look at the curriculum of *madrasah* today, we see that they do not include habit of pondering, inquiring, developing database. While in the Quran Allah says *yatafaqqarun, ya'qilun, yatadabbarun* etc. Al-Quran does not explain only 'what' factors but also 'why' factors. In order to understand the essence of *ulum naqliyah* and apply those in this worldly life Muslims must have to concentrate *Ulum aqliyah*.

2. Human is the *Khalifah* of Allah. As a *Khalifa*, he has to take the responsibility of others. Allah says '*Inni Jailun Fil Ardi Khalifa*' (al-Baqara: 30). Meaning of *Khalifa* implies to be a manager, leaders and so on. So *Khalifa* must have the ability to manage self and system. How can that be applied to the system, for example, to that of the university, school, and colleges? Besides other systems include social system, political systems, system for managing human resources, mineral resources, transportation, communication, finance, economy, and business. As a *Khalifa* of Allah, human will take education, which means they will combine *Tarbiyyah*, *Ta'lim* and *Ta'dib*. Islam asks to people to educate themselves in different fields as the means of building the kingdom of God (Allah) on earth³⁸. In addition explained function of education in order to play the role of *khalifa* as follows:

Literally, *Tarbiyyah* means 'educate', *Ta'lim* means 'knowledgeable' and *Ta'dib* derived from the word '*adaba*' means 'moral'. These terms comprehensively are concerning the multilateral relationship of human and their society; human and environment; society and environment; and in relation to Allah. These cross-sectional relations are all together represent the scope of education in Islam of both 'formal' and 'non-formal', comprising the *FardhuAin* and *FardhuKifayah*³⁹.

Conclusion, limitations and further research

While the root of emancipatory worldview for Muslim education is recognized in this paper, a strong strategically planning for its integration with the Muslim knowledge and education system needs be done through two phases: firstly, to put focus on students' manifestation not only on memorization. The assessment in the academic institution must be compatible to teaching and learning taxonomy such as Memorization, Understanding, Articulation,

³⁸ I.M. Hamm, *Islamic Perspective of Education and Teachers*, «European Journal of Social Sciences», vol. 30, n. 2, 2012, pp. 223-235.

³⁹ M.J. Salleh, *The Integrated Islamic Education: Principles And Needs For Thematic Approaches*, in *Singapore Islamic Education System-SIES Seminar*, Singapore, Wisma MUIS, 2009, pp. 1-13, cit. from p. 1.

Internalization, and Manifestation. Secondly, there must be research of the impact of teaching learning upon students. So we have to measure what kind of knowledge the school is teaching, what kind of teacher is teaching, what is the effect of knowledge and teacher on the students' mind, thinking, *akhlaq*. Without the integration of emancipatory worldview, the Muslim learners will not be able to serve the fellow being wholeheartedly – with the spirit of religion.

The purpose of this paper is not to explain the contribution of Muslims during 7th century. The main objective was to restudy the selected verses and prophet's practice with a new dimension in order to conceptualize emancipatory worldview of Muslim learners. The literature of Muslim philosophers between the 8th and 12th centuries was not studied in this paper. Literature of this period may evidently indicate the emancipatory worldview of the Muslim education. In addition, the Muslims may be interviewed and surveyed in order to explore and investigate the level of their agreement with this worldview. On top of that, current educationists may be interviewed to find the scope of this worldview in the contemporary Muslim education.

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Una nueva manera de interpretar los cuadernos escolares: las escrituras al margen

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A new investigation line for the study of the school exercise books: jotted notes in the margin

ABSTRACT: The Pedagogical Museum Center of University of Salamanca (CEMUPE) has an archive that contains approximately one thousand notebooks that have been classified according to different categories, the oldest one from 1868. Written materials that vividly show how schoolwork used to be and how it has evolved along the years. These school materials help us feel closer to past times, to everyday school practice when teaching children. They also allow us to get close to life outside the school, since they display all those components from the social, political or family sphere which students and schoolteachers found most interesting, and which were written on paper. From all these materials we are just going to make use of those pages which offer information directly related to two areas: one that is objective and rather formal, the explicit curriculum worked at school; and another one called subjective and sentimental. These two dimensions form the core content of this study which their authors have entitled "Jotted notes in the margin". In short, an attractive task tracing life and feelings in the notes written by infant hands, sometimes expressed like statements, or as part of the content of the lesson, and occasionally notes that are jotted in the margin; that is to say, unconventional writing, which does not follow curriculum content completely, but instead it escapes from the network weaved by legislation and the schoolteacher's habitus. Thoughts and feelings, these are the key issues. We will analyse, study and transfer a cultural background which is still valuable for present day school and the one to come in the near future.

EET/TEE KEYWORDS: School Culture; Primary School; School Exercise Books; Spain; XX Century.

Introducción

El Museo Pedagógico de la Universidad de Salamanca se inaugura oficialmente el 15 de mayo de 2007, adquiriendo un reconocimiento a su trayectoria por parte de la Universidad en julio de 2010, al avalarlo como Centro Propio con cobertura institucional (CEMUPE). En su constitución y evolución posterior siempre hemos partido de la premisa de que un museo educativo no es exposición ni coleccionismo, sino que ante todo quiere cumplir las funciones de docencia y de investigación. En este sentido, consideramos que el museo no debe ser sólo contenedor y preocuparse únicamente por captar fondos, por la salvaguarda y conservación del patrimonio histórico-educativo. No debe quedarse encerrado dentro de sus instalaciones ni limitarse a acumular conocimientos. La función del Museo es la de ser un Museo Comunicador, que dé a conocer y eduque con sus colecciones y contenidos mediante herramientas didácticas. Los conocimientos adquiridos sobre la cultura escolar deben ser puestos a disposición de la ciudadanía, para que el Museo pueda ser dialogante, salir fuera de las instalaciones, reformulando la relación con el entorno próximo y que una de sus principales características sea la apertura y la comunicación¹.

Cuando se gestó la idea de hacer un Museo dedicado a la educación, surgieron varios interrogantes, entre ellos definir cuál iba a ser su nombre, porque marcaría la línea de estudio e investigación a seguir. En segundo lugar, pensamos en darle un matiz diferenciador con respecto al conjunto de museos de esta naturaleza que estaban surgiendo en España. Habían nacido centros dedicados exclusivamente a los manuales escolares; otros marcaban su intención de centrarse en la legislación escolar; así pues dirigimos la mirada a los cuadernos escolares, máxime cuando habíamos recibido un magnífico cuaderno de rotación en los primeros momentos del Museo. A partir de entonces el reto estaba en conseguir cuadernos escolares que nos permitieran su estudio, y el transmitir a la ciudadanía el valor pedagógico de este recurso que evitara su pérdida o destrucción y nos permitiera la conservación y colección de los mismos.

Los cuadernos forman parte integrante de la cultura material escolar y desde hace poco tiempo resulta llamativo observar la valoración que la nueva historiografía educativa otorga a nuevas fuentes y recursos para conocer el pasado de la escuela, esto es, la Historia de la Educación. Nos estamos refiriendo, concretamente y para este análisis, a los componentes de la cultura material. Los objetos y útiles, – los registros objetivos como los denomina el profesor Escolano – que forman la cultura material de la escuela, son reflejo de la cultura empírica transmitida de manera corporativa entre los docentes, y en parte también de las

¹ O. Fontal, R.E. Valle, *Del museo al aula. Apreciat la cultura a través de la diversidad*, en R. Calaf, O. Fontal, R.E. Valle (Dirs.), *Museos de arte y educación: la construcción del patrimonio de la diversidad*, Gijón, Trea, 2007, pp. 361-385.

culturas teóricas y legislativas que se han proyectado en la escuela a lo largo de su existencia. Todos estos objetos, que en nada se parecen a los tradicionales recursos de investigación de los que los historiadores se han servido, textos y documentos archivísticos, nos proporcionan información, poseen significado propio cuya interpretación corresponde a los historiadores de la educación. Son fragmentos de la microhistoria escolar, producidos en el interior del aula por los alumnos y profesores en el ejercicio diario de las actividades académicas. La clave de estos objetos es atribuirles credibilidad ante los ojos del historiador, es decir, otorgarles la capacidad de ser representaciones significativas de una cultura que nos habla de nuestras tradiciones, de la memoria colectiva, del pensar y sentir la escuela, y una vez dado este paso, ir más allá, para reconstruir el pasado de la escuela desde una perspectiva narrativa más flexible. Este artículo se dedica, por tanto, al estudio de los cuadernos escolares desde una nueva óptica, la que aporta su interpretación como una huella plasmada en el pasado de escrituras personales que está ahí, dispuesta y esperando para ser reinterpretada en clave narrativa con criterios históricos y educativos.

1. *Nuevas líneas de acceso e investigación del Patrimonio Histórico Educativo*

En los últimos tiempos el valor patrimonial de la cultura material de la educación se está realizando como consecuencia de una mayor conciencia ciudadana del legado histórico-educativo y también a una ampliación del concepto de patrimonio cultural, que se acerca hacia campos como la etnografía y la escuela. La constitución de este patrimonio como objeto historiográfico abre nuevas vías para la investigación del mismo que no pueden circunscribirse a las tradicionales y descriptivas, sino que, antes bien, supone un salto cualitativo para estudiarlo de una manera más flexible y abierta. La cultura escolar es un registro de la vida diaria de las aulas en épocas pasadas, nos muestra el grado de incidencia de las teorías científicas y pedagógicas en la misma y la aplicación de la normativa política coincidente con la ideología de los diferentes gobiernos. Permite, por tanto, adentrarse en un viaje hacia el pasado para recoger los vestigios visibles, y volver hacia el presente para realizar un ejercicio de reflexión atribuyendo significado a las representaciones de este legado. Coincidimos con el profesor Escolano Benito² en primer lugar en que el uso de las fuentes materiales de la historia de la escuela supone un giro epistémico y social importante porque vuelve la mirada hacia la cultura empírica, es decir, hacia la cotidianidad del aula, al currículo que se desarrollaba realmente y a

² A. Escolano Benito, *La cultura material de la escuela*, en A. Escolano Benito (ed.), *La cultura material de la escuela. En el centenario de la JAE (1907-2007)*, Berlanga de Duero, CEINCE, 2007, pp. 15-27, en partic. p. 15.

los protagonistas del proceso formativo: los maestros y los alumnos. Vuelve también la mirada hacia los materiales menores, hacia los objetos y mobiliario de las aulas, hacia el utillaje escolar (los cabases, las pizarras, los calentadores, los babis), hacia los elementos de cultura escrita como los manuales y cuadernos, y hacia el patrimonio intangible que está constituido por los testimonios orales de los profesores y alumnos, una herencia frágil y con un alto riesgo a desaparecer.

Durante las últimas décadas el estudio de la cultura material, escrita y oral de la escuela ha sido una realidad con resultados desiguales. El avance ha sido manifiesto en el campo de la manualística escolar con proyectos como el *Emmanuelle* de Alain Choppin en Francia, el CEINCE en Berlanga de Duero (España) o MANES dirigido por la UNED. Asimismo se ha ido completando el mapa de la escuela, cómo fue y cómo evolucionó al compás de los años con estudios parciales principalmente descriptivos, de los que pueden ser ejemplos monografías sobre la evolución del banco escolar, las láminas de Ciencias Naturales o los instrumentos físico-químicos en la escuela. Sin embargo, otros objetos de la escuela que reflejan asimismo la cultura empírica y las relaciones con la cultura normativa y la teórica no han tenido el mismo desarrollo, quizá porque el procedimiento de estudio se hacía más difícil con los procedimientos tradicionales. De nuevo el profesor Escolano indica que habría que realizar un nuevo salto también a la hora de tratar el legado histórico-educativo³.

El método de investigación utilizado siempre debe encontrarse dentro de los cauces establecidos por la ciencia, en nuestro caso el histórico-pedagógico, enfocado desde perspectivas complementarias como la social. El método es histórico, ya que la historia de la educación escolar se engloba dentro de una historia general político-social. La educación no se puede desligar de la historia general, de tal forma que el hombre, su vida y su cultura son también un hecho histórico. La escuela se constituye en uno de los espacios de intervención fundamentales del hombre, por lo cual la interpretación histórica es esencial. Y el método es pedagógico al tratar sobre una realidad e institución educativa como es la escuela. Cuando nos referimos a la escuela hay que tener en cuenta sus diversos apartados, esenciales en el análisis histórico. Existe una estructura material que da cobijo a la enseñanza: espacios, mobiliario, utillaje, medios didácticos; unos contenidos, disciplinas o currículo que nos remiten a lo que se enseña y cómo debe hacerse; y nos encontramos de igual forma con los actores de la misma: alumnos y maestros, que, en definitiva, son los auténticos protagonistas de aquello que tiene lugar en los espacios de las aulas⁴.

Junto a esto, y a su vez, es preciso dejar paso a nuevas propuestas, situando los materiales en los escenarios de los distintos lugares y tiempos en que se

³ *Ibid.*

⁴ B. Martín Fraile, I. Ramos Ruiz, *The testimonies of the teachers. A new investigation line for the study of the educative heritage*, informe presentado al XIV International Symposium for School Life and School History Collections, Brixen, Freue Universität Bozen, 2011.

crearon y en cómo se utilizaron. Hay que apostar por el poder narrativo del legado escolar, después de dotarle de un significado extraído de las señales, las asociaciones y relaciones que dejaron los objetos. En nuestro caso se trata de las escrituras personales que los protagonistas de la escuela transmitieron en los cuadernos de aquellos hechos, vivencias y situaciones cotidianas que reclamaron su atención, su interés o sus emociones. Buscamos la relación de los objetos con sus contextos de creación y uso, intentando construir una especie de «arqueología de las cosas ajustada a su genealogía»⁵, para, a partir de esto realizar una interpretación o una recreación de la historia de la escuela y de la infancia de épocas pasadas. Siempre, claro está, con la prudencia necesaria basada en el conocimiento histórico de la realidad social y político de cada etapa, y en el contraste de la información alcanzada con otras fuentes como la manualística, la archivística o la legislativa.

De esta forma, se inicia una reinterpretación de la escuela más compleja y rica, en la que se entremezclan memoria (la huella, el objeto, el testimonio, el recuerdo) y la historia (la interpretación científica de la memoria), y en la que «cada generación intervendrá para construir nuevas lecturas del patrimonio recibido y nuevas sendas de sentido»⁶.

Estaremos así en situación de poder seguir avanzando en el estudio de la historia de la escuela, de la infancia y de la educación, al contemplar el patrimonio histórico educativo como «registro empírico y efectual de las prácticas culturales de una época, de cada época, de todas las épocas»⁷ y su relación con la influencia que la cultura normativa y la teórica ejercieron en dichas prácticas culturales.

Junto a las investigaciones sobre el patrimonio histórico educativo se encuentran las nuevas finalidades que surgen de su conocimiento: concienciar y hacer responsable a la ciudadanía de este legado. Por eso uno de los retos que se nos plantean a las sociedades de patrimonio histórico-educativo y a los museos educativos es generar entre la ciudadanía una conciencia del valor del patrimonio histórico educativo, fortaleciendo un compromiso con su pasado para asegurar la transmisión cultural del mismo en el futuro. Esto sólo se va a conseguir cuando la sociedad conozca, sepa, y sienta como suyo el patrimonio, puesto que sólo así aprenderá a valorarlo y a apreciarlo. La transferencia de este conocimiento a la sociedad nos permitiría abrir posibilidades en la transformación del entorno, una labor fundamental para que el patrimonio sea salvaguardado. En los últimos años se han abierto nuevos canales de comunicación, se han generado nuevos espacios de colaboración, diseñado materiales didácticos aprovechando

⁵ Escolano Benito, *La cultura material de la escuela*, cit., p. 20.

⁶ A. Escolano Benito, *La cultura material de la escuela y la educación patrimonial*, «Educatio Siglo XXI», vol. 28, n. 2, 2010, pp. 43-64, en partic. p. 47.

⁷ *Ibid.*, p. 20.

las Nuevas Tecnologías que han conseguido un mejor y más atractivo acceso al patrimonio.

El estudio de los cuadernos escolares, a través de las «escrituras al margen», potencian la dimensión educativa del patrimonio histórico-educativo con una óptica distinta, que da como resultado el interés y la conciencia ciudadana, cumpliéndose así el consejo de la UNESCO de desarrollar «enfoques interdisciplinarios destinados a revitalizar de manera coordinada el patrimonio cultural y natural, material e inmaterial». El estudio nos ha permitido jugar con lenguajes de pedagogías modernas, con estrategias comunicativas más atractivas y emotivas para lograr un acercamiento y comprensión hacia la sociedad superando el horizonte del reducido círculo de expertos. Como observa el profesor Viñao «los objetos de memoria hablan a quien sabe preguntarles»⁸. Las «escrituras al margen» son narrativas dinámicas, unidades intermediarias que permiten la transferencia de la cultura patrimonial a la sociedad. Propician que la sociedad se interese por el conocimiento y que los historiadores de la educación y del patrimonio histórico-educativo se sientan más cercanos a la sociedad.

2. Cuadernos escolares: «pensar y sentir, las escrituras personales»

Convenidos en la idea de que los cuadernos son registros de la cultura material que nos proporcionan la información necesaria para conocer e interpretar la historia de la educación, estamos entonces en condiciones de poder realizar este estudio. ¿Qué son en realidad los cuadernos escolares? Son hojas de papel unidas, que forman un conjunto que alguien escribe, que nos brindan una referencia válida para el estudio de la historia de la escuela.

Una interpretación muy atractiva nos la proporciona Branko Šuštar al decir que el cuaderno guarda un lugar muy especial entre los utensilios escolares:

es el resultado escrito del esfuerzo propio del alumno en su camino hacia el saber y une al alumno con el maestro y al saber, representando un lazo entre la escuela y la casa. [...] no por algo deja de ser que la palabra eslovena que designa al cuaderno escolar (*zvezek*) proviene de «unir», «atar» hojas de papel lo cual imbrica también esta triada de maestro, alumno y saber⁹.

⁸ A. Viñao, *La memoria escolar: restos y huellas, recuerdos y olvidos*, en *Homenaje al profesor Alfonso Capitán*, Murcia, Universidad de Murcia-Servicio de Publicaciones, 2005, pp. 739-758, en partic. p. 754.

⁹ B. Šuštar, *Presentación de la Exposición de Cuadernos de la escuela*, Museo de Lubliana, Eslovenia, 2012.

Los cuadernos establecen puentes entre la escuela de antes y la de ahora, para conocer dónde y cómo se educaron generaciones anteriores a las nuestras. En este sentido se propicia una escucha activa de lo que nos cuentan. Es una nueva perspectiva la que se escenifica ante los ojos de quien quiera acercarse y mirar, un enfoque para recuperar, interpretar y valorar la intrahistoria de la escuela, desde lo personal, desde la mirada del alumno, desde la guía o adoctrinamiento por parte del maestro, otras desde la recepción efectuada por el protagonista del dato oficial y aquellas que proceden de la pura percepción individual o colectiva del hecho real. Cuadernos que hoy por hoy son una fuente histórica documental, aunque en el momento de ser escrito su mérito fue el ser instrumento didáctico de primer orden. De alguna manera, su estudio nos permite también comparar el uso que se hacía de los mismos con el que actualmente hacen los alumnos del siglo XXI. Pero sobre todo, es un material escrito que muestra eficazmente lo que la escuela fue y cómo evolucionó al compás de los años, también reflejado por los estudios de Dominique Juliá¹⁰.

La escritura de los niños en la escuela, la del maestro al preparar sus lecciones, la del inspector al visitar las aulas adquieren ahora una proyección pública de lo que en su momento no trascendía del aula, lo que denominamos escrituras del yo, escritas en primera persona. Prácticas habituales de escritura en la escuela, de conducta diaria, de rutina que se repite una y otra vez, que nos acercan a fragmentos de la realidad que, a su vez, nos irán desvelando el significado de otros aspectos curriculares, sociales, políticos, o expectativas de futuro al salir del espacio protegido de la escuela. Aspectos en los que coincidimos con Silvina Gvirtz¹¹ cuando nos habla de reconstruir las prácticas cotidianas a partir del análisis de los cuadernos.

A diferencia de los manuales, que responden a criterios oficiales y de los cuales encontramos ediciones múltiples, los cuadernos son únicos. Lo son porque los escriben personas diferentes en un tiempo determinado, porque el espacio es también irrepetible tanto en su localización como en el aula donde se escribe, y de la misma manera y consecuentemente es diferente su contenido. Sus páginas proporcionan una información directamente relacionada con dos vertientes, una objetiva y formal, el currículum explícito trabajado en el aula, y otra denominada subjetiva y sentimental, que responden a un abordaje metodológico distinto. No todos presentan la doble faceta de recoger la razón y el sentimiento, la enseñanza del currículo y el corazón, vivencias. En aquellos donde están presentes ambos elementos de manera conjunta se revive la escuela de la infancia, cargada de programa académico y de sentimiento, y también, la posibilidad de asomar a la realidad que transcurría fuera de los espacios

¹⁰ D. Juliá, *Documentos de la escritura infantil en Francia*, en Q. Antonelli, E. Becchi (edd.), *Scritture bambine. Testi infantili tra pasato e presente*, Roma-Bari, Laterza, 1995, pp. 5-24.

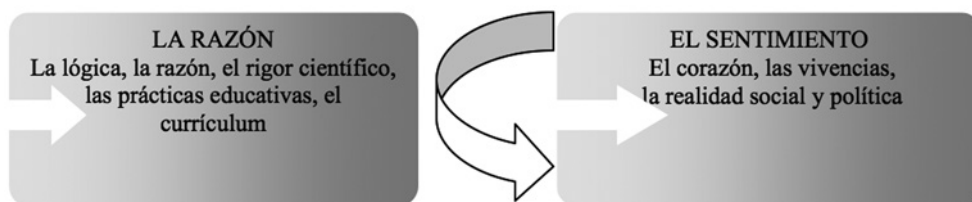
¹¹ S. Gvirtz, *Del currículum prescrito al currículum enseñado: una mirada a los cuadernos de clase*, Buenos Aires, Aique, 1997.

escolares y que afectaba con tal intensidad en el espíritu del autor que se dejó constancia del hecho, de la realidad que sucedía fuera de la escuela. La primera vertiente, el pensar, la huella del currículo, lo estudiamos en el CEMUPE mediante cuatro grandes apartados con subdivisiones sucesivas: el formato, la autoría, el contenido y las clases de cuadernos¹².

La segunda vertiente configura la base central del estudio *Escrituras al margen*, rastreando vida y sentimientos en los renglones escritos por manos infantiles, de docentes o de inspectores, unas veces recogidos en enunciados, otras en el contenido del asunto y otras en las márgenes; esto es, la escritura alternativa, la que no se ajusta al currículum totalmente, sino que se escapa de la red que teje la legislación y el *habitus* del maestro. Constituyen una radiografía de la época, lo que acontece en el entorno y en la vida misma. A esto lo hemos denominado «escrituras al margen», es decir, marcas de escrituras que no se refieren directamente a aspectos del currículum formal, pero que son huellas y vestigios de la cultura, de la vida y de la sociedad pasada.

Pensar y sentir, estas son las claves. Los cuadernos son una fuente primaria de matices muy diversos, con múltiples variables que hay que considerar, sujeta a un grado de subjetividad por lo que debe contrastarse evidentemente con el análisis de documentos archivísticos de enseñanza primaria, con el estudio de la legislación escolar de esas etapas y con los manuales escolares que se utilizaban. Pero no nos cabe duda de que las aportaciones de la escritura de los cuadernos son muy valiosas para descifrar e interpretar las formas y modelos de escuela que vivieron generaciones ininterrumpidas de niños hasta hace muy pocas décadas.

Ambos aspectos, pensar y sentir, razón y sentimiento, lógica y vivencias, se entrelazan en un continuo, en una cadena que dan como resultado el cuaderno en sí mismo, como producto y ejercicio de una persona o de un colectivo de alumnos, y como proceso a lo largo de unos días, de unos meses, de unos años en que se va escribiendo y cuyo estudio nos permite analizar el rastro dejado de estos elementos en su doble vertiente de objetiva y subjetiva.



¹² B. Martín Fraile, I. Ramos Ruiz, *Estudio y catálogo de cuadernos escolares. Los cuadernos del CEMUPE*, Salamanca, Centro Mueso Pedagógico de la Universidad de Salamanca, 2013.

3. *Escrituras al margen: relación de temas*

El procedimiento seguido consiste en revisar uno a uno y hoja a hoja todos los cuadernos. De esta primera lectura se seleccionan aquellos temas relacionados con las ideas a analizar que previamente hemos apuntado como ejes vertebradores del estudio de investigación. En el caso que nos ocupa son tres los índices temáticos apuntados: costumbrismo, histórico-educativo y emociones. Una vez escogidos se realiza un escaneado del documento y se transcribe el texto. A partir de aquí se sigue una selección de cuestiones y variables de análisis, que permiten un análisis descriptivo mediante categorías de respuestas para realizar una interpretación de las mismas. Por último se realiza la fase de comentario y reflexión. El comentario está marcado siguiendo las pautas de un ensayo académico resaltando la estructura que le confiere personalidad y entidad propia.

El conjunto está dividido en tres grandes apartados: costumbrismo, histórico-educativo y sentimental-emotivo. En los cuadernos se encuentran recogidos pasajes que nos hablan de costumbres, oficios y trabajos desaparecidos, formas de vida, vivencias, que ofrecen un gran valor histórico, costumbrista y expositivo: imagen de la escuela, del niño y del oficio y significado del maestro, pueblos sin escuela o con escuelas en pésimas condiciones materiales e higiénicas, el trato al señor maestro, la conmemoración de una fecha significativa, etc.; también aparece el reflejo de la sociedad de cada época, representado en la enseñanza de valores individuales y sociales transmitidos desde la escuela. Se trata de recoger todo aquello que aporta un enfoque novedoso a los ojos del espectador y/o lector del siglo XXI al que se le presenta una época y un ambiente que ya no existen. Tanto de los cuadernos de los niños, de los maestros, como de los oficiales se extrae esta información vivencial que nos atrapa con una mirada diferente y resaltando lo que hace palpitar al corazón. Al margen del informe puramente oficial la mirada se dirige hacia cuanto hace vibrar los sentimientos personales del niño o del maestro. Se busca en las páginas redactadas de manera pulcra y formal las rendijas por donde aparece la vida, pero la vida social y escolar expresada por los protagonistas y actores de los modelos escolares analizados: maestros y alumnos.

La dimensión costumbrista nos acerca una realidad alejada de la actual: Costumbres, oficios y preocupaciones sociales de otras épocas que, a buen seguro, respondían a una actividad diaria normalizada. Un recorrido por la vida cotidiana que forma parte del acervo cultural de generaciones de niños conocedores del estilo de vida reinante en su infancia que ya ha desaparecido o está a punto de desaparecer.

El segundo aspecto, el dedicado a la temática histórica y educativa, se encuentra ampliamente reflejado en los cuadernos, lo que lleva a dividirlo en capítulos – la imagen de la escuela, el reflejo de la historia en las aulas y el currículo establecido – que nos muestran un retrato de la ideología y valores

transmitidos en la escuela, la importancia de los contenidos enseñados y el significado del concepto de la escuela en otras épocas.

El sentimiento y la emoción se recoge en tercer lugar. A diferencia de lo que sucede en los anteriores, el lector es conducido de la mano del niño/a que mostró sus emociones, bien de manera escrita bien por medio de dibujos. El ejercicio escolar cobra menor importancia, sirve únicamente como soporte, para expresar la preocupación, el interés, la ilusión o la dificultad que asoma en la escritura del niño.

Las páginas siguientes nos muestran tres ejemplos del abanico temático que han realizado desde su posición actual de profesores de historia de la educación, después de leer las páginas de estos cuadernos y reinterpretar a la luz de las coordenadas históricas y educativas el pensar y el sentir que ofrece su contenido.



Fot. 1. Tarjeta de presentación de la exposición itinerante «Cuadernos escolares» (Fotografía de los autores. Fondos del CEMUPE).

Tema costumbrista

- Noviembre y la matanza del cerdo. 1934;
- Costumbres del pasado, oficios antiguos. 1959;
- El trabajo: soldados sin fusiles y sin metralla;
- Un ejemplo de economía. Los aguadores en 1912;
- Redimido de la guerra;
- La lotería nacional;
- La llegada del hombre a la Luna.

Tema histórico-educativo

a. La imagen de la escuela:

- Sustitución del maestro. Obligación o contrato de enseñanza en 1921;
- La escuela es la casa de todas las niñas;
- Condiciones materiales de una escuela rural en 1932;
- Portada de un cuaderno de zona rural en 1957: mi pueblo, mi escuela;
- Comportamiento en la escuela;
- El primer día de clase. Mis estudios a María;
- Regreso a las aulas en 1940;
- El internado escolar. Vacaciones de Navidad en 1965;
- Redacción: un viaje a la capital.

b. El reflejo de la historia en las aulas:

- Azaña. Presidente de la República;
- Cuaderno de correspondencia. La llegada de la II República a la escuela;
- Derechos del hombre;
- La higiene escolar;
- Contenidos en la escuela primaria: Redacción de cartas;
- La tolerancia;
- La rosa o la belleza efímera de la II República;
- Reflejo del levantamiento de 1936 en la escuela;
- Pequeña descripción de su escuela en 1939;
- Tercer año triunfal de la era azul. 1939;
- Sesión de la mañana: Nacional Sindicalismo;
- Visita de inspección I. Escuela del nacionalcatolicismo;
- Visita de inspección II. La Ley General de Educación de 1970.

c. El currículo establecido:

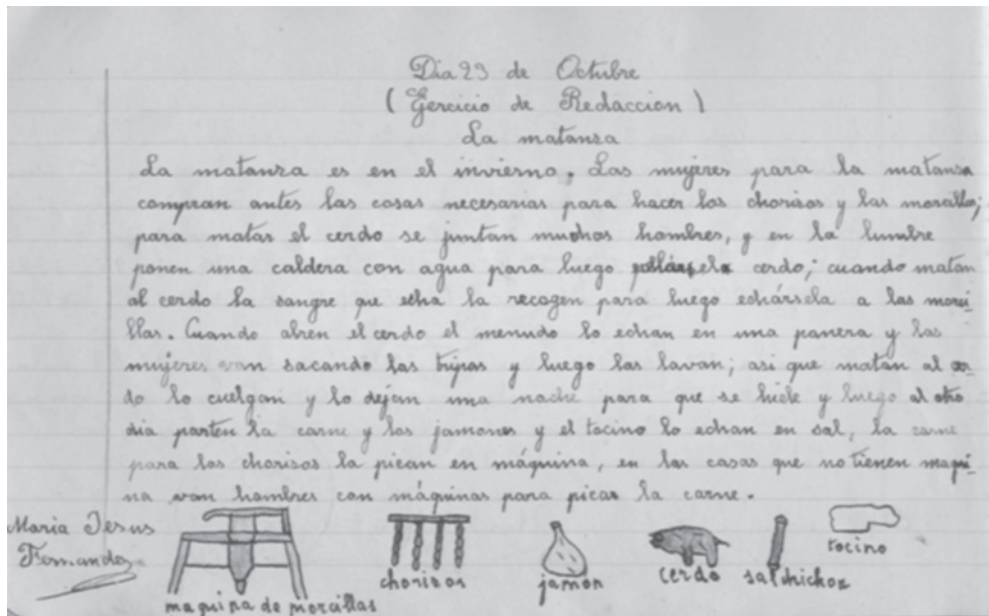
- La enseñanza de las matemáticas en 1898;
- Fisiología y horticultura en la escuela primaria a comienzos del siglo XX;
- Un ejercicio de planas firmado y rubricado. 1913;
- En clase de labores;
- La corrección de la maestra;
- Asignatura para las niñas: economía doméstica;
- Alfabetización infantil: Dos burros;
- Un paseo por el camino de las arenas;
- Collage infantil de materias escolares;
- Copia cien veces: No volveré a...

Tema sentimental emotivo

- Carta de amor. Con la mente en otros escenarios;
- El general Queipo de Llano. Mayo de 1939;
- La educación ambiental como preocupación y sentimiento infantil;
- Mis estudios a María;
- Pinceladas de espontaneidad en el aula;
- El cuaderno decorado;
- «Me fui sin que mis amiguitas lo supieran». La muerte del padre en 1940.

4. Ejemplos de textos de escrituras al margen

4a. Tema costumbrista: «la matanza del cerdo»



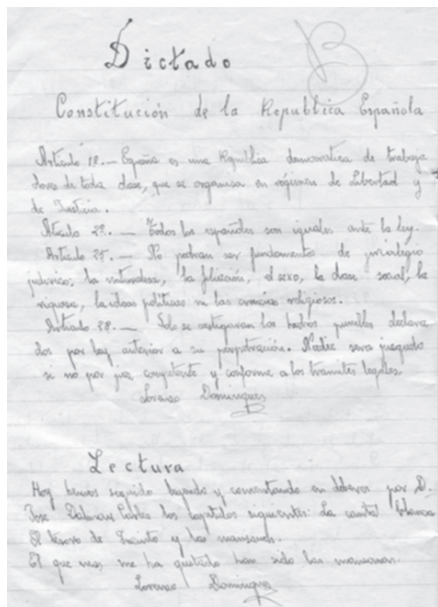
Día 23 de Octubre de 1935 (Ejercicio de redacción).

La matanza es en el invierno. Las mujeres para la matanza compran antes las cosas necesarias para hacer los chorizos y las morcillas; para matar el cerdo se juntan muchos hombres, y en la lumbre ponen una caldera con agua para luego pelar el cerdo; cuando matan al cerdo la sangre que echa la recogen para luego echársela a las morcillas. Cuando abren el cerdo el menudo lo echan en una panera y las mujeres van sacando las tripas y luego las lavan; así que matan al cerdo lo cuelgan y lo dejan una noche para que se hiele y luego al otro día parten la carne y los jamones y el tocino lo echan en sal, la carne para los chorizos la pican en máquina, en las casas que no tienen máquina van hombres con máquinas para picar la carne.

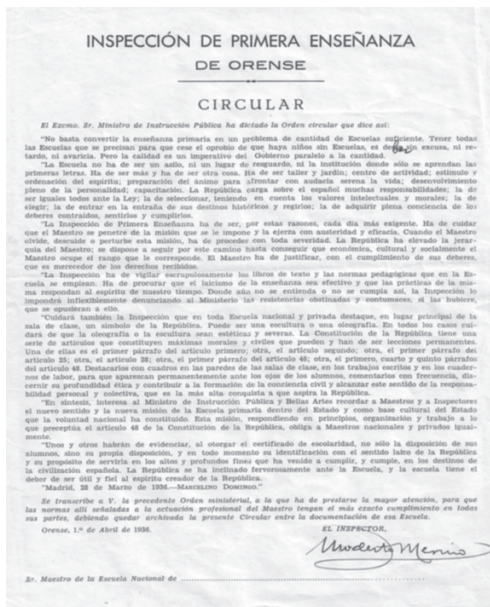
Fot. 2. Cuaderno de rotación de Argamasilla de Calatrava (Ciudad Real) 1935. Fotografía de los autores. Fondos del CEMUPE.

Este ejercicio de redacción es hoy en día una muestra de las costumbres y modos de vida en España que casi han desaparecido. La matanza del cerdo, que era una práctica frecuente hace tiempo, se ve cada vez más reducida. El relato minucioso y detallado expresa la ocasión que supone la matanza del cerdo para reunirse hombres y mujeres del pueblo en una tarea común, aunque con trabajos bien diferenciados. Es algo que se sale de la rutina diaria y marca jornadas señaladas que se repiten cada año. La niña sabe muy bien lo que está escribiendo, va dejando constancia paso a paso de lo que se hace y los productos que se van obteniendo. Le gusta el ejercicio y lo completa con dibujos, entre los que se destaca la máquina de morcillas, que actualmente sería un instrumento de colección para la etnografía. Una de las razones por las que los cuadernos son interesantes es porque nos permiten adentrarnos en aspectos etnográficos y de economía doméstica de épocas pasadas. Los días de matanza los niños no acudían a la escuela porque todas las manos eran necesarias. La escuela rural consentía esta ausencia infantil, que se traducían en un refrán o dicho popular en el que se decía que a la escuela se podía faltar dos días «el de la matanza del cerdo y el de la muerte de la abuela». La escritura infantil deja impreso en el papel cómo se llevaba a cabo esta labor que les permitiría tener abastecida la despensa durante una buena parte del año. Es un testimonio real de la vida cotidiana que ha quedado grabado y que ahora leemos casi ochenta años después. La costumbre popular que se mantuvo durante siglos se ha sustituido por procedimientos industriales y, aunque lo que nos cuenta la niña no nos es desconocido, no es menos cierto que es algo que ha desaparecido prácticamente y queda reducido a la memoria colectiva.

4b. Tema histórico- educativo: «la escuela es el reflejo de la sociedad»



Fot. 3. Cuaderno de rotación de San Miguel de la Ribera (Zamora) 1936. (Fotografía de los autores. Fondos del CEMUPE)



Fot. 4. Orden Circular Inspección Educativa de 1936. (Fotografía de los autores. Fondos del CEMUPE)

La escuela reflejo de la sociedad, y el cuaderno que presentamos reflejo de la influencia de la cultura legislativa en la práctica diaria de la escuela. Este cuaderno pertenece a un niño que en mayo de 1936 – Segunda República – estudia en la escuela de su pueblo. Conocemos el nombre del niño porque firma sus trabajos y el del pueblo también, no así el del maestro, pero no es el caso, la situación académica que recoge se debió de producir en muchas escuelas españolas en este momento. Es el mes de mayo de 1936, gobierna el Frente Popular, una alianza de partidos políticos de izquierda que han ganado las últimas elecciones legislativas. En la dirección del Ministerio de Instrucción Pública y Bellas Artes está Marcelino Domingo, quien en 1934, junto con Manuel Azaña había fundado el partido político de Izquierda Republicana. Destacó al frente del Ministerio por impulsar medidas como la coeducación, la escuela activa, el laicismo y la construcción de escuelas.

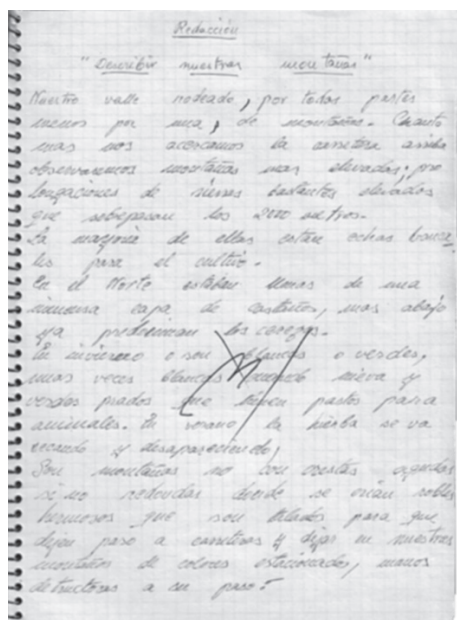
Lo que llama la atención del cuaderno es el dictado que sobre determinados artículos de la Constitución republicana realiza el maestro a los niños. También este dictado hubiera pasado desapercibido a los ojos del historiador si no hubiera tenido en cuenta la Orden ministerial realizada por el Sr. Ministro el 28 de marzo de 1936. Esta Orden va dirigida a la Inspección Primaria de España por medio de una Orden Circular y expresa claramente su objetivo: «para que

las normas allí señaladas a la actuación profesional del Maestro tengan el más exacto cumplimiento en todas sus partes». Si éste era el deseo del Ministro, así ocurrió en la práctica. Pocos días después de la Circular, mayo de 1936, un alumno traslada a su cuaderno una de las normas recogidas en dicha Circular:

La Constitución de la República tiene una serie de artículos que constituyen máximas morales y civiles que pueden y han de ser lecciones permanentes. Una de ellas es el primer párrafo del artículo primero; otra, el artículo segundo; otra, el primer párrafo del artículo 25, otra, el artículo 28; [...] Destacarlos con cuadros en las paredes de las salas de clase, en los trabajos escritos y en los cuadernos de labor, para que aparezcan permanentemente ante los ojos de los alumnos, comentarlos con frecuencia, discernir su profundidad ética y contribuir a la formación de la conciencia civil y alcanzar este sentido de la responsabilidad personal y colectiva, que es la más alta conquista a que aspira la República¹³.

He ahí como en el dictado aparecen estos artículos citados en la Circular. En la mente del Sr. Ministro la escuela debía ser un reflejo de la sociedad deseada y para la República la sociedad estaba basada en conseguir un pueblo culto de ciudadanos que eligiera libremente su destino.

4C. Tema emotivo-personal: «los comienzos de la educación medioambiental en la escuela»



Redacción.

Describir nuestras montañas: Nuestro valle rodeado, por todas partes menos por una, de montañas.

Cuanto más nos acercamos la carretera arriba observamos montañas más elevadas; prolongaciones de sierras bastantes elevadas que sobrepasan los 2000 metros.

La mayoría de ellas están echas [sic] bancales para el cultivo.

En el Norte estaban llenas de una inmensa capa de castaños, más abajo ya predominan los cerezos.

En invierno o son blancas o verdes, unas veces blancas cuando nieva y verdes prados que tienen pastos para animales. En verano la hierba se va secando y desapareciendo.

Son montañas no con crestas agudas si no redondas donde se crían robles hermosos que son talados para que dejen paso a carreteras y dejar en nuestras montañas de colores estacionados, manos destructoras a su paso.

Fot. 5. Cuaderno de rotación de Cabezuela del Valle (Cáceres), 1971. (Fotografía de los autores. Fondos del CEMUPE).

¹³ Orden Circular de la Inspección de Primera Enseñanza de Orense de 1 de abril de 1936, que da curso a la Orden Circular del Ministerio de Instrucción Pública del 28 de marzo de 1936.

Los ejercicios de redacción son una práctica habitual en la escuela primaria de todos los tiempos y un apartado fundamental del área de lenguaje. Es un medio a través del cual los alumnos aprenden a expresarse por escrito, utilizando un vocabulario preciso, cada vez más rico y variado. Aprenden también caligrafía, una presentación limpia y una ortografía correcta. Con las redacciones exponen en el papel su pensamiento, sus opiniones y sus sentimientos, al principio de forma muy rudimentaria, pero poco a poco cada vez con mayor fluidez y facilidad.

Aunque generalmente el alumno escribe bien en lápiz o en color azul, en este caso el color que elige es el rojo, por lo que el maestro la corrige con un bolígrafo azul y firma en medio de la página un bien con mayúscula. Estamos a comienzos de los años setenta, en los inicios de la EGB (Educación General Básica), en un pueblo de Extremadura. El cuaderno es moderno: de espirales, cuadriculado, tamaño cuartilla y pastas duras de color rojo. El ejercicio trata sobre la descripción de las montañas del entorno. Al leer la redacción se observa que no es una más entre todas, sino que las cualidades de este niño la hacen única. Su capacidad de observación de lo que acontece en sus montañas muestra un dominio inusual a esa edad. En una sola página nos arrastra con su mirada a través de un recorrido minucioso por la vegetación del valle en sus diferentes estaciones con un colorido excepcional. No cabe duda de que, junto a la descripción de la naturaleza que le rodea, bancales, pastos, cerezos, castaños, se deja llevar por sus sentimientos hacia su tierra.

Eso es también la escuela. Es el lugar donde se enseña no sólo a leer, a escribir, a contar, sino donde se forman las personas, fomentando sentimientos y actitudes de amor hacia todo aquello que debe ser respetado, el lugar donde se aprende a expresar lo que se siente tanto oral como por escrito. Este ejercicio da un paso más en el objetivo de práctica escolar en la escuela española, y nos da una última sorpresa: la conciencia de medio ambiente que manifiesta el alumno, un entorno querido por él y que empieza a ser arrasado por las carreteras. Es aquí cuando se expresa con toda la pasión que todavía no controla: «se crían robles hermosos que son talados... por manos destructoras a su paso». Intuye el niño el futuro por llegar y no le agrada, alertando con su voz por escrito en el papel del cuaderno. Llega a nuestros días, y a pesar de haber pasado más de treinta años, este tema no ha quedado perdido en el pasado sino que más que nunca está de plena actualidad.

La educación medioambiental constituye hoy un tema transversal en la escuela actual. Los niños aprenden el valor del entorno y la defensa de la naturaleza. Redacciones como la comentada son una práctica habitual en las aulas. Esta redacción de 1970 es quizás de las primeras que encontramos y que luego se van a generalizar en la escuela española.

Conclusiones

A través de este proyecto, hemos aprendido a observar, comparar y reflexionar sobre unos textos escolares escritos en clave personal en los cuadernos, a veces inesperados y otras sorprendentes, pero que siempre llaman la atención y sobresalen por encima de otros ejercicios que esperamos encontrar y que reflejan el currículo oficial. Como decíamos en párrafos anteriores, hemos intentado dotar de coherencia narrativa y dar una estructura histórica-educativa a dichos textos, enmarcados en su contexto y en su tiempo, conjugando el «pensar y el sentir», para que vuelvan a nuestro presente.

Estamos convencidos que la experiencia realizada es un paso hacia adelante en nuevas formas de proceder en la investigación del material de cultura escrita escolar por una parte y por otra en nuevas prácticas de socialización y educación de cara a la ciudadanía que no debemos ignorar, más en consonancia con la sociedad en que vivimos y van a vivir nuestros hijos y también para empezar a valorar la importancia del legado de nuestro patrimonio educativo. Una posibilidad educativa novedosa de cara a la construcción de una futura ciudadanía más solidaria y participativa, curiosa e informada.

En suma, las escrituras al margen suponen una fuente complementaria que completa las tradicionales de carácter documental o las archivísticas. En definitiva, presentamos un proyecto novedoso, al menos diferente a cuanto se publica actualmente en torno a la escuela. La motivación la marca el contenido que se ofrece y la expresividad propia de los cuadernos, que posteriormente es utilizada en la difusión de la información a distintos colectivos que se acercan al estudio de la cultura escolar. Esta cuestión ha sido observada repetidamente en las caras y en los gestos del público que visita el CEMUPE, al cual se le presentan muestras de estos documentos.

En síntesis, el trabajo realizado pretende sembrar semillas de futuro, más que una mera contemplación de los restos del pasado. Analizamos, estudiamos y transmitimos un bagaje cultural válido para la escuela actual y la de un futuro próximo.

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Citizenship model in an informational society

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ABSTRACT: The subject Education for Citizenship presents problems of today's world like: globalisation, crisis of values, marginalisation, digital gap or armed conflicts. This paper analyses the differences and similarities in treating the topic Citizenship in a global world in five textbooks, three in Spanish for the State and two in Basque for the Basque Autonomy. Even though they all follow the curriculum, the State publications place citizenship at a planetary level, with insistence on the economic reading of progress (rich and poor countries); whereas the Autonomic ones place more importance on the political exercise of citizenship at autonomic, national and European level.

EET/TEE KEYWORDS: Citizenship Education; Globalisation; Information Society; Textbook; Basque Country; XX-XXI Centuries.

1. *Legislative and curricular context of education for citizenship*

The Spanish parliament passed a new Education law (LOMCE¹) on 13th December 2013, and eliminated the subject which had specifically dealt with citizenship education since the LOE² was passed 2006 from the official compulsory curriculum. Section IXV of LOMCE Preamble presents the need to tackle civic and constitutional education but always transversally. Below is the text of the law which justifies the need for democratic citizenship and its transversality:

The Recommendation (2002)¹² of the Ministers' Committee of the European Council for Member States on Education for Democratic Citizenship of 16th October 2002, indicates education for democratic citizenship is essential to foster a fair free tolerant society which contributes to: the defence of values, principles of freedom, pluralism, human rights and empire of law which are the essence of democracy. One of the principles inspiring the Spanish Education System is to convey and put into practice those values favouring: personal freedom, responsibility, democratic citizenship, solidarity, tolerance, equality, respect and justice; likewise to assist in overcoming any kind of discrimination. It is also contemplated as a way to prepare students to function as citizens and actively participate in social, cultural and economic life with a responsible critical attitude and capable of adapting to the changing situations of the society of knowledge. This Organic Law considers the preparation for active citizenship essential, together with the acquisition of social and civic skills included the European Parliament and Council Recommendations of 18th December 2006 on critical skills for on-going learning. In the methodological change context which this Organic Law advocates tackling this need transversally by incorporating civic and constitutional education in all subjects during basic education, whereby the acquisition of civic and social skills is included in the daily dynamics of teaching and learning processes fostering their possibility of transfer and orientation via the joint approach.

However, transversality was already in the curriculum, thanks to the LOE, General Law of Education (2006) on introducing the subject-area for the first time in Compulsory Secondary Education (ESO)³ called Education for Citizenship and Human Rights, which the autonomous communities had been teaching in 3rd and 4th year. Furthermore, the new LOE curriculum structure defines eight skills as basic. One called Citizen and social skill taught in both Primary and Secondary Education:

Favours the development of free integral individuals via self-confidence consolidation, personal dignity, freedom, responsibility and education of future citizens capable of judging for themselves, respectful, participative and caring who know their rights, assume their obligations develop civic habits to exercise efficient responsible citizenship. This new subject proposes youngsters learn how to co-exist in a globalised plural society, where citizenship

¹ LOMCE – Spanish Organic Law for the Improvement of Educational Quality.

² LOE – Spanish Organic Law of Education.

³ ESO – Enseñanza Secundaria Obligatoria – Compulsory Secondary Education.

not only includes civil, political and social aspects but also previous historical periods. It includes as a reference the universality of human rights, which while acknowledging differences ensure social cohesion [...] and fostering democratic citizenship as part of educational goals and activities, in the same way different international bodies do⁴.

The subject Education for Citizenship and Human Rights is divided into five blocks ranging from the nearest and most personal to the most general and global, predominating knowledge of reality from social learning to the last block, i.e. Citizenship in a global world. This latter tackles some characteristics of today's society: inequality in its different manifestations, the globalisation and interdependence process, major armed conflicts in the world today likewise the role of international bodies in their prevention and resolution. Block 5 is specified in the Decree itself as follows:

- An unequal world: wealth and poverty. The 'feminisation of poverty'. No access to education as a source of poverty. The struggle against poverty and aid to development.
- Armed conflicts in today's world: the role of international bodies and Spanish armed forces on international peace missions.
- Globalisation and interdependence: new forms of communication, information and mobility. Relationships between citizens, the economic and political powers.

Taking the LOE as a reference and applying the transferred attributes in educational material, Decree 175/2007, of 16th October establishes the Basic Education curriculum implementing it in the Basque Autonomy⁵. In the Supplement⁶ to the same Education for Citizenship and Human Rights is established for ESO. We have verified Basque legislation makes references in similar terms to citizens in a global world, although the curriculum reference horizon is the basis for education on Human Rights fostered by the UN with their Revised project action plan for stage one (2005-2007) of the World Programme for education on human Rights. In this area, Education for citizenship aims to:

Develop the practice of a citizenship which stands up to the demands of complex social development, such as: cultural and economic globalisation, knowledge management, constant technological advances (and its negative side, i.e. environment degradation, violation of Human Rights, violent conflicts, cultural, economic and sexual exploitation, etc.), which make up the new state in the evolution of the historically unrivalled capitalist social system called «reflexive modernisation» [...]. The need to introduce un a space for reflection in education and practice centred on such outstanding aspects as global citizenship, own identity and its respectful relationship with other identities, cultural diversity, gender relationships or individual rights and obligations seems unquestionable. It certainly deals

⁴ R.D. 1631/2006, p. 715.

⁵ Official Basque Gazette n. 218, 13th November 2007, p. 26035.

⁶ Official Basque Gazette, Supplement to n. 218, 13th November 2007.

with sensitive matters on entering the world of values and personal choices, yet by no means inaccessible via dialogue and what that implies, i.e. communicative equality and rationality. [...] Exercising citizenship requires feeling the implication in collective matters and comprehending the social problems affecting us from local to global⁷.

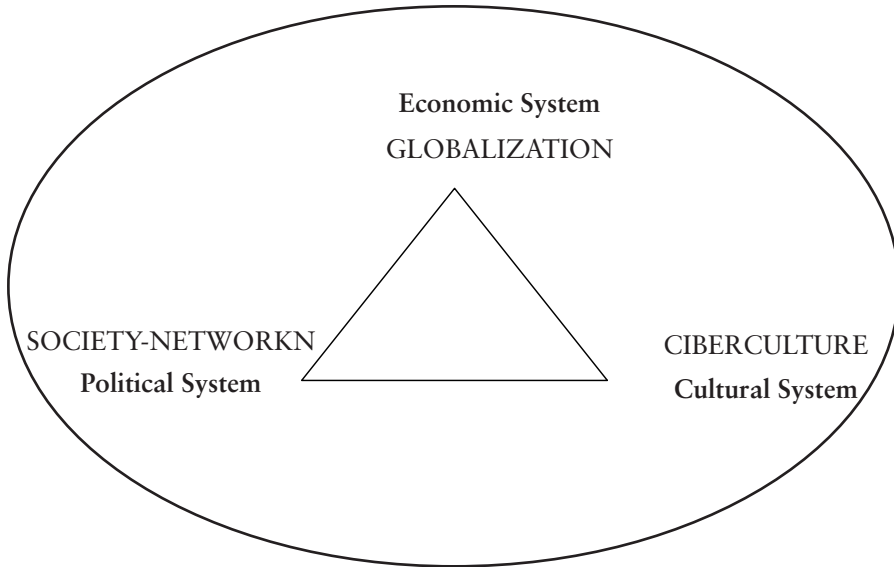
The difference between state and autonomic legislation resides that in the latter, the reference to contents includes movements, strategies and organisation involved at global level in the advance of democracy and sustainable development. Furthermore, they propose as a topic⁸ elemental aspects of democracy with globalisation and negative consequences implied. Likewise, democracy and human rights are directly related in a world where violation of these rights is commonplace.

2. Information society flows and exchanges

In the west, concern about the future is associated with capitalism, the concept of eternal progress (theoretical debate), defined as sustainable progress in today's speeches. Capitalism changes cyclically, for example, the industrial revolution changed the production system from artisanal and agricultural to industrial, bringing with it socio-political changes. The revolution of the bourgeoisie launched the society of classes, and the industrial revolution proletariat technification and awareness; likewise new values and legitimisation attitudes such as individualisation, i.e. the new citizenship associated with the nation-State, positive assessment of economic benefit, consumption, etc. Industrial society is currently changing to that of information, to the extent industrial development is giving way to informational. One can affirm the new emerging social system seeks access to information and subsequent processing as a priority activity as opposed to fostering industrial development, since this is the activity producing the most economic benefits. Information generation, processing and transmission are becoming essential productivity and power source. Although this movement arises from the economic sphere it manages to reach other spheres of social life, particularly politics and culture. In Fig. 1, Marí Saez shows the three systems which inter-related in the current informational paradigm. The three systems are systematically inter-related and explain the formal changes occurring the economic space or mass media reaching the ways of knowing, learning, socially organising ourselves, relating to one another in such a way, that three new structures have appeared, i.e. globalisation, society-network and cyberculture:

⁷ Official Basque Gazette, Supplement to n. 218, 13th November 2007, pp. 522-526.

⁸ *Ibid.*, p. 537.



Pic. 1. *Information paradigm*⁹.

We talk about globalisation because economic and informative exchanges occur at world level in real time, thereby: configuring world-sized markets characterised by productivity increase, production decentralisation, less need for labour, rupture of economic frontiers, no nation-State policies, common infrastructure material and communication; likewise media cultural messages and products as the main social legitimisation mechanism.

We also talk about society-network, characterised by the constitution of social organisation and social interaction based on interactive information networks using information technologies particularly Internet. The society network tends to be constituted around individual projects autonomously constituted in relation to vertical organisations and State institutions. Such processes are a source of growing autonomy and freedom¹⁰.

Lastly, cyberculture characterised by a change in space-time references (change of space, from places to flows and from chronological to timeless time), a communication model with network logic (role change emitter-receiver, non-hierarchical); and different relation guidelines with new or hypertext (non-linear information access like textural, sonorous or iconic integration).

⁹ M. Marí Saez, *Globalización, nuevas tecnologías y comunicación*, Madrid, Ediciones de la Torre, 1999, p. 39.

¹⁰ M. Castells, *La era de la información. Economía, sociedad y cultura*, Madrid, Alianza, 1997, p. 28.

We embrace the idea sustained by Castells¹¹, on indicating the informational paradigm is hegemonic or predominant today, since it organises society likewise all its relations giving it a ‘sense of being’. Furthermore, this is done in a complete fashion since it is the transversal axis running through all the activities carried out in it. This exclusive character impregnates all spheres where a person functions as an individual or group. Castells shows the relations established between economic, cultural and political systems; i.e. the changes in production (economy) relations cause transformations at the same time in power (politics) relations and experience (culture). This is why the informational paradigm emerges through global economy, which also conditions the development of certain social and cultural structures.

3. Two dichotomies marking identity construction, i.e. local/global subject and economic/political subject

Following the thesis upheld by Bourdieu¹², that we live in a reality organised into dichotomies, we can state the specific/universal dichotomy, like it or not is the philosophical base organising our knowledge of reality, i.e. we specifically know universal knowledge. We should like to highlight that the main basis of the specific is intimately related to the communication system established by the specific human group using it, i.e. language, where a specific sociocultural context is created. The current or most generalised version of the said dichotomy is local versus global, which is established in a conception derived from the economic expansion process from capitalism, and is closely related to the world economic hegemony or power systems. The enlargement of markets and production systems has acquired global characteristics likewise forms of domination. Markets and production needs have expanded thus the education systems of nation-states are more and more homogenised to deal with an ever more technically specialized market and more globalised in production terms.

‘Globalisation’ that magical word on the lips of all today’s thinkers with arguments and different opinions on the topic¹³. Globalisation is perceived in different ways, for some it is somewhat beneficial since it will homogenise the world and human relations based on an unsurpassable economic (capitalism) and political (democracy) system. Whereas for others it is counterproductive for individuals, societies and nations insofar as it is the consequence of

¹¹ *Ibid.*

¹² P. Bourdieu, *La dominación masculina*, Barcelona, Anagrama, 2005, p. 20.

¹³ P. Juaristi, *Euskal Herria globalizazioaren aurrean*, Bilbao, BBK/Euskaltzaindia, 2001 (in basque), pp. 15-39.

technological progress, and may increase the great differences we live today in a world society. In fact the great economic benefits, information access and control are in the hands of a few, while the vast majority survives in a world where the key is to control the communication system and benefits.

However, we find a world society organised into nation-states where the individual is one its fundamental pillars. This individual constitutes different types of subject within the same person; i.e. the political subject who has citizen rights and duties; the economic who has economic rights and duties; and the cultural who has rights and duties as a member of a given sociocultural group¹⁴.

Although regarding politics, nation-states maintain their differences. They continue shaping citizens as a subject of rights and duties for the nation-state. We can be workers or technicians in a world economic system; but not world citizens. World citizenship does not exist yet. In this sense, a revitalisation of local as an identity environment close to the subject is occurring¹⁵. This environment coincides with sociocultural groups co-existing in virtually all nation-states worldwide, the vast majority of which are plurinational¹⁶.

Today's societies consider the educational environment of great importance, more so in developed and industrialised countries. The educational system constitutes a vital instrument in current states for cultural reproduction and state identity, likewise production thereof among future generations. When schooling a minor, it should be born in mind his/her identity (personal and sociocultural) is developed at school and in a school context until ready to take part in the labour market and democratic society. This reproduction labour (including reproduction habits, beliefs, thought, ideology and values), which has so much strength in modern societies is preferably carried out at school, since this is where we learn to be a democratic citizen, worker, or technician. Even so, each nation-state maintains and marks the difference regarding aspects related to education in national identities and organisation of citizen co-existence.

We have stated the socio-political and cultural context should in our opinion illustrate and locate any analysis about globalisation and citizen identity in it. Analysed below is the concept of citizenship in a global world in the contents of the books selected.

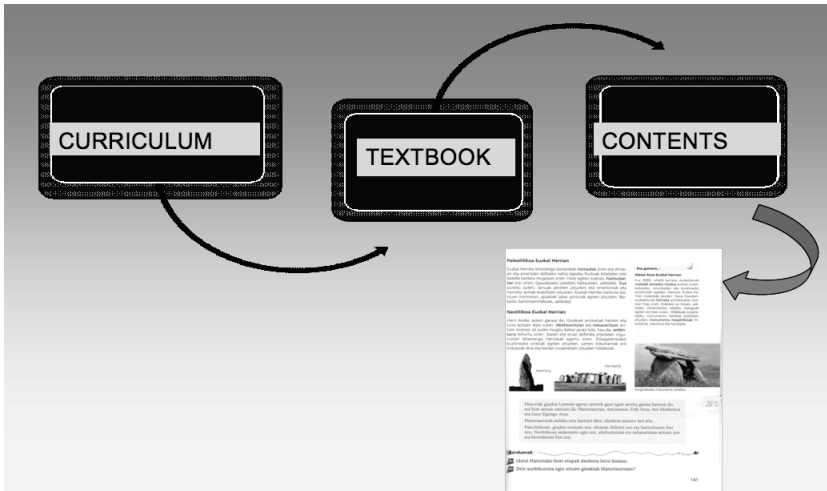
¹⁴ G. Ezkurdia, *Curriculum eta Ingurunea Euskal Herrian*, Donostia, Utriusque Vasconiae, 2004 (in basque), p. 33.

¹⁵ M. Castells, *Los estados ya no pueden gobernar, sólo negociar* [States can no longer govern, only negotiate], «Ajoblanco», n. 122, october 1999, pp. 36-43, p. 37.

¹⁶ P. Iztueta, *Hezkuntza, Hizkuntza eta Boterea Euskal Herrian*, Donostia, Utriusque Vasconiae, 2000 (in basque), p. 114.

4. Textbooks: contents analysis and results

The curriculum selected in the textbook delimits and outlines the contents to be developed in classroom teaching and is the result of an ideological option which has a partial cultural and social meaning and as such excluding. As Bowles and Gintis pointed out they reflect the explicit and hidden curriculum, offering a vision of reality which seems true and singular, by highlighting some aspects of this and overlooking others either by not explaining or simply omitting them in the discourse¹⁷. This planning and consequently its classroom teaching are designed by the publishing groups who adjust the book contents, insofar as they interpret and re-draft the official curriculum. Therefore, we can say the citizen training planned via the school curriculum is presented in the textbook contents.



Pic. 2. Practical exercise of the curriculum.

Authors who researched the role of textbooks in education¹⁸ attribute different functions to this material, two of which we highlight: the first essential, i.e. socially and culturally uniforming or homogenising all citizens. A uniformity expressed mainly in hegemonic cultural and social models of each historic moment. The second function sometimes complementary to the previous is cognitive. The textbook offers one (and no more) image or representation of

¹⁷ J. Torres, *El currículum oculto*, Madrid, Morata, 1992, p. 110.

¹⁸ A. Choppin, *Pasado y presente de los manuales escolares*, in J. Ruiz Berrio, *La cultura escolar de Europa. Tendencias históricas emergentes*, Madrid, Biblioteca Nueva, 2000, pp. 107-166; M. Apple, *El conocimiento oficial*, Barcelona, Paidós, 1996.

the world contributing to the construction of socially hegemonic individual and collective knowledge schemas¹⁹. This use of textbooks, where knowledge and values are presented and taught as if common and universal, has direct consequences for students in terms of knowledge and reality acquired, likewise in the construction of individual and collective identities. The textbook is used to plan and teach²⁰ (often by imposition), affective, cultural, ideological and intellectual training of future generations. In other words it impacts on the student's identity training²¹.

This paper we are presenting is part of the Ministry for Education and Science research project SEJ2007-66097 called Citizenship, complex identities and political culture in Spanish school handbooks (1978-2006). This paper has reduced the sample to the five books published for the subject Education for Citizenship in ESO. Three correspond to the publishers: Anaya, Santillana and SM, i.e. publications with a large circulation for ESO students in any Autonomy (they all translate the same version for publication in the co-official language of each Autonomy). The other two analyzed; however, are published by Erein (solely in Basque) and Ibaizabal (publishes the same version in Basque and Spanish). Table 1 summarises the sample chosen to extract the contents referring to citizenship in a global world:

	Year	Publisher	Title	Author/s
N. 1	2007	Anaya	Educación para la ciudadanía.	Pablo Navarro/ Capitolina Díaz
N. 2	2007	Santillana	Educación para la ciudadanía	Carmen Pellicer/ María Ortega
N. 3	2007	SM	Educación para la ciudadanía	José Antonio Marina
N. 4	2008	Ibaizabal	Educación para la ciudadanía	Juanjo Leanizbeaskoa
N. 5	2008	Erein	Herritartasunerako eta giza eskubideetarako hezkuntza	José Mari Balerdi/ José Ramón Makuso

Table 1. *Sample of books analysed.*

Having analysed the contents regarding citizenship definition in a globalised world, we find different approaches to the topic depending on the Publisher, as shown in Table 2. The publishers SM and Erein deal with it in

¹⁹ Apple, *El conocimiento oficial*, cit., p. 66.

²⁰ F. Richadeau, *Concepción y Producción de Manuales Escolares. Guía Práctica*, Paris, Serbal/Cerlac/UNESCO, 1981, p. 66.

²¹ G. Ezkurdia, B. Bilbao, K. Perez, *Creation of identities at school: The local, state and global identity*, in J. Rodríguez Rodríguez, M. Horsley, S.V. Knudsen (editing and design), *Ten International Conference on Research on Textbooks and Educational Media: Local, National and Transnational identities in Textbooks and Educational Media*, IARTEM, 2010, pp. 346-355, p. 347, <http://iartemblog.files.wordpress.com/2012/03/x_conference_textbooks_iartem_155x235_hd.pdf> (lastaccess: February 12, 2014).

several units whereas the other three dedicate a specific unit well-related to a world society, development or as in the case of Ibaizabal with Citizenship in a global world (Globalization and interdependence). Noteworthy terms in the conceptualisation of this citizenship type are on the one hand, citizens of the world, world citizenship and a global world; and on the other hand, equality (non-discrimination) related concepts, human rights and democratic co-existence.

	Publisher	Topic	Citizenship
N. 1	Anaya	Topic 12: Towards a world society	Creation of wealth, advance of freedom and democracy, and establishment of solidarity ties between countries and their people, helping us feel more and more like <i>world citizens</i> .
N. 2	Santillana	Topic 9: Aid development	We found no specific reference to citizenship in a global world.
N. 3	SM	Different units	<i>World citizenship</i> (derived from our condition as human beings, informs us we are protected by human rights)
N. 4	Ibaizabal	Unit 6 Citizenship in a global world (Globalisation and interdependence)	Undefined. <i>Equality concept</i> – total absence of discrimination among human beings regarding their rights. Principle proclaimed in the Universal Declaration of Human Rights.
N. 5	Erein	Different units	<i>Citizenship in a global world</i> , as a <i>democracy experience</i> before current problems.

Table 2. *Units and topics per publisher.*

We shall now see in detail the teaching transposition by each publishers when developing the citizenship concept in a global world.

Book n. 1 by Anaya, deals with globalisation in topic 12, called *Towards a world society*, examining some problems our world faces on an international level, such as progressive interdependence among countries, inequality between rich and poor countries, likewise global conflicts. It states these problems appear due to globalisation, understood as global intensification in virtually all fields, of relations between individuals, human groups and countries. The text distinguishes between global (occurring at a global level) and globalisation (something affecting economics, communications, and the world of ideas, customs, i.e. life forms in such way dominant trends are established and evolve globally). Negative aspects of globalisation are highlighted, i.e. environment deterioration and enormous gap between rich and poor countries, likewise

positive such as creation of wealth, advance of freedom and democracy; and establishment of solidarity links between countries and their people. The text leads us to think we can feel more and more like world citizens and due to this growing interdependence, the attempts of certain countries or groups to survive and be successful separating themselves from the developed world are clearly condemned to failure. Moreover, it suggests that poverty in addition to individual suffering creates inequalities and political instability, often leading to violent conflicts and wars. We highlight three poverty related ideas. It indicates these conflicts are not always the responsibility of the countries themselves, and therefore correspond to the international community via their bodies, to intervene to keep the peace and safety (UN) or try people charged with genocide, war crimes or crimes against humanity (The Hague International Court).

It advocates a change of mentality for populations affected by corruption, old-fashioned thinking, and marginalisation of women or lacking education, so they leave behind certain traditional attitudes preventing them from adapting to the demands of the modern world. It finishes with the eight points against poverty called Millennium Development Aims proposed by the UN for 2015.

Book n. 2 published by Santillana, topic 9, entitled *Aiding development*, begins with the definition of development given by the UN General Assembly (1986), understood as a global economic, cultural, political and social process towards welfare based on free active meaningful participation in development and fair distribution of benefits derived from the same. It indicates on the contrary that reality demonstrates inequalities on the planet are ever greater. This introduction gives way to the following topics: distribution of wealth (distribution, Millennium Declaration, hunger in the world and answers), victims of wealth (women and development, poverty in childhood, child labour), new international order (globalisation and its effects, International Monetary Fund, International Co-operation for development, Humanitarian Aid Office). Regarding globalisation, it states that communication and economic dependence among countries has led to economic, political and social changes with global impact worldwide. We come across the following dichotomy: while initiatives are directed at flexibilising trade borders have progressed, mobility for human beings is becoming increasingly harder. This unit concludes with two sections. Firstly, the complete treaty on the Rights of the Child and the European Union position in relation to the same. Secondly, the section *Solidarity* presents the work done by the following NGOs: Action against Hunger, Manos Unidas and Oxfam Intermón. No specific reference found regarding citizenship in a global world.

Book n. 3 published by SM, the topic of citizenship in a global world is mentioned in different units. Apart from local (inhabitant of the town), national (pertaining to State in question) and European (European Union Member State) citizenship, world citizenship is defined. As to Human Rights, it states they are derived from our condition as people, not our nationality; furthermore, they

oblige us to exercise certain behaviours affecting all humanity regardless of race, colour, religion, wealth or culture. The text resorts to the idea of humanity to overcome wars, conflicts and persecutions; i.e. peace is only achievable by acknowledging we pertain to humanity, and therefore subject to the same rights and obligations. With regard to conflicts these are divided into local and global (hunger, global warming, etc.), also requiring global solutions. The process of globalisation itself is analysed from the perspective of human rights. In addition to the large contributions of globalisation, it talks about the risk still being mainly an economic process generating great social and political injustices (hunger, economic dependence, exploitation, North-South inequality, arrogance of multinationals towards States). In this sense, the book provides this other side of globalisation, i.e. delocalisation against human rights, the victims of delocalisation, and the World Social Forum Charter of Principles (Porto Alegre-2001). Against the risk of an exclusively economic globalisation, we have a solidarity or ethical globalisation which is more social and closer to the nations, meaning laws are fair everywhere, i.e. protection is the same for workers and democratic systems guarantee the freedom of citizens.

Book n. 4 published by Ibaizabal, in unit 6 entitled *Citizenship in a global world* under the heading *Globalisation and interdependence* states globalisation might be an opportunity for poor countries. Nevertheless, in practice it means an increase in wealth for some countries in detriment to the Third World. Anti-globalisation movements are mentioned which are the ones demanding cancellation of debt for developing countries and vindicate fairer relations, equal distribution of wealth, without forgetting other fields such as the culture of each country. In this way it introduces the following topics: poverty, sustainable development and rational consumption. Poverty is presented as a situation or way of life that appears when it is impossible to access the necessary resources to meet basic physical and psychical human needs or when they are lacking thereby leading to a deterioration in a person's standard of living. This situation, which affects 80% of the world population, has two protagonists: children and women. The Fourth World as a kind of poverty which excludes the welfare state for immigrants, the homeless or unemployed, ethnic minorities, drug addicts, etc. Sustainable development is related to the rational use of natural resources, with waste management and responsible consumption. This is presented as economic development that does not endanger the capacity of future generations to satisfy their needs. Agenda 21 is an action in favour of sustainability adopted by the ACBC²² in 2002, following the guidelines of the Rio de Janeiro Earth Summit (1992), a commitment that materialised between schools and Town Councils via the so-called Agenda Escolar 21. The third topic related to globalisation is consumption. Against consumerism (compulsive consumption), rational consumption, fair consumption and rational

²² CAPV – ACBC (Autonomous Community of the Basque Country).

management of leisure time is proposed. The last section deals with equality i.e. total absence of discrimination among human beings regarding their rights, a principle proclaimed in the Universal Declaration on Human Rights.

To conclude analysis of the sample contents analysed, we are going to refer to book n. 5 published in Basque by Erein. In this book, citizenship in a global world is dealt with in different units as a democratic-existence in the face of current problems. In this sense, it states education for citizenship should prepare future generations to act responsibly in the face of future demands, such as: violent conflicts, interculturalism, violation of human rights, xenophobia, racism, democratic participation, digital gap, information use and responsible management thereof, not to mention care and respect for the environment, etc. It also states citizenship should be a collective feeling, assuming environmental and social problems as one's own. We glean from the text that globalisation (in particular the economic process due to which national economies are ever more subordinate to a world market) has also had an impact on social relations. It highlights global solutions are required for this global world, therefore international agreements should be reached pacifically via the institutions or interlocutors created for the same (UN, UNICEF, UNESCO, Kyoto Protocol, NGOs, etc.). Furthermore, it refers to cultural relativism. It states that cultural difference and diversity are current problems, against which actions must be taken to avoid ethno-centric postures. It also refers to active citizenship, when reminding us not to forget the respect all citizens owe citizenship, and where we should express some universal principles.

In the books from the five publishers analysed, we found certain constants when defining the scenario to situate the concept of citizenship in a global world. The five use different procedures to approach the topic. Anaya uses geopolitics, Santillana the world of communication, SM politics, Ibaizabal social questions and Erein thought and questions related to behaviour as indicated in Table 3.

	N. 1 Anaya	N. 2 Santillana	N. 3 SM	N. 4 Ibaizabal	N. 5 Erein
1	geopolitics	communication	Politics	social matters	thought and behaviour
2	thought and behaviour	thought and behaviour	social matters	economy and finance	politics
3	communication	social matters	law and justice	consumption	economy and finance
4	economy and finance	politics	Geopolitics	geopolitics	communication
5	war and conflict	perceptions	economy and finance	environment	environment

Table 3. *Ranking of topics related to citizenship in a global world.*

The elements mentioned are common to all five publishers analysed; nevertheless, there are other concepts with greater weight in the books analysed, which to a certain extent indicate the trend marked by each publisher when making the need for a citizen conscience more tangible. In this sense, Anaya presents conflicts and wars (result of globalisation and exploitation of natural resources); Santillana, the world of perceptions (hunger, distribution and victims of wealth, new international order); SM law and justice (human rights and obligations, victims of globalisation and delocalisation); and Ibaizabal, consumption (poverty, sustainable development and rational consumption). There was an affinity in the autonomic publishers, Ibaizabal and Erein on giving importance to environment related topics, i.e. in their relationship with rational use of natural resources and the need for waste control.

Anyway, although we found common topics among the publishers regarding treatment of citizenship in a global world, they dealt with it differently. The five descriptors with greatest presence in descending order are: social matters, thought and behaviour, economy and finance, communication and geopolitics. Table 4 includes the most significant elements used in each book analysed for these five descriptors:

	Social matters	Thought and behaviour	Economy and finance	Communication	Geopolitics
N. 1 Anaya	Individuals, People, International Community, Humanity, Populations	Problems, Trends, Responsibility, Attitudes, Failure, Success, Corruption	Globalization Resource management	Mass media	International Global scale Earth Rich/poor countries
N. 2 Santillana	Welfare human beings woman	Humanitarian aid Justice	Globalization Wealth distribution Economic dependence	Mass media Millennium Declaration	Economic dependence among countries Effects on a global scale
N. 3 SM	Human beings People, Humanity, Solidarity, Employment and work, Globalisation risks	Human rights Social and political injustices	Economic Globalization De-localization Solidarity Globalization (ethics)	Social Forum Charter of Principles	Citizenship, (local, national, European) North-south Inequality Local globalisation

N. 4 Ibaizabal	Poverty Welfare Childhood/ woman Consumption Exhaustion of resources Justice	Deterioration Standard of living Equality in the face of discrimination of human beings	Globalization Waste management Time and leisure management Debt cancellation	Universal Declaration on Human Rights	Third World Developing countries Own culture World Summit Guidelines
N. 5 Erein	Education for citizenship	Non- discrimination Democracy experience Environmental sustainability. Civic duties Difference and diversity	Responsible management Economic globalisation World market National economy	Responsible information management International agreements	International relations Citizenship in a global world

Table 4. *Descriptor most frequently used by publishers.*

As a result of this analysis we can affirm the textbooks tackle social questions individually and collectively from a human rights perspective to compensate situations of marginalisation (childhood, women, labour questions, etc.); to put it in a nutshell risks due to globalisation and exhaustion of resources. In this sense, EREIN concentrates on eliminating these problems in exercising citizens' rights and duties and therefore the need for Education for citizenship stands out. The importance given to justice as a regulating element of social and cultural inequalities and discriminations is noteworthy when dealing with questions of behaviour and thought.

Although local textbooks follow the official curriculum, treatment of the topics dealt with is not identical. While some only treat globalisation from an economic viewpoint, others include the problems of sustainability and environment.

State books tackle global communication highlighting its importance while local centre their contents on the development of human rights and other international agreements.

State published books place citizenship at a global level, insisting on the economic reading of progress (rich and poor countries); however, local ones place more importance on the political exercise of citizenship at local, national and European level.

Conclusions

The main conclusions highlighted are that textbooks:

1. Correspond to the official curriculum: The textbooks analysed correspond to the current curriculum on the points related to citizenship in a global world, regarding competences, also aims and contents set forth on the different topics. Another very different matter is the solution presented by each publisher for the great cultural, political and social problems created by the so-called economic globalisations, hence the type of citizenship presented. They mention three concepts: citizenship of the world, citizens of the world and citizenship in a global world.
2. Are guided by Human Rights: There is insistence on the Declaration on Human Rights, since it presents universal values in the face of the current crisis thereof. The great dichotomy consists of differentiating real citizenship problems from the ideal experience which should be achieved if Human Rights were applied. I.e. by presenting the social problems of today's world, the Declaration on Human Rights is used as a solution guide in that it presents universal values. One understands that given the current crisis of values other more desirable values should be fostered and boosted. It goes from the defence of individual rights to those of different collectives or groups of people suffering from some kind of marginalisation, particularly economic; however, religious, gender and ethnic reasons are also dealt with. This marginalisation is represented among other things via manifestations of: racism, xenophobia, sexism, homophobia, poverty, discrimination due to age, disability, etc.
3. Mention the negative aspects of globalisation, i.e. environment deterioration and the enormous gap between rich and poor countries. We have evidenced that associated with individual and collective problems; globalisation is presented as the phenomenon which has accentuated the most negative aspects derived from uncontrolled production and wealth, since there are vast areas of the earth living under the threat of hunger and misery, atmospheric pollution and climate change, likewise nuclear energy expansion. We have found that due to the atrocious abuse of natural resources, the environment has become degraded resulting in great imbalances. Consequently there is emphasis on the one hand regarding the urgent need to execute sustainable development policies to tackle the serious problems of overpopulation, consumerism, exhaustion of natural resources and contamination. On the other hand, we come up against the consequences of armed conflicts which have favoured the revival of: pacifist non-violent and anti-military movements, conscientious objectors, refusal to do military service, and ecologists among others; likewise bodies such as international government organisations, i.e. NGOs, Co-operation Offices, etc., working in favour of

peace likewise attending and co-operating with collective groups who have suffered individual and collective aggressions due to armed conflicts.

4. Citizenship is understood as a proactive solidarity conscience: Generally speaking, we have found the publishers present economic progress and its globalisation as the economic process of catastrophic physical and personal consequences; and they resort to the citizenship mobilisation and participation based on solidarity. Although citizenship is understood as a proactive solidarity conscience, its political nature is removed, i.e. separated from the rights and obligations of belonging to a country. Thus these processes have been stripped of all their political connotation, centring the resolution of these conflicts on personal initiative and humanitarian labour, as opposed to civic conscience and transforming political commitment of this unfair reality.
 - The framework which sustains citizenship is essentially based on human solidarity and co-existence as the supreme value. We refer to equal social treatment which should be received by everyone on the planet at a social level (moreover, a highly desirable status, since the majority of people in this world do not receive this); and is a long way from political citizenship, which would confer the status of a political subject including the rights and obligations derived from the same and would require the support of political supranational frameworks.
 - A democratic experience is intended for this citizenship to produce a progressive transformation in people's values, attitudes and behaviours from the exercise of civic duties, fostering respect and value for diversity as a source of mutual enrichment.
 - Neither the LOE nor the teaching contents of the publishers of the textbooks analysed contemplate under any circumstance the Declarations of Collective Rights. When mentioning groups, they refer to those marginalised for economic, religious, gender or ethnicity reasons. This marginalisation is represented among others by manifestations of: racism, xenophobia, sexism, homophobia, poverty, age discrimination, disability discrimination, etc.

We can affirm development and violent conflicts are the two arguments where the idea of a 'global citizenship' is contextualised, insofar as all human beings are affected regardless of origin or race. This leads to the vindication of an aseptic citizenship, world citizenship, i.e. a citizenship which does not commit insofar as it is not real. So-called world citizenship does not exist, since there is no world-state, and citizenship is concept directly related to a nation-state, likewise the rights and duties derived from and for this.

5. Cosmopolitan citizenship? The books analysed present an ideal cosmopolitan citizenship, i.e. citizens of the world, although it is not generalizable. This hypothesis disguises the true reality of the cosmopolitan concept of cultural elite or economically privileged whose only passport is money or mastery of several

languages or sufficient cultural baggage to blend in and therefore move fluidly in privileged environments of decision and power. Cosmopolitan citizenship is not guaranteed if only a minority exercise it. For this kind of citizenship to occur, all citizens should be included in this world, not just anyhow but as political subjects where difference does not mean marginalisation, but rather respect for the same, mutual enrichment and equality.

If as Castells sustains throughout his work, the need to create a citizenship closer to communities of origin is emerging in this information society, as a source of life experience and meaning; then we feel we should be talking about contents reflecting a citizenship also linked to cultural rights, ergo to identities derived from these belongings. This is something which more open societies and political structures demand, whose starting point is precisely the respect for differences. If in a globalised society, digital networks daily break barriers, and migratory movements cross frontiers in time to trade and labour flows, the concept of traditional citizenship associated with State-nation becomes obsolete, although it is still current. This citizenship model only corrects its fellow patriots politically, thereby generating exclusion, sometimes socially, but always politically of course. We believe it aims to create political co-existence framework, not merely social, where situations of rejection, inequality and exclusion have no room.

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*Critical Reviews
and Bibliography*



Rassegne critiche,
Discussioni e Bibliografia

Critical Reviews / Rassegne critiche

I Musei della scuola e dell'educazione e il patrimonio storico-educativo. Una discussione a partire dall'esperienza del Museo della scuola «Paolo e Ornella Ricca» dell'Università degli Studi di Macerata*

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School museums, museums of education and historical educational heritage. A discussion from the experience of the «Paolo and Ornella Ricca» School Museum of the University of Macerata

ABSTRACT: This is a revised and expanded version of the article submitted in Spanish to the VI Scientific Conference of the Spanish Society for the Study of Historical-Educational Heritage on the topic *Pedagogia museística: Prácticas, usos didácticos e investigación del patrimonio educativo*, held in Madrid on 22-24 October 2014. It first describes the cultural and scientific context of the need to develop educational actions around the historical educational heritage that are increasingly targeted and diversified. The authors then focus on the analysis of educational experiences developed at the School Museum of Macerata during its first two years of public activity, to offer a contribution to the current debate on the new scenarios that characterize the restoration and enhancement of historical educational heritage.

EET/TEE KEYWORDS: History of Education; School Museum; Cultural Heritage; Citizenship Education; Italy; XX Century.

* Nel presente articolo si propone in una versione rivista e ampliata, il contributo presentato in

1. *Il patrimonio storico-educativo tra ricerca e didattica*

L'ultima stagione evolutiva della ricerca storico educativa, com'è noto, ha visto lo spostamento del baricentro d'interesse dalle teorie e idee pedagogiche alle pratiche educative¹; uno spostamento, questo, che in anni più recenti ha determinato un cambiamento ulteriore, nell'ambito del quale la storia dell'educazione ha avviato un'indagine profonda dei processi educativi non solo ai fini dell'avanzamento della conoscenza propriamente accademica, ma anche ai fini di una disseminazione più ampia dei risultati della ricerca, di cui si va scoprendo l'alto potenziale formativo, etico-civile e culturale². In particolare, da un decennio a questa parte, sta emergendo sempre più chiaramente come, seguendo le tracce del patrimonio storico della scuola e, più in generale, del patrimonio storico-educativo³, si possono attivare significativi percorsi formativi, rivolti a una vasta gamma di pubblici, diversi per età, esigenze di vita e condizioni socio-economiche, che consentono di acquisire una consapevolezza profonda del ruolo svolto dalla scuola nel passato dei singoli e delle comunità, rimettendo al centro la storia della scuola non come disciplina di un settore di

lingua spagnola alla VI Jornada Científicas de la Sociedad Española para el Estudio del Patrimonio Histórico-Educativo sul *Pedagogia museística: Prácticas, usos didácticos e investigación del patrimonio educativo*, tenuta a Madrid dal 22 al 24 ottobre 2014. L'articolo è frutto di una stretta collaborazione tra le autrici; tuttavia si precisa che: Anna Ascenzi è responsabile in particolare della stesura dei paragrafi 1 e 4 ed Elisabetta Patrizi di quella dei paragrafi 2 e 3.

¹ Cfr. D. Julia, *La culture scolaire comme objet historique*, in A. Novoa, M. Depaepe, E.W. Johanninger (edd.), *The Colonial Experience in Education. Historical Issues and Perspectives*, «Paedagogica Historica», Supplementary Series, vol. I, 1995, pp. 353-382. Da segnalare che del fondamentale e noto articolo di Julia è stata pubblicata, oltre alla traduzione in lingua spagnola (*La cultura escolar como objeto histórico*, in M. Menegus, E. González, *Historia de las Universidades modernas en Hispanoamérica, Métodos y fuentes*, Mexico, Universidad Nacional Autónoma de México, 1995, pp. 131-153), una versione rielaborata ed ampliata in lingua italiana: *Riflessioni sulla recente storiografia dell'educazione in Europa: per una storia comparata delle culture scolastiche*, «Annali di storia dell'educazione e delle istituzioni scolastiche», 1996, n. 3, pp. 119-147.

² Un chiaro e interessante quadro dei cambiamenti e delle nuove prospettive di ricerca che hanno interessato la storia dell'educazione nell'ultimo ventennio è stato recentemente tracciato da J. Ruiz Berrio, *Historia y museología de la educación. Despegue y reconversión de los museos pedagógicos*, «Historia de la educación», vol. 25, 2006, pp. 271-290, in partic. pp. 271-280.

³ La categoria di *patrimonio storico-educativo* si è affermata di recente ed è subentrata ad altre categorie precedentemente utilizzate soprattutto per descrivere beni di natura prevalentemente scolastica, come quelle di *patrimonio culturale della scuola*, *patrimonio storico-scolastico* e *patrimonio dei beni culturali scolastici*. La categoria di patrimonio storico-educativo ha un'accezione semantica più ampia, in quanto descrive il «complesso dei beni materiali e/o immateriali fruiti e/o prodotti in contesti educativi formali e/o non-formali nel corso del tempo». J. Meda, *La conservazione del patrimonio storico-educativo: il caso italiano*, in J. Meda, A.M. Badanelli (edd.), *La historia de la cultura escolar en Italia y en España balance y perspectivas. Actas del I workshop Italo-Español de Historia de la Cultura Escolar (Berlanga de Duero, 14-16 de noviembre de 2011) / La storia della cultura scolastica in Italia e in Spagna: bilancio e prospettive. Atti del I workshop italo-spagnolo di storia della cultura scolastica (Berlanga de Duero, 14-16 novembre 2011)*, Macerata, eum, 2013, pp. 166-173 (citazione a p. 169).

ricerca minoritario, ma come chiave di volta per comprendere e rivitalizzare l'identità culturale di una collettività.

Come ha rilevato in un recente contributo Augustín Escolano Benito, «los restos arqueológicos de la escuela» non sono solo gli 'strumenti del mestiere' dello storico dell'educazione, ma rappresentano anche una risorsa ancora tutta da esplorare nella sua valenza formativa per le singole comunità, in quanto oggetti catalizzatori di domande di tipo etnografico⁴. Difatti, se adeguatamente trattati, «los objetos, imágenes, textos y voces que componen el patrimonio material e inmaterial de la escuela»⁵, in quanto parte di un'esperienza universale che accomuna trasversalmente Paesi di diverse tradizioni, possono permettere di attivare significative esperienze di riscoperta della memoria individuale e collettiva, divenendo base solida per una formazione culturale e alla cittadinanza, strutturata attorno a una consapevolezza profonda delle proprie radici⁶. Questo nuovo scenario mostra come alla storia dell'educazione sia richiesto oggi un compito 'più alto' e articolato, che non si limita alla sola ricerca d'archivio e all'interpretazione delle fonti, ma che pone davanti alla sfida non semplice del farsi conoscere all'esterno della propria comunità di addetti ai lavori, per attivare dei circuiti virtuosi di educazione al patrimonio storico-educativo, quale parte integrante di un patrimonio culturale di tutti che voglia essere autentico fondamento di un'educazione alla cittadinanza attiva e consapevole⁷.

In questa direzione, si possono registrare all'attivo già diverse esperienze educative di grande interesse, che mostrano come il patrimonio storico-educativo si presta a una varietà potenzialmente infinita di occasioni formative, declinabile in attività, iniziative e progetti anche molto diversi per tipologia, finalità e soggetti coinvolti.

Abbiamo progetti di natura precipuamente didattica rivolti in modo specifico al mondo della scuola, alcuni anche realizzati con finanziamenti europei, come

⁴ A. Escolano, *La cultura material de la escuela y la educación patrimonial*, «Educatio Siglo XXI», vol. 28, n. 2, 2010, p. 44. Del filone di ricerca relativo alla *materiality of schooling* o *cultura material de la escuela* o *etnohistoria* ci limitiamo a ricordare in questa sede il volume curato da Augustín Escolano Benito (ed.), *La cultura material de la escuela. En el centenario de la Junta para la Ampliación de Estudios, 1907-2007*, Berlanga de Duero, Soria, 2007.

⁵ Escolano, *La cultura material de la escuela*, cit., p. 44. Sulle categorie di beni costituenti il patrimonio storico-educativo si veda Meda, *La conservazione del patrimonio storico-educativo*, cit., pp. 167-173.

⁶ Il rapporto tra patrimonio materiale e immateriale della scuola, storia e memoria è stato oggetto di particolare attenzione negli ultimissimi anni. Ci limitiamo a richiamare i recenti contributi di A. Viñao Frago, *Memoria, patrimonio y educación*, «Educatio Siglo XXI», vol. 28, n. 2, 2010, pp. 17-42; e Id., *La historia material e in material de la escuela: memoria, patrimonio y educación*, «Educação», Porto Alegre, vol. 35, n. 1, jan./abr. 2012, pp. 7-17.

⁷ Sul tema del patrimonio storico-educativo come strumento di educazione alla cittadinanza rimandiamo a: M. Brunelli, E. Patrizi, *School museums as tools to develop the social and civic competencies of European citizens. First research notes*, «History of Education & Children's Literature», vol. VI, n. 2, 2011, pp. 507-524.

PAT.H.S. Parcours PATrimonium Historiae Scholarum. L'École est notre Patrimoine / Percorsi PATrimonium Historiae Scholarum. La Scuola è il nostro Patrimonio, un progetto approvato nell'ambito del Lifelong Learning Program, sottoprogramma Partenariato Comenius Regio. Il progetto *PAT.H.S.*, realizzato nel 2009-2011, ha coinvolto gli alunni e i docenti di alcuni istituti scolastici storici di Torino e Lione, i quali hanno sviluppato percorsi paralleli di conoscenza e valorizzazione del patrimonio culturale del loro territorio, incentrati proprio sulla storia della scuola, rispettivamente, italiana e francese e sulla ricostruzione della storia del proprio istituto scolastico, realizzata attraverso un lavoro di reperimento e scavo di fonti e testimonianze, che ha permesso di costituire musei scolastici all'interno di ciascuno degli istituti partner e di dar vita a un progetto di museo scolastico diffuso nel comune di Torino⁸.

Non mancano, poi, esempi di proficuo connubio tra attività di ricerca storico-educativa e sperimentazione di nuove proposte didattiche, come il progetto CEIMES – *Ciencia y Educación en los Institutos Madrileños de Enseñanza Secundaria, 1837-1936*, finanziato dalla Dirección General de Universidades e Investigación de la Consejería de Educación de la Comunidad de Madrid e realizzato nel triennio 2008-2011. Muovendo dallo studio dell'ingente patrimonio custodito nelle biblioteche e nei gabinetti scientifici dei sei istituti di scuola secondaria più antichi di Madrid, gli storici dell'educazione, della scienze e dell'età contemporanea di tre università madrilene (Complutense, UNED, Autónoma), dell'Università di Alcalá de Henares e dell'Università di Parigi VI hanno lavorato di concerto con altre professionalità per raggiungere un triplice obiettivo: salvaguardare il patrimonio educativo e scientifico di questi istituti attraverso la realizzazione di un museo pedagogico virtuale; realizzare studi su strumenti, modalità didattiche e protagonisti (alunni e professori) che hanno caratterizzato la storia degli istituti tra Otto e Novecento; sviluppare attività e materiali per una didattica della scienza condotta a partire dalle fonti conservate negli istituti e fondata sui risultati conseguiti dalle attività di ricerca condotte nell'ambito del progetto⁹.

⁸ Ulteriori informazioni sul progetto *PAT.H.S.* sono disponibili nel sito del Comune di Torino *Museiscuola@*, in particolare: <http://www.comune.torino.it/museiscuola/forma/biblio/biblio_base/progetto-paths-2.shtml>; nello stesso sito si veda il contributo di approfondimento di Daniele Lupo Jallá intitolato *Per un museo scolastico diffuso*, <http://www.comune.torino.it/museiscuola/forma/biblio/biblio_base/per-un-museo-scolastico-diffuso-la-scuola-un-luogo.shtml>; per l'accesso ai materiali e alle notizie relative ai musei della scuola realizzati e *in fieri*: <<http://www.comune.torino.it/museiscuola/partecipa/index.shtml>>; per consultare e scaricare il manuale del progetto <<http://www.comune.torino.it/museiscuola/bm~doc/version-ital-ok.pdf>> (ultimo accesso: 16 giugno, 2014).

⁹ Il Museo virtuale del progetto CEIMES è consultabile liberamente all'interno del sito del progetto: <<http://www.ceimes.es/>> (ultimo accesso: 16 giugno, 2014). Per un approfondimento su finalità e risultati raggiunti dal progetto CEIMES, oltre ai materiali presenti nel sito, si rimanda ai contributi del numero monografico della rivista «Arbor Ciencia, Pensamiento y Cultura», vol. 187, n. 749, mayo-junio 2011, curato da L. López-Ocón e M. Pedrazuela ed intitolato *La enseñanza secundaria en construcción a través de los institutos históricos madrileños*.

Rimarchevoli, infine, sono pure i risultati raggiunti nell'ambito di esperienze di carattere multidisciplinare che hanno permesso di sperimentare le potenzialità 'terapeutiche' dei ricordi di scuola. Emblematica in questo caso è l'esperienza promossa presso il CEINCE (Centro Internacional de la Cultura Escolar) di Berlanga de Duero nel 2009, in collaborazione con l'équipe dell'Associazione dei familiari di malati di Alzheimer di Soria (psicologi, medici, terapeuti, assistenti sociali), nel corso della quale sono state realizzate attività di stimolazione dei residui di memoria di un gruppo di persone malate di Alzheimer mediante suoni, immagini e oggetti legati al loro passato scolastico. Il contesto educativo è stato ricreato negli spazi museali del CEINCE ed è stato strutturato a partire dai materiali in esso conservati. I risultati ottenuti sono stati apprezzabili sia per i singoli, che hanno mostrato sensibili segni di recupero di ricordi del proprio passato, sia per l'insieme delle persone coinvolte in questa esperienza, che hanno potuto condividere le loro memorie di scuola in una sorta di «narratorio colectivo», caratterizzato da intensi momenti di socializzazione¹⁰.

Il campo di applicazione dell'educazione al patrimonio storico-educativo, come si può evincere dagli esempi appena richiamati, è molto vasto e presenta anche ambiti di 'frontiera' di grande rilievo, le cui potenzialità meriterebbero di essere esplorate più a fondo sia in contesti educativi formali, dunque all'interno degli istituti di istruzione pubblica e privata di ogni ordine e grado, sia in contesti educativi non formali, ambito nel quale dovrebbero giocare un ruolo più incisivo, in ragione dello loro particolari caratteristiche, soprattutto i musei della scuola e dell'educazione¹¹.

2. Per una nuova educazione alla cittadinanza: il Museo della scuola «Paolo e Ornella Ricca» di Macerata

Tra le diverse tipologie museali di interesse storico-educativo¹², i musei della scuola e i musei dell'educazione sono quelli che per statuto, se così vogliamo

¹⁰ A. Benito Escolano, *La cultura material de la escuela y la educación patrimonial*, «Educatio Siglo XXI», vol. 28, n. 2, 2010, pp. 59-61; ora anche in Id., *Sherlock Holmes goes to school. Ethnohistory of the school and educational heritage*, «History of Education & Children's Literature», vol. V, n. 2, 2010, pp. 29-32.

¹¹ I *musei della scuola* e i *musei dell'educazione* tendono ad essere compresi in un'unica tipologia, tuttavia va precisato che nei primi sono accolti solitamente beni legati in via preferenziale alla realtà scolastica, mentre i secondi si propongono di «rappresentare i processi educativi nel loro complesso, anche se promossi da altre agenzie educative». Si veda Meda, *La conservazione del patrimonio storico-educativo*, cit., pp. 188-189.

¹² Oltre ai musei della scuola e dell'educazione, possiamo individuare altre quattro principali tipologie museali di interesse storico-educativo: i *musei didattici e/o scolastici*, che raccontano la storia di un istituto scolastico o accolgono collezioni scientifiche storiche di un istituto scolastico; i *musei pedagogici*, di matrice ottocentesca, che furono concepiti come dei veri e propri gabinetti

dire, si propongono di unire ai criteri di rigore scientifico applicati ai processi di conservazione e catalogazione dei materiali che accolgono, anche attività di tipo educativo che, proprio perché fondate anch'esse su una solida ricerca storico-educativa, dovrebbero rifuggire da quei processi di identificazione emozionale nostalgica e stereotipata che il patrimonio storico-educativo tende a suscitare, per stimolare un approccio critico e problematico nei riguardi di quell'immaginario scolastico ed educativo che il patrimonio in essi conservato evoca e rappresenta¹³.

In ambito italiano possiamo ormai contare su un numero notevole di musei della scuola e di musei dell'educazione, molti dei quali sono di matrice universitaria¹⁴. Uno degli ultimi nati, che rientra proprio in quest'ultima tipologia, è il Museo della scuola «Paolo e Ornella Ricca» dell'Università degli Studi di Macerata.

pedagogici e dei quali in Italia rimane solo il Museo pedagogico della Scuola magistrale «Niccolò Tommaseo» di Cagliari; i *musei dell'infanzia*, dedicati al mondo pre-scolare, che sono presenti soprattutto in Gran Bretagna; le *aule-museo* e le *scuole-museo*, allestite principalmente con scopi di natura prettamente espositiva; i *musei demo-etno-antropologici*, che spesso presentano al loro interno ricostruzioni di vecchie aule scolastiche, allo scopo di 'raccontare' le varie dimensioni della storia culturale di un determinato luogo. *Ibid.*, pp. 185-193.

¹³ Cfr. M. Somoza Rodríguez, *Museología de la educación: divulgación cultural, atractivo turístico o práctica historiográfica?*, in Badanelli, Meda (edd.), *La historia de la cultura escolar*, cit., in partic. pp. 150-166.

¹⁴ Tra i musei della scuola e dell'educazione italiani di matrice universitaria possiamo ricordare: il *Museo storico della didattica* «Mauro Laeng» dell'Università degli Studi Roma Tre (istituito nel 1986), il *Museo dell'educazione dell'Università degli Studi di Padova* (istituito nel 1993), il *Museo della scuola* «Paolo e Ornella Ricca» dell'Università degli Studi di Macerata (istituito nel 2009) e il *Museo della scuola e dell'educazione popolare* dell'Università degli Studi del Molise (istituito nel 2013). Di rilievo per il patrimonio storico-educativo conservato e per la tipologia di attività scientifiche ed educative promosse sono: il *Museo della scuola - Schulumuseum di Bolzano* (istituito nel 1993), il *Museo della scuola e del libro per l'infanzia della Fondazione Tancredi di Barolo* di Torino (istituito nel 2004) e il *Museo didattico e della didattica di Piacenza* presso l'Archivio di Stato di Piacenza (istituito nel 2006). Per un censimento completo dei musei di interesse storico-educativo italiani si rimanda alla mappa interattiva curata da Juri Meda, Marta Brunelli ed Elisabetta Patrizi in: <<http://www.unimc.it/cescom/en/museum/italian-school-museum-network>> (ultimo accesso: 17 giugno, 2014).

UNIVERSITÀ DEGLI STUDI DI MACERATA

CONVEGNO INTERNAZIONALE

QUADERNI DI SCUOLA

UNA FONTE COMPLESSA PER LA STORIA DELLE MULTIDISCIPLINARITÀ
E DEI COSTUMI EDUCATIVI TRA OTTOCENTO E NOVECENTO
(Macerata, 26 - 29 settembre 2007)

MERCOLEDÌ 26 SETTEMBRE 2007
Polo didattico «Paolo e Ornella Ricca», Contrada Vallebona
Incontro mattutino ore 9.00-11.30

- Saluti alle autorità
- Incontro introduttivo dell'On. Giuseppe Fiorini (Presidente della Pubblica Istruzione)
- Incontro generale
- Incontro finale

Incontro plenario ore 11.30-14.30
La sessione sarà aperta da un breve parallelismo

- Sessione «La scuola come...»
- Sessione «La scuola e...»

VENERDÌ 28 SETTEMBRE 2007
Polo didattico «Paolo e Ornella Ricca», Contrada Vallebona
Incontro mattutino ore 9.00-11.30

- Sessione «La scuola come...»
- Sessione «La scuola e...»

Incontro plenario ore 11.30-14.30
La sessione sarà aperta da un breve parallelismo

- Sessione «La scuola come...»
- Sessione «La scuola e...»

GIOVEDÌ 27 SETTEMBRE 2007
Polo didattico «Paolo e Ornella Ricca», Contrada Vallebona
Incontro mattutino ore 9.00-11.30

- Sessione «La scuola come...»
- Sessione «La scuola e...»

Incontro plenario ore 11.30-14.30
La sessione sarà aperta da un breve parallelismo

- Sessione «La scuola come...»
- Sessione «La scuola e...»

SABATO 29 SETTEMBRE 2007
Polo didattico «Paolo e Ornella Ricca», Contrada Vallebona
Incontro mattutino ore 9.00-11.30

- Sessione «La scuola come...»
- Sessione «La scuola e...»

Incontro plenario ore 11.30-14.30
La sessione sarà aperta da un breve parallelismo

mostrare

GIOVEDÌ 27 SETTEMBRE 2007 - ORE 16.00
Polo didattico «Paolo e Ornella Ricca», Contrada Vallebona

Inaugurazione delle mostre:

- Lezioni di storia nel Novecento, a cura delle Carine Paola Pigna e P. A. (Polo didattico «Paolo e Ornella Ricca», Contrada Vallebona)
- Tra libri e quaderni. Storia di Paolo e Ornella Ricca e dei suoi libri
- Le culture dei quaderni da scuola, a cura di Henry Arsenio (Università degli Studi di Roma)
- Il partito Fascista dell'On. Francesco Ruffini (Istituto per i libri e la stampa Culturale)

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Fig. 1. Locandina del Convegno internazionale *Quaderni di scuola* (Macerata, 26-29 settembre 2007).

Costituito ufficialmente con D.R. del 21 dicembre 2009 n. 1250 come diretta emanazione del *Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia* dell'Ateneo maceratese¹⁵, il Museo della Scuola «Paolo e Ornella Ricca» in realtà è frutto di un progetto che affonda le sue radici in due importanti mostre realizzate qualche anno prima. Nello specifico, si fa riferimento alla mostra *Tra banchi e quaderni*, curata da Paolo Ricca e allestita presso gli Antichi Forni di Macerata dal 27 settembre al 27 ottobre in occasione del Simposio Internazionale *School Exercise Books. A Complex Source for a History of the Approach to Schooling and Education in the 19th and 20th Centuries*, tenutosi a Macerata nei giorni 26-29 settembre 2007¹⁶; e alla mostra *Tra i banchi di scuola. Vita scolastica italiana tra Otto e Novecento*, curata da Roberto Sani e Juri Meda e allestita presso i locali dell'ex-Liceo classico di Civitanova Alta dal 10 luglio al 6 settembre 2009, nell'ambito delle iniziative promosse nella cittadina marchigiana durante la Biennale *Tutto in gioco*.

Entrambe le mostre furono realizzate sulla base dei materiali scolastici della straordinaria collezione costituita con impegno e passione nel corso di un'attività di ricerca e raccolta pluriennale da Paolo e Ornella Ricca. A seguito di questi due eventi maturò la consapevolezza all'interno dell'Ateneo di Macerata della necessità di accogliere in uno spazio espositivo permanente i materiali della collezione Ricca, che con uno straordinario ancorché raro atto di generosità fu donata dai coniugi Ricca all'Università di Macerata affinché venisse messa a disposizione della cittadinanza e in particolar modo delle giovani generazioni. Questo lungimirante gesto di generosità ha dato il via ad un virtuoso meccanismo di acquisizioni che dal 2009 ad oggi ha consentito al Museo di entrare in possesso con diverse modalità (donazione, deposito, comodato d'uso gratuito) di numerosi fondi librari, documentari e/o misti, qualitativamente pur se non quantitativamente analoghi a quello originale¹⁷.

Dopo un lungo e complesso lavoro di riordino e di catalogazione dei fondi costitutivi del Museo si è arrivati all'inaugurazione ufficiale dell'8 giugno 2012, una data questa che, possiamo dire, ha segnato l'avvio di una nuova stagione per il Museo della scuola «Paolo e Ornella Ricca», contrassegnata dalla volontà di affiancare al lavoro di studio e di ricerca condotto sui fondi che sono entrati a far parte del Museo, quello di valorizzazione degli stessi attraverso azioni di

¹⁵ Cfr. M. Brunelli, *The «Centre for the documentation and research on the history of textbooks and children's literature» in the University of Macerata*, «History of Education & Children's Literature», vol. IV, n. 2, 2009, pp. 441-452.

¹⁶ Del convegno maceratese sono stati pubblicati gli atti: J. Meda, D. Montino, R. Sani (edd.), *School exercise books: a complex source for a history of the approach to schooling and education in the XIX and XX centuries*, 2 voll., Firenze, Polistampa, 2010.

¹⁷ Per una descrizione dei principali fondi librari e documentari del Museo della scuola «Paolo e Ornella Ricca» si rinvia al sito ufficiale del Museo e del Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia: <<http://www.unimc.it/cescom/it/il-centro/fondi>> (ultimo accesso: 27 giugno, 2014).

disseminazione diversificate, progettate per raggiungere da un lato la comunità accademica, per tramite di giornate di studio, seminari, convegni, progetti di ricerca e pubblicazioni¹⁸, e, dall'altro, il mondo della scuola, degli studenti universitari e, più in generale, la cittadinanza, attraverso una variegata gamma di iniziative di carattere formativo volte a promuovere a più livelli, come recita il *Regolamento* del Museo, «la conoscenza delle origini e degli sviluppi del sistema formativo e delle istituzioni scolastiche dell'Italia unita»¹⁹, quale fondamento del bagaglio culturale ed identitario dei singoli cittadini e dell'intera comunità civile.

Su quest'ultimo fronte il Museo della scuola «Paolo e Ornella Ricca» ha all'attivo ormai due anni accademici di sperimentazione (a.a. 2012-2013 e a.a. 2013-2014), nel corso dei quali sono state progettate e attuate diverse esperienze, sviluppate sulla scorta dell'ampia e ricca gamma di materiali accolti nel Museo, che spazia dai libri di testo e di lettura ai periodici per l'infanzia e la gioventù²⁰, dai quaderni e diari scolastici agli albi di disegno e coloritura agli strumenti di scrittura, dalle carte geografiche ai tabelloni didattici e, che, infine, dispone di altre suppellettili ed elementi di arredo scolastico (di cui si segnala la presenza di una collezione di banchi di scuola, che va dalla fine dell'Ottocento ai giorni nostri), tra i quali spicca una pluriclasse degli anni Trenta del Novecento che, allestita con rigore filologico per offrire uno spaccato della scuola del tempo, campeggia al centro del Museo e ne rappresenta il vero e proprio cuore.

Attualmente il Museo della scuola «Paolo e Ornella Ricca» ospita la mostra permanente *Libro e moschetto scolastico perfetto: ideologia e propaganda nella scuola elementare del periodo fascista (1922-1943)*. La mostra, curata dal conservatore del Museo Juri Meda e allestita in occasione dell'inaugurazione del Museo, è dedicata alla scuola elementare del ventennio fascista ed è articolata in tre sezioni, che si propongono di ricostruire il vissuto scolastico del tempo: *il calendario*, sezione che si propone di descrivere le varie ricorrenze celebrative che ritmavano il tempo della scuola del regime; *le materie*, sezione che mostra come nel periodo fascista ogni disciplina fosse 'infarcita' di contenuti ideologici; *i valori*, sezione che fornisce un saggio di quella vera e propria 'religione politica'

¹⁸ Delle numerose iniziative promosse in questi ultimi anni ricordiamo: il workshop italo-spagnolo sul tema *Historia de La Cultura Escolar* svoltosi nel novembre 2011 presso il Centro Internacional de la Cultura Escolar di Berlanga de Duero (Spagna); e la *Giornata di studi sul patrimonio culturale delle scuole* organizzata a Macerata il 9 aprile 2014 per iniziativa del Museo della scuola «Paolo e Ornella Ricca» e del *Centro de Investigación MANES* della Universidad Nacional de Educación a Distancia (UNED) di Madrid.

¹⁹ Il regolamento del Museo della scuola «Paolo e Ornella Ricca» è liberamente consultabile presso il sito di cui sopra: <<http://www.unimc.it/cescom/it/il-museo/regolamento>> (ultimo accesso: 27 giugno, 2014).

²⁰ A questo riguardo si segnala che il patrimonio librario del Museo della scuola «Paolo e Ornella Ricca» e del Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia è consultabile all'interno del On-line Public Access Catalog (Opac) del Polo Maceratese <<http://opac.unimc.it/>>.



Fig. 2. L'aula pluriclasse del Museo della scuola «Paolo e Ornella Ricca».

che caratterizzò la scuola del Ventennio. Completa la mostra un'isola tematica incentrata sui *costumi scolastici* e i *materiali didattici*, ricreata all'interno dell'aula pluriclasse di cui sopra. Il percorso espositivo della mostra costituisce la base di riferimento per le attività di visite guidate e con approfondimenti tematici, che il Museo propone con regolarità dall'autunno del 2012.

È bene precisare che, in questa prima fase di avvio dell'offerta formativa del Museo, le attività a questa relative sono svolte dai professori, ricercatori, assegnisti, dottori di ricerca e dottorandi che afferiscono al *Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia*. Le attività di disseminazione del Museo sono pertanto svolte principalmente su appuntamento anche se, in quanto parte del Sistema Museale Provinciale maceratese e del network dei Musei Maceratesi, il Museo della scuola «Paolo e Ornella Ricca» garantisce dei giorni di apertura gratuita per il 'grande pubblico', in occasione di eventi come: il *Gran Tour dei Musei*, promosso dalla Regione Marche nei mesi di dicembre e maggio; il *Salone di orientamento universitario*, organizzato dall'Area per la Didattica, l'Orientamento e i servizi agli studenti dell'Ateneo maceratese a fine febbraio; e le *Giornate Europee del Patrimonio* che, nate per iniziativa del Consiglio d'Europa e della Commissione europea nel lontano 1991, si tengono ormai regolarmente a fine settembre.

In ottemperanza all'art. 2 del suo Regolamento, il Museo della scuola «Paolo e Ornella Ricca» ha orientato la sua offerta formativa verso quattro tipologie principali di pubblici: gli studenti dei corsi di laurea del Dipartimento di Scienze della Formazione, dei Beni Culturali e del Turismo dell'Ateneo di Macerata (al



Fig.3. Totem della mostra permanente *Libro e moschetto scolaro perfetto*.

quale il Museo afferisce), gli studenti della scuola secondaria superiore, quelli della scuola secondaria inferiore e gli alunni della scuola primaria. L'approccio che guida le varie iniziative proposte è di tipo operativo e partecipativo, e mira a favorire un confronto diretto con i 'reperti archeologici della scuola' accolti nel Museo, ponendoli al centro di ogni esperienza formativa proposta, non tanto come frammenti di un passato lontano, ma come 'oggetti vivi', da osservare, interrogare e interpretare, perché depositari di informazioni che aiutano a decifrare e comprendere meglio il presente²¹.

Al momento, per gli studenti universitari, oltre al regolare svolgimento di parte delle ore di lezione degli insegnamenti di storia dell'educazione, di storia della scuola e delle istituzioni educative e di educazione e interpretazione del

²¹ Per un quadro di riferimento sulle metodologie di educazione al patrimonio di tipo attivo e partecipativo si rimanda al manuale pratico per insegnanti *HEREDUC* (Heritage Education), realizzato nell'ambito dell'omonimo progetto finanziato dalla Comunità Europea all'interno del programma Socrates-Comenius 2.2 (2002-2004), e disponibile in diverse lingue (olandese, inglese, francese, tedesco e italiano) nel sito del progetto: <<http://www.hereduc.net>> (ultimo accesso: 28 giugno, 2014).

patrimonio presso il Museo, è al suo secondo anno di attivazione il progetto didattico intitolato *Per una storia della professionalità docente*, rivolto agli studenti del corso di laurea in Scienze della formazione primaria e realizzato all'interno delle attività formative del tirocinio indiretto, in stretto raccordo con i docenti supervisori del tirocinio²². Il progetto si propone di approfondire l'evoluzione della professionalità docente con particolare riferimento all'età contemporanea, mettendo a fuoco con l'ausilio della bibliografia specialistica e delle fonti materiali e documentali presenti nel Museo, i modi e le forme attraverso cui storicamente la figura dell'insegnante, ai diversi livelli d'istruzione, ha operato quale agente di costruzione della dimensione identitaria e della cittadinanza, nonché come strumento privilegiato per la promozione dell'inclusione sociale e dell'integrazione culturale, in modo da promuovere nelle future generazioni di insegnanti una coscienza storica rispetto al mestiere che andranno ad esercitare.

Agli studenti degli ultimi due anni della scuola secondaria superiore, invece, è stato dedicato il progetto *Officina scuola: protagonisti, strumenti e luoghi della cultura scolastica tra ieri e oggi*, del quale quest'anno sono state attivate le prime due edizioni²³. Sviluppato secondo la formula del laboratorio di approfondimento certificato, il progetto *Officina scuola* ha messo al centro la scuola del ventennio fascista, come elemento cardine per esplorare la metodologia e gli strumenti di lavoro dello storico dell'educazione. Attraverso l'analisi di fonti complesse e dense di significati come i quaderni di scuola, i manuali scolastici e i libri di lettura è stato indagato il nesso tra propaganda e scuola del Regime, appuntando l'attenzione su quegli elementi testuali ed iconografici che meglio seppero esprimere il forte tasso di ideologizzazione che interessò ed investì letteralmente le pratiche educative della scuola durante il ventennio.

Per gli alunni della scuola secondaria di primo grado è stato predisposto il laboratorio didattico *Dentro l'«aula oscura»*, finalizzato alla promozione di competenze di 'lettura' e di analisi di fonti iconografiche particolarmente suggestive e apparentemente semplici da interpretare come le fotografie²⁴. Attraverso attività di difficoltà progressiva, realizzate prima con il gruppo classe

²² Progetto didattico: *Per una storia della professionalità docente*, realizzato nei locali del Museo della scuola «Paolo e Ornella Ricca» e nelle aule del Dipartimento di Scienze della Formazione, dei Beni Culturali e del Turismo dell'Università degli Studi di Macerata negli anni accademici 2012-13, 2013-14; progettazione contenutistica a cura di R. Sani, A. Ascenzi, E. Patrizi; realizzazione didattica a cura di: R. Sani, A. Ascenzi, J. Meda, D. Caroli, E. Patrizi.

²³ Laboratorio di approfondimento certificato: *Officina scuola: protagonisti, strumenti e luoghi della cultura scolastica tra ieri e oggi*; realizzato presso i locali del Museo della scuola «Paolo e Ornella Ricca» nei giorni 18-21 febbraio 2014 e 11-14 marzo 2014; progettazione contenutistica e realizzazione didattica a cura di R. Sani, A. Ascenzi, E. Patrizi, D. Caroli, J. Meda e L. Pomante.

²⁴ Percorso didattico: *Dentro l'«aula oscura»: laboratorio sulle fonti fotografiche per la scuola secondaria di I grado*; realizzato il 4 febbraio e l'11 marzo 2014, progettazione contenutistica e realizzazione didattica a cura di M. Brunelli e J. Meda.

e poi per piccoli gruppi, e con il supporto di una scheda di pre-catalogazione, il laboratorio propone momenti di riflessione condivisa e spazi di lavoro attivo, basati sull'analisi di fotografie scolastiche possedute dal Museo e/o ritrovate dagli stessi alunni tra i ricordi di famiglia, guidando in questo modo gli studenti nell'acquisizione di competenze di osservazione e di analisi dell'immagine fotografica e stimolando in loro l'affinamento di capacità di riflessione/interpretazione applicabili anche alle varie immagini che possono incontrare nella vita di tutti i giorni.

Per i più piccoli e non solo, invece, è stato predisposto il percorso didattico intitolato *La scuola dei nonni*. Si tratta della proposta educativa 'storica' del Museo della scuola «Paolo e Ornella Ricca», quella che per prima è stata progettata e realizzata e che ormai può contare su tre anni di sperimentazione²⁵. Questo percorso didattico ha una struttura molto semplice ma di grande impatto, che permette ai soggetti coinvolti di vivere degli intensi momenti di confronto intergenerazionale, in quanto si propone di far conoscere ai bambini di oggi la scuola elementare del passato attraverso la mediazione di un testimone diretto, possibilmente un nonno o una nonna di un alunno della classe o una persona anziana qualsiasi. Il testimone viene interrogato dai bambini stessi sulla base di una batteria di domande predisposte in classe con il supporto del loro insegnante e racconta la sua esperienza scolastica giovandosi anche del supporto degli elementi di corredo scolastico che animano l'aula pluriclasse posta al centro del Museo della scuola. Rivolto principalmente agli alunni e alle alunne del secondo ciclo della scuola primaria (3°-5°), il percorso ha una connotazione valoriale, oltre che contenutistica, molto importante, poiché non solo consente al bambino di comprendere le molteplici differenze tra la scuola di un tempo e la scuola di oggi, ma permette anche di recuperare la memoria e il significato di quell'esiziale ruolo di 'testimone-narrante', assegnato tradizionalmente alle persone anziane all'interno delle comunità locali.



Fig. 4. Percorso didattico *La scuola dei nonni* (5 marzo 2013).

²⁵ Percorso didattico: *La scuola dei nonni*; progettazione contenutistica a cura di G. Gabrielli, J. Meda, G. Nuccelli, P. Olmetti, realizzato con la supervisione di J. Meda il 2 ottobre e il 13 dicembre 2012, il 5 marzo e il 17 aprile 2013, il 4 febbraio, l'8 aprile e il 13 maggio 2014.

Al termine del percorso didattico *La scuola dei nonni* viene proposto solitamente anche il laboratorio di calligrafia *Zampe di gallina*, nel quale si insegna agli studenti a scrivere con penna e calamaio, permettendo loro di cimentarsi direttamente con le regole di 'bella calligrafia' applicate nella scuola dei loro nonni. Da segnalare che il laboratorio è stato sperimentato anche con un gruppo di persone anziane che hanno svolto recentemente una visita guidata al Museo, dalle quali sono arrivati numerosi spunti di riflessione per l'integrazione e l'ampliamento dell'offerta formativa del Museo, con proposte formative e di ricerca ad hoc, pensate per e con le persone anziane²⁶. Tale direzione rappresenta certamente una delle linee progettuali che l'équipe del Museo della scuola «Paolo e Ornella Ricca» intende perseguire, in modo da potenziare quell'idea di «museum as a representation space of popular culture and educational memory»²⁷, verso la quale necessariamente ogni museo della scuola e dell'educazione che voglia proporsi come luogo di cultura e di condivisione di esperienze educative deve orientarsi, se vuole centrare l'obiettivo dei porsì 'oltre la conservazione'.

3. *Un bilancio sui primi due anni di attività del Museo della scuola «Paolo e Ornella Ricca» di Macerata*

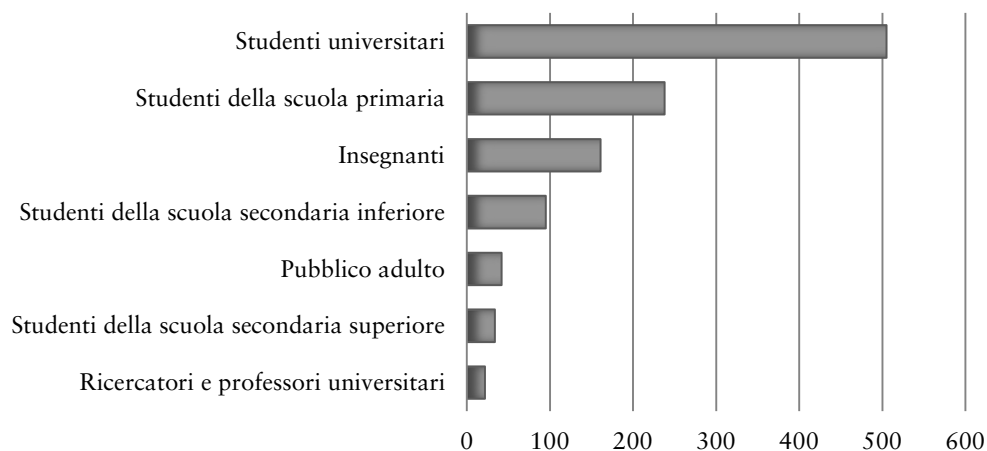
Nel corso di questi primi due anni accademici di attività al pubblico il Museo della scuola «Paolo e Ornella Ricca» ha accolto 1.097 utenti, di cui 414 nel 2012-2013 e 683 nel corrente anno accademico. Se prendiamo in esame la tipologia di utenti che hanno visitato e/o svolto attività nel Museo, notiamo che il 46% è costituito da studenti universitari, il 22% da alunni della scuola primaria, il 15% da insegnanti, l'8% da studenti della scuola secondaria inferiore, il 4% da pubblico adulto generico, mentre il 3% è rappresentato dagli studenti della scuola

²⁶ A questo riguardo, si segnala che il Museo della scuola «Paolo e Ornella Ricca» ha in progetto una campagna per la raccolta delle testimonianze orali sulla vita scolastica maceratese della prima metà del Novecento. Tale progetto intende coinvolgere *in primis* gli istituti scolastici del territorio marchigiano, al fine di: realizzare un'attività dal forte significato culturale; favorire esperienze che permettano agli alunni un confronto diretto con le fonti storiche orali; incentivare il confronto intergenerazionale e la coscienza del valore della memoria; e, non da ultimo, stabilire un saldo legame tra il Museo e il territorio. Gli esempi significativi di progetti di questo tipo sono diversi, per l'ambito italiano si segnalano due interessanti risorse presenti in rete: *Memoro: la banca della memoria* <<http://www.memoro.org/it/>> e *Nobits: il libro della memoria* <<http://nobits.it/home>> (ultimo accesso: 28 giugno, 2014).

²⁷ L'espressione è stata mutuata dal titolo di un recente lavoro di Cristina Yanes Cabrera, al quale si rimanda per un approfondimento sul ruolo sociale e culturale dei musei in generale e dei musei di interesse storico-educativo in particolare: C. Yanes Cabrera, *The museum as a representation space of popular culture and educational memory*, «History of Education & Children's Literature», vol. VI, n. 1, 2011, pp. 19-31.

secondaria superiore e il 2% da ricercatori e professori universitari che hanno trascorso giornate o periodi di studio presso il Museo e presso l'attiguo *Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia di Macerata*. Le diverse categorie di pubblici appena richiamate rispecchiano chiaramente le caratteristiche delle iniziative promosse dal Museo e dal Centro nel lasso di tempo considerato, che possiamo distinguere in due principali tipologie di attività: *attività strutturate*, che sono state calendarizzate e realizzate secondo un preciso programma (esercitazioni universitarie, percorsi didattici per la scuola primaria, laboratori didattici per la scuola secondaria inferiore, laboratori didattici per la scuola secondaria superiore, visite guidate rivolte ad insegnanti), e *attività non strutturate*, che sono state offerte su richiesta (visite guidate rivolte al pubblico adulto e visite scientifiche).

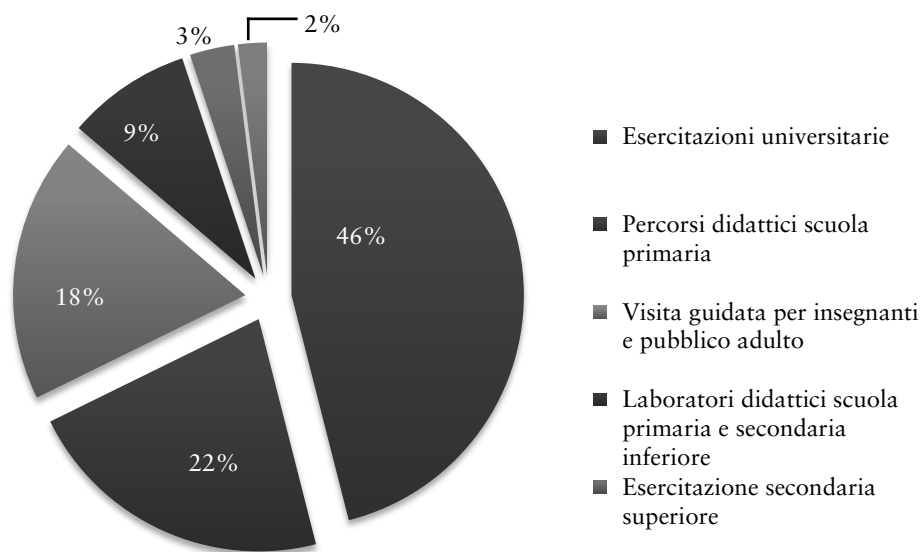
Tab. 1. Tipologia utenti



Il nucleo centrale del programma formativo del Museo è rappresentato dalle esercitazioni didattiche rivolte agli studenti universitari e dai percorsi didattici e laboratori indirizzati agli alunni della scuola primaria, che costituiscono rispettivamente il 46% e il 22% della complessiva offerta formativa sviluppata dal Museo in questi due anni accademici. In fase di lancio e di consolidamento, invece, sono i laboratori per la scuola secondaria superiore e per la scuola secondaria inferiore, che sono partiti in questo anno accademico e che in ragione di ciò, al momento rappresentano il 3% e il 9% delle attività formative realizzate dal Museo. Un discorso diverso va fatto per le visite guidate rivolte al pubblico adulto, che per la maggior parte, al momento, hanno coinvolto soprattutto i docenti della scuola primaria e secondaria inferiore. Il Museo ha scelto di rivolgersi a questa categoria di utenti con delle iniziative mirate di presentazione della propria offerta didattica, realizzate principalmente ad inizio e fine anno scolastico presso gli spazi del Museo e, ultimamente, anche

presso gli istituti scolastici, alle quali sono seguiti degli incontri mirati svolti con gli insegnanti che hanno deciso di portare le proprie classi al Museo, che risultano difficili da 'censire', in quanto il grado di interazione tra il personale del Museo e gli insegnati è variato sensibilmente a seconda del tipo di attività scelta dall'insegnante e dalle modalità con le quali questo ha deciso di inserirla all'interno del programma didattico della classe. Per quanto riguarda la presenza di ricercatori e professori universitari italiani e stranieri questa si deve a una delle iniziative ormai storiche del Museo della scuola «Paolo e Ornella Ricca» e del *Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia di Macerata*, ovvero la visita scientifica che, pensata come occasione di studio e di ricerca per quegli studiosi che vogliono conoscere gli spazi, le attività e soprattutto i fondi documentari e librari del Museo e del Centro, proprio per le sue caratteristiche di alta specializzazione, interessa un pubblico ristretto di studiosi e esperti del settore²⁸.

Tab. 2. Tipologia di attività svolte



²⁸ Da segnalare che nel corso del presente anno accademico è stato promosso il ciclo di Seminari internazionali *History of Education and Children's Literature in Europe: Topics, Institutions, Networks and Journals*, nell'ambito dei quali i colleghi stranieri che hanno trascorso soggiorni scientifici e di studio presso il Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia (CESCO) e il Museo della scuola «Paolo e Ornella Ricca» sono stati invitati a tenere interventi di presentazione/mappatura sullo stato dell'arte della ricerca storico-educativa del proprio paese, offrendo l'occasione per proficui spazi di confronto e scambio culturale. Tra i relatori che hanno preso parte a questa iniziativa ricordiamo: Milka Terziyska (Sofijski Universitet, Bulgaria), Juan Senís Fernández (Universidad de Zaragoza, Spagna) e Pablo Álvarez Domínguez (Universidad de Sevilla, Spagna).

Se dai numeri e percentuali volessimo passare ad una valutazione di tipo qualitativo delle attività di carattere propriamente formativo realizzate dal Museo negli anni accademici 2012-13 e 2013-14, al fine di comprenderne i punti di forza e gli aspetti da migliorare e/o da cambiare, potremmo affidarci alle informazioni che emergono da due fonti specifiche, vale a dire i *questionari di valutazione anonimi*, compilati dagli studenti che hanno preso parte alle esercitazioni universitarie e al laboratorio di approfondimento certificato *Officina scuola*, e gli elaborati realizzati dagli studenti che hanno partecipato ai percorsi didattici e ai laboratori. Per la prima tipologia di fonte disponiamo di 307 questionari, di cui 29 compilati dagli studenti del laboratorio *Officina scuola* e 278 dagli studenti universitari, rispetto ai quali va precisato che 110 provengono dal primo e secondo anno del corso di laurea quinquennale in Scienze della Formazione Primaria, 159 dal primo anno del corso di laurea triennale in Scienze dell'educazione e 9 dal corso di laurea magistrale in Scienze pedagogiche. Per la seconda tipologia di fonte, invece, disponiamo di 185 prodotti tra pensiero, temi, interviste e disegni, di cui 132 realizzati dagli alunni della scuola primaria e 53 dagli alunni della scuola secondaria inferiore²⁹. Questo materiale è attualmente conservato in un fondo appositamente costituito presso l'archivio del Museo della scuola «Paolo e Ornella Ricca», denominato *Fondo didattica museale*.

Rispetto alla prima tipologia di fonte va precisato che essa è stata somministrata agli studenti al termine di alcuni specifici momenti del percorso didattico svolto in classe. Nel caso degli studenti della secondaria superiore il questionario è stato compilato alla fine del primo incontro del laboratorio *Officina scuola*, che aveva l'obiettivo di introdurre gli studenti alla conoscenza del panorama delle fonti con le quali ha a che fare lo storico dell'educazione, portando loro il caso delle fonti utilizzare per allestire il Museo della scuola e, in particolare, la mostra permanente *Libro e moschetto scolaro perfetto*. Per quanto concerne gli studenti universitari, il questionario è stato sottoposto loro nell'ultima delle lezioni previste nel calendario didattico degli insegnamenti di storia dell'educazione e di storia della scuola e delle istituzioni educative, allo scopo di favorire una sperimentazione pratica delle cognizioni teoriche affrontate nel corso delle lezioni precedenti. Le esercitazioni rivolte a queste due tipologie di studenti sono state condotte seguendo un'impostazione simile, che prevedeva un momento introduttivo svolto in classe, nel corso del quale veniva offerta una presentazione del Museo e della mostra in esso ospitata, seguito dal momento di visita vera e propria del Museo, organizzato in due fasi, una di descrizione di alcuni aspetti specifici della mostra, individuati dal docente per integrare, precisare e sottolineare alcuni contenuti affrontati in classe, e uno

²⁹ Nel *Fondo didattica museale* sono attualmente conservati gli elaborati di tre classi prime della scuola secondaria inferiore e di 8 classi della scuola primaria, di cui tre classi prime, una classe seconda, tre classi terze e una classe quarta.

di esplorazione autonoma, nel quale allo studente veniva data la possibilità di conoscere il Museo, soffermandosi sugli aspetti che maggiormente colpivano la sua attenzione, e di porre domande al docente per chiarimenti e/o indicazioni di approfondimento. All'intero percorso sono state dedicate circa due ore, di cui 45 minuti di spiegazione teorica, 40 minuti di visita del Museo e 30 minuti circa dedicati all'esplorazione autonoma. Non sempre tuttavia è stato possibile rispettare questa tempistica, soprattutto nel caso delle esercitazioni rivolte agli studenti di Scienze della Formazione Primaria e di Scienze dell'educazione a causa dell'elevato numero degli iscritti a questi corsi di laurea, che ha reso difficile l'attuazione del proposito di lavorare con piccoli gruppi e tempi distesi.

È importante sottolineare che i 307 soggetti che hanno compilato il questionario lo hanno fatto su base volontaria; infatti, non tutti gli utenti che hanno partecipato alle esercitazioni lo hanno compilato, anche se la maggior parte ha scelto di farlo. Predisposto secondo una struttura molto semplice, che non si proponeva di entrare nel merito dei contenuti dell'esercitazione – in quanto sarebbero stati oggetto di valutazione in altra sede (esami per gli studenti universitari e prova finale per gli studenti della secondaria superiore), ma di comprendere le impressioni e riflessioni delle nuove generazioni sulle potenzialità del Museo, il questionario prevedeva cinque domande a risposta aperta: 1) *Prova a descrivere la visita al Museo utilizzando tre aggettivi e giustifica la tua scelta*; 2) *Descrivi brevemente le sensazioni, le emozioni e le riflessioni che ti ha suscitato la visita al Museo*; 3) *Sei soddisfatto dell'impostazione data alla visita al Museo? Motiva la tua risposta*; 4) *Fornisci alcuni suggerimenti per migliorare l'esperienza della visita al Museo pensando, in particolare, al target di utenza dello studente universitario*; 5) *Consigliaresti ad amici e conoscenti di visitare il Museo? Motiva la tua risposta ed indica la tipologia o le tipologie di utenti (ad es. bambini, adulti, persone anziane, insegnanti etc.) che ritieni più indicate per questa esperienza*.

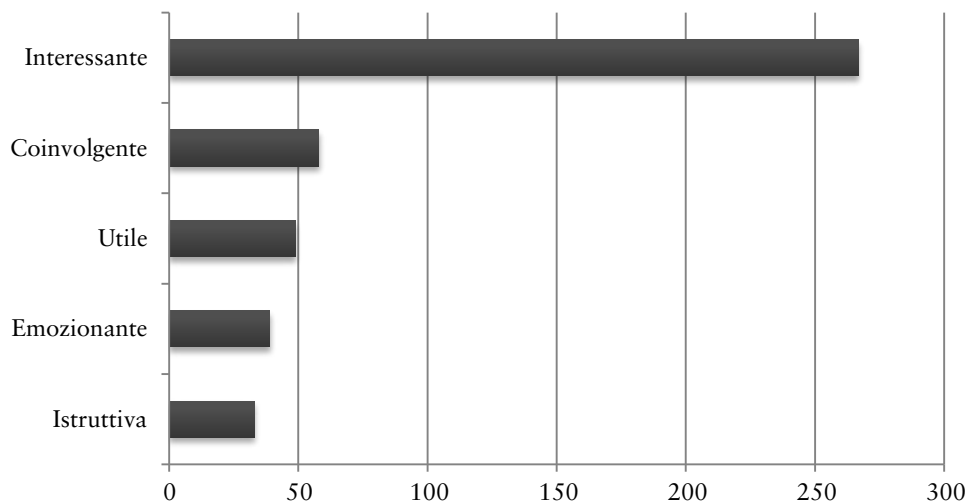
Alla prima domanda sia gli studenti della scuola secondaria superiore che gli studenti universitari hanno risposto scegliendo, in via preferenziale, tre aggettivi: *Interessante*, scelto da 267 persone su 307, *coinvolgente*, scelto da 58 persone su 307 e *utile*, scelto da 49 persone su 307. Se andiamo, poi, a considerare il tipo di argomentazioni date dagli utenti per spiegare le ragioni delle loro scelte, notiamo che la maggior parte degli studenti della secondaria superiore ci dice che la visita è stata *interessante* poiché: «permette di prendere concretamente coscienza del materiale e della disposizione dell'aula scolastica del passato»; «la varietà del materiale raccolto mi ha permesso di conoscere dei particolari che ignoravo»; «offre l'opportunità di percepire la distanza storica esistente tra noi e il passato». Tra gli studenti universitari, invece, le risposte si differenziano ed articolano in modo diverso, in quanto la maggior parte afferma che la visita è risultata interessante perché: «ci ha fatto capire realmente aspetti che abbiamo analizzato e approfondito a lezione»; «permette di osservare strumenti ed oggetti inerenti il mondo scolastico di un periodo

storico diverso da quello attuale»; «suscita curiosità e ti fa venire voglia di sapere di più»; «incentrata su argomenti dei quali non si parla più nemmeno nei documentari, in quanto sono considerati scontati»; «è stata allestita da persone in modo volontario». Le argomentazioni fornite rispetto alla scelta dell'aggettivo *coinvolgente* convergono tutte verso una stessa direzione, per cui entrambe le categorie di utenti affermano che la visita è stata coinvolgente «poiché è bello potersi immergere nel mondo scolastico di un'altra epoca». Vanno verso la stessa direzione anche le spiegazioni date per la scelta del terzo aggettivo della classifica, infatti, se per un verso gli studenti della scuola secondaria superiore dicono che la visita è stata *utile* perché «tratta argomenti del programma di storia della V superiore» e «perché ha ampliato le mie conoscenze riguardo l'epoca fascista, mettendo bene in luce le differenze tra scuola fascista e moderna»; dall'altro, gli studenti universitari sostengono che la visita è stata utile «per integrare le conoscenze già possedute sul periodo»; «in quanto ha contribuito a focalizzare alcuni argomenti affrontati a lezione e ciò ha permesso di arricchire il nostro percorso formativo». Subito di seguito a questa triade di aggettivi appena commentati, nell'ordine di preferenza espressa da entrambe le tipologie di studenti, troviamo gli aggettivi *emozionante* e *istruttiva*. La gamma di aggettivi individuata dagli studenti è molto vasta, oltre a quelli appena richiamati, infatti, abbiamo 22 diversi aggettivi scelti dagli studenti della secondaria superiore e ben 84 indicati dagli studenti universitari. La maggior parte degli aggettivi indicati dai primi, per l'esattezza 20 su 22, li ritroviamo tra quelli proposti dai secondi, ma l'elemento sul quale è interessante appuntare l'attenzione consiste, più che sulle singole parole scelte, sulle principali macrocategorie alle quali queste possono essere ascritte. Degli 86 diversi aggettivi indicati dai soggetti che hanno svolto il questionario, 43 possono essere ricondotti alla dimensione cognitiva e 42 alla dimensione emozionale³⁰. Queste due dimensioni, a nostro avviso, riflettono le due connotazioni prevalenti utilizzate dagli studenti per descrivere l'esperienza vissuta al Museo e, sebbene l'impatto di tipo cognitivo risulta prevalente rispetto a quello di natura emotiva, per cui abbiamo il 72%

³⁰ Alla *dimensione cognitiva* possono essere ricondotti gli aggettivi che si elencano di seguito in ordine di preferenza: Educativa, Stimolante, Costruttiva, Chiara, Ricca, Ben organizzata, Curata, Formativa, Significativa, Riflessiva (motivo di riflessione), Breve, Esaustiva, Innovativa, Importante, Originale, Dettagliata, Illuminante, Realistica, Chiarificativa, Completa, Diversa, Particolare, Storica, Esempiare, Esplicativa, Organizzata, Particolareggiata, Dettagliata Pertinente/ Inerente (con il percorso di studi), Pratica, Soddisfacente, Accurata, Ampia nei contenuti, Approfondita Attuale, Coerente, Concreta, Consigliabile, Interattiva, Ordinata, Studiata, Variegata, Iniziativa, Piccola. Come appartenenti alla *dimensione emozionale*, invece, possiamo elencare, sempre in ordine di preferenza, i seguenti aggettivi: Bella, Piacevole, Curiosa, Suggestiva, Divertente, Motivante, Affascinante, Sorprendente, Accogliente, Efficace, Entusiasmante, Positiva, Appagante, Evocativa, Intensa, Rievocativa, Accattivante, Convincente, Appassionante, Arricchente, Attraente, Commovente, Elettrizzante, Familiare, Gradevole, Immediata, Impegnativa, Inaspettata, Inquietante, Insolita, Partecipativa, Patriottica, Reale, Scolastica, Semplice, Speciale, Tenera, Toccante, Tranquilla, Triste, Unica, Viva.

delle preferenze per il primo di contro al 47% del secondo, la natura delle risposte date dagli studenti per supportare le scelte fatte, rivela uno stretto connubio tra le due dimensioni, tale che l'una sembra essere il completamento dell'altra.

Tab. 3. Domanda n. 1: tre aggettivi per descrivere la visita

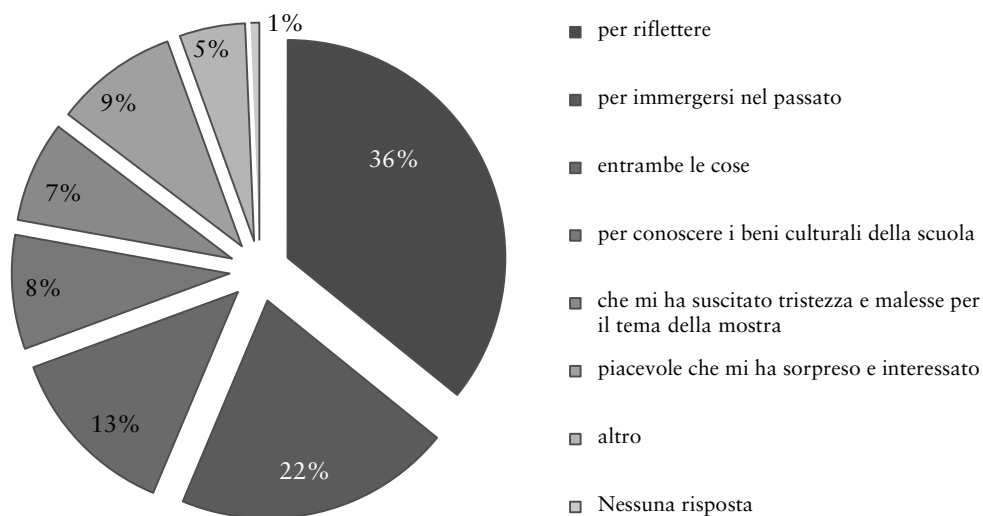


Questo quadro ci viene confermato dall'analisi delle risposte date alla seconda domanda, la quale – lo ricordiamo – invitava gli utenti a descrivere brevemente le sensazioni, le emozioni e le riflessioni suscitate dall'esperienza condotta presso il Museo. Tale domanda, come è chiaro, è stata predisposta proprio allo scopo di stimolare l'utente ad indagare con maggiore profondità le impressioni e le considerazioni espresse in modo immediato all'inizio del questionario per tramite dell'associazione ad aggettivi. Le risposte, infatti, ci mostrano un panorama preciso, che consente di individuare tre principali modi con i quali è stata interpretata e vissuta l'esperienza al Museo. Per il 36% degli studenti è stata un'occasione di riflessione sulla storia della scuola del proprio Paese, o meglio «un bel modo per comprendere meglio quello che studiamo e rendere la storia più interessante», per essere «più consapevoli del cambiamento avvenuto in ambito scolastico nel corso del tempo» e per «toccare con mano un periodo (quello del ventennio fascista) che sembra a noi così lontano». Il 21% degli studenti riferisce che ha provato emozioni molto forti, tanto da sentirsi immerso nella vita scolastica del passato, per cui ricorrono immagini come quella del «tuffo nel passato» e affermazioni del tipo «ho avuto la sensazione di trovarmi all'interno di una classe di una scuola del periodo fascista», oppure «mi sono immaginata piccola nei primi banchi, impegnata a seguire il maestro» o, ancora, «entrare nel museo ha fatto emergere in me pensieri legati al racconto

dei miei nonni e alle persone anziane che vivono nel mio paese». Per il 13% delle persone il percorso di visita al Museo della scuola è stata un'occasione di immersione nel mondo della scuola del passato e, nel contempo, di comprensione delle differenze tra presente e passato, per cui molti riportano considerazione del tipo: «la visita a questo museo mi ha fatto assaporare un'epoca che non ho vissuto (quella del fascismo), della quale possedevo un'idea cristallizzata. Vedere da vicino oggetti appartenuti a quel periodo mi ha permesso di sentire quell'epoca non più così cristallizzata» oppure «mi sono sentita catapultata nel mondo scolastico del fascismo, è stato come tornare indietro di decenni per comprendere che effettivamente non è così lontana da noi questa realtà scolastica». Per una percentuale minoritaria del campione testato, che si colloca appena sotto all'8%, appare prevalente l'impatto avuto dalla presa di coscienza del valore simbolico e storico degli oggetti che appartengono all'esperienza scolastica dei loro avi e che, per un verso, ridestano in loro l'eco di ricordi e memorie intergenerazionali e che, per un altro, riconoscono come componenti della loro vissuto scolastico passato e presente, al punto da arrivare ad esclamare: «Chissà cosa ci passa per la mente quando ci raccontano cos'era la scuola a quei tempi e invece, è esattamente come lo era per noi, come lo è tutt'ora vedere quei piccoli banchi di scuola, quei quaderni scritti davvero da bambini, quelle penne davvero utilizzate da qualcuno, suscitano strane sensazioni di meraviglia. Le stesse materie scolastiche magari studiate in modo differente, le cartine geografiche diverse da quelle di oggi, gli zaini! Un modo divertente ed efficace di rivivere la storia» e, potremmo aggiungere noi, di comprendere l'importanza di un patrimonio fatto di oggetti apparentemente banali e di scarso valore, spesso dimenticati e bistrattati, che pure sono parte viva del nostro vissuto e di quello di chi ci ha preceduto e che, anche per questo, se invitati a riflettere un attimo, riconosciamo come elementi fondanti di un'identità individuale e collettiva da preservare sì, ma di cui è soprattutto necessario riappropriarsi, promuovendo processi di «recreación colectiva»³¹.

³¹ L'espressione è tratta da un recente e denso saggio di Cristina Yanes e Miguel Somoza Rodríguez, nel quale i due studiosi, alla luce dei principi della *nouvelle muséologie* e della *critical museology*, mettono in luce le specificità dei musei della scuola e dell'educazione come «strumento de desarrollo social y cultural al servicio de una sociedad democrática». C. Yanes Cabrera, J.M. Somoza Rodríguez, *Museos escolares: el patrimonio material e inmaterial de la educación como conciencia crítica*, in A. Mayordomo Pérez, M. del Carmen Agulló Díaz, G. Garcia Frasset (edd.), *El patrimoni historicoeducatiu valencià. V Jornades d'Història de l'Educació Valenciana, Gandia, 30 i 31 d'octubre de 2009*, Universitat de València, Departamento de Educación Comparada e Historia de la Educación, Centre de Estudis i Investigacions Comarcals Alfons el Vell, 2011, pp. 108-113 e per le citazioni pp. 108, 111.

Tab. 4. Domanda n. 2: la visita è stata un'esperienza...

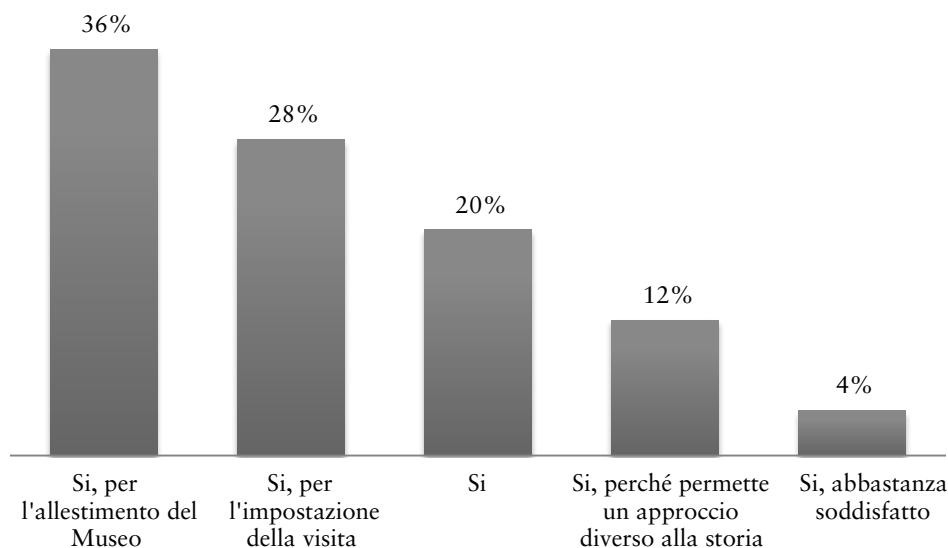


Dell'aspetto appena sottolineato troviamo conferma nell'analisi delle risposte date alla terza domanda, che si proponeva di misurare il gradimento degli utenti rispetto all'impostazione data alla visita. Tolto un 20% circa di risposte molto generiche nelle quali lo studente si dichiara soddisfatto senza entrare nel merito delle ragioni, non sorprende notare che, oltre al 28% degli studenti che ritiene efficace l'impostazione data alla visita, vi sia un gruppo significativo di studenti, pari al 36% del campione analizzato, che riconduce l'efficacia dell'esperienza vissuta principalmente alla struttura narrativa e comunicativa utilizzata per l'allestimento del Museo³², e che viene ben rappresentato dalla risposta formulata da uno studente: «Questo museo è realizzato in modo eccellente. A differenza di altri musei che ho visitato, nei quali non riuscivo a seguire molto il filo logico perché l'ambiente era molto dispersivo, in questo, essendo allestito in una sola stanza non molto grande e grazie ad una disposizione accurata degli oggetti, sono riuscita a seguire molto bene il discorso della professoressa». Ci pare di un certo rilievo anche la posizione espressa dal 12% degli studenti, che giudica positivamente l'esperienza al Museo in quanto ritiene che permette di approcciare in modo diverso dei contenuti di carattere storico spesso percepiti come lontani e astratti, tanto da consentirgli «di scoprire una storia che non fa riferimento al generale, come nell'impostazione scolastica più comune, ma a

³² A questo riguardo, Cristina Yanes ha osservato giustamente come «in pedagogic museums, more than in art museums, the quality of the exhibition is not in the importance of the collection itself, but lies rather in the richness and complexity of the social relations that are expressed through the objects that comprise it». Cfr. Yanes Cabrera, *The museum as a representation space of popular culture*, cit., p. 27.

dei particolari, alle minime sfumature che permettono di scoprire i sentimenti, i pensieri delle stesse persone». Pur nella generale soddisfazione espressa dagli studenti, da alcune risposte emergono alcuni primi indicatori di criticità che trovano l'occasione di essere esplicitati grazie alla domanda numero quattro.

Tab. 5. Domanda n. 3: sei soddisfatto della visita?



In questa domanda il soggetto era incoraggiato a indicare suggerimenti per il miglioramento dell'esperienza vissuta al Museo. Va precisato che circa 1/4 degli studenti ha dichiarato o di non aver alcun suggerimento o che riteneva più che apprezzabile l'impostazione sperimentata; tuttavia, diversi e utili suggerimenti sono venuti da numerosi altri utenti. Rispetto a questi possiamo dire che alcune delle indicazioni emerse sono di facile attuazione, perché si integrano pienamente nella struttura del percorso così come è stata progettata e realizzata e tra questi, ad esempio, ricordiamo che il 9,7% dei soggetti chiede più tempo per la visita e il 5% per l'esplorazione autonoma e il confronto condiviso su ciò che singolarmente ciascun soggetto ha osservato, mentre il 6,8% dei soggetti suggerisce di organizzare visite con gruppi meno numerosi di massimo dieci persone. Altri spunti, invece, suggeriscono degli interventi più complessi per varie ragioni. Il 9,7% dei soggetti sottolinea il desiderio di toccare con mano gli oggetti, i libri, i quaderni esposti nel Museo, tale desiderio, sicuramente legittimo, pone però delle problematiche di tipo conservativo, che tuttavia potrebbero essere superate – ad esempio – dotando il Museo con dispositivi

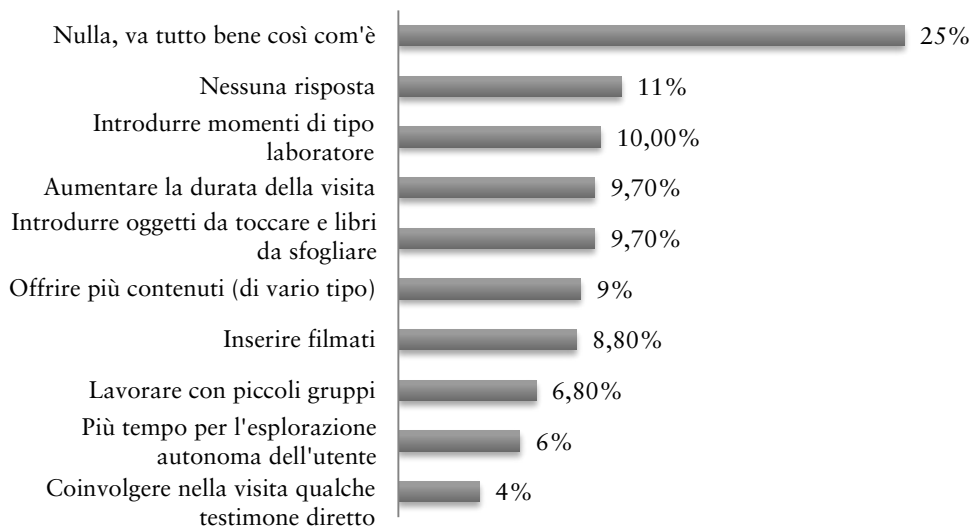
per la consultazione in digitale di alcuni documenti significativi³³. Comune a molti di questi suggerimenti è l'esigenza di ritornare al Museo per svolgere altre attività, anche di tipo laboratoriale (molti, precisamente il 9,7% del campione preso in esame, esprimono il desiderio di sperimentare la scrittura con penna e calamaio), o per ascoltare racconti di testimoni diretti del passato, o per vedere filmati storici da 'rivivere' e discutere in qualche modo nell'ambiente del Museo³⁴. Sullo sfondo di queste suggestioni ci sembra di rilevare l'esigenza di conoscere il Museo attraverso un itinerario formativo articolato in diverse fasi esplorative, che permetta di scoprire di volta in volta le varie facce di una realtà che ai più appare sin da subito come polisemica e poliedrica e, dunque, difficile da cogliere e comprendere nello spazio di un solo incontro³⁵.

³³ Rispetto a questo punto, vale la pena di ricordare che il Museo della scuola «Paolo e Ornella Ricca» è in procinto di mettere a disposizione degli utenti i materiali predisposti per la XV edizione del Festival della letteratura di Mantova, svoltosi nella cittadina lombarda dal 7 all'11 settembre 2011. In questa occasione, ricorrendo il 150° anniversario dell'Unità d'Italia, la kermesse mantovana aveva ospitato alcuni eventi dedicati alla scuola italiana quale agente di costruzione dell'identità nazionale e allestito uno spazio dedicato ai *Quaderni di scuola*, nel quale era possibile sfogliare dei quaderni virtuali. Costituiti da una selezione di componimenti scolastici disposti cronologicamente e per argomenti chiave (nazione, famiglia, lavoro, immaginario e religione), per offrire diversi percorsi di lettura della storia del Paese dall'Unità ad oggi, i quaderni virtuali raccoglievano i tasselli di un grande testo collettivo, frutto di un lavoro di ricerca condotto presso i principali fondi documentari di quaderni scolastici italiani, realizzato nell'ambito del progetto *Quaderni di scuola. Centocinquant'anni di storia italiana letta attraverso i componimenti degli scolari*, coordinato da Juri Meda. Per maggiori informazioni si rimanda all'archivio delle news del sito ufficiale del Festival: <<http://www.festivaletteratura.it/news.php?azione=dettaglio&id=89>> (ultimo accesso: 27 giugno, 2014).

³⁴ Ci piace ricordare, a questo proposito, che in ambito italiano si stanno portando avanti diverse iniziative promosse da gruppi e centri di ricerca universitari. In particolare, segnaliamo il progetto di raccolta e registrazione di interviste ad anziani maestri portato avanti dal Ce.S.I.S. – *Centro per la Storia delle istituzioni scolastiche, del libro per la scuola e la letteratura per l'infanzia* dell'Università degli Studi del Molise, fruibile dagli utenti del *Museo della scuola e dell'educazione popolare* di Campobasso, e il video *Lucciole per lanterne. La scuola elementare durante il fascismo nei ricordi degli allievi*, curato da Mirella D'Ascenzo ed inserito nel percorso *La scuola italiana durante il fascismo*, all'interno della Sala della scuola del MODe – *Museo Officina dell'Educazione* dell'Università degli Studi di Bologna, consultabile al link: <http://archivio.mode.scedu.unibo.it/?page_id=1945> (ultimo accesso: 27 giugno, 2014). Per maggiori informazioni sui due progetti e sulla cornice all'interno della quale sono stati sviluppati si rimanda a: A. Barausse, «*E non c'era mica la bic!*». *Le fonti orali nel settore della ricerca storico scolastica*, in H.A. Cavallera (ed.), *La ricerca storico-educativa oggi. Un confronto di Metodi, Modelli e Programmi di ricerca*, 2 voll., Lecce, Pensa Multimedia, 2013, vol. II, pp. 539-560, in partic. pp. 549-560; M. D'Ascenzo, *Dalla mostra al museo? Ipotesi per un museo della scuola e dell'educazione*, «*Ricerche di Pedagogia e Didattica*», vol. 7, n. 1, 2012, pp. 1-28, in partic. p. 17.

³⁵ Nuovi stimoli per integrare e rinnovare il programma educativo del Museo della scuola «Paolo e Ornella Ricca» si attendono dalla rielaborazione delle esperienze realizzate nell'ambito del primo ciclo di lezioni relative all'insegnamento di *educazione e interpretazione del patrimonio* del corso di laurea magistrale in Progettazione e gestione dei sistemi turistici dell'Università degli Studi di Macerata. Le lezioni, tenute da Marta Brunelli, hanno coinvolto attivamente gli studenti del secondo anno di questo corso di laurea, che hanno avuto modo di acquisire le basi teoriche della *heritage interpretation* di matrice anglosassone e di mettere in pratica le tecniche e i metodi

Tab. 6. Domanda n. 4: suggerimenti per migliorare

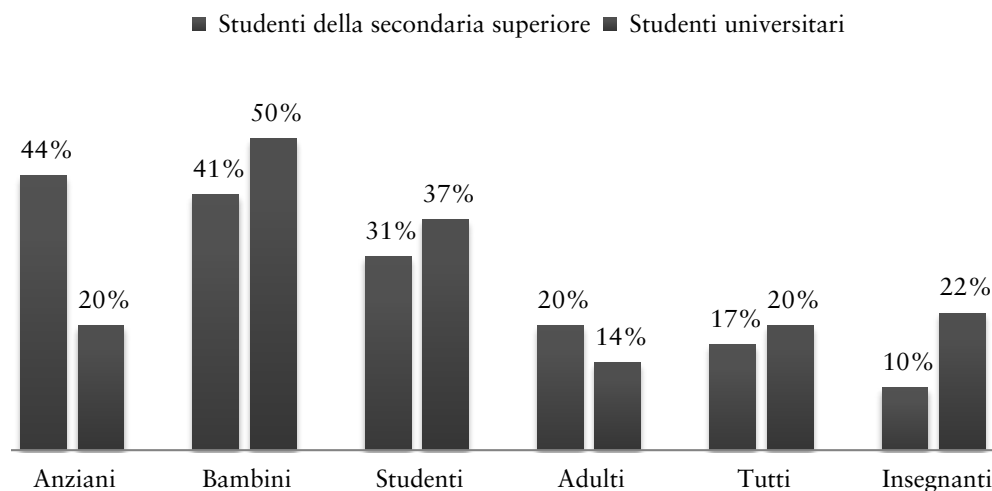


La complessità e ricchezza del Museo della scuola viene ratificata dalle risposte date all'ultima domanda del questionario, nella quale gli studenti erano invitati a considerare le tipologie di utenti che ritenevano più adatte per una visita al Museo. In tale sede, infatti, le risposte si declinano come segue. Per quanto riguarda gli studenti della scuola secondaria superiore il 50% consiglierebbe una visita al Museo della scuola soprattutto ai bambini e alle persone anziane, a questi perché «gli anziani sentono maggiormente la forza della storia e del passato e ai bambini per una conoscenza di ciò che era il mondo che loro frequentano regolarmente»; circa 1/4 degli studenti però ritiene il Museo adatto e utile per i loro coetanei e le persone adulte e, più in generale, dichiara che lo consiglierebbe un po' a tutti. Se prendiamo in esame le risposte date dagli studenti universitari emerge che: il 50% del campione analizzato ritiene il Museo della scuola adatto soprattutto per i bambini, quale occasione «per incrementare in loro la memoria storica»; il 33% pensa che possa rappresentare un'esperienza significativa per tutti gli insegnanti e per coloro che aspirano ad essere insegnanti, per favorire in loro «una presa di coscienza dell'importanza del loro mestiere»; il 37% consiglierebbe di visitare il Museo a tutti gli studenti, «agli universitari in generale, ma in particolare a quelli che frequentano il corso di Scienze della formazione primaria, in quanto

della comunicazione interpretativa e dell'interazione dialogica con il pubblico, proprio presso il Museo della scuola di Macerata. Per un quadro sulle origini e lo sviluppo della giovane quanto dinamica disciplina della *heritage interpretation* si rinvia a M. Brunelli, *Heritage Interpretation. Un nuovo approccio per l'educazione al patrimonio*, Macerata, eum, 2014.

il contenuto del Museo è strettamente correlato al loro piano di studi e alla loro futura professione; ai bambini di V della primaria e delle medie in quanto possono osservare le differenze tra la scuola odierna e quella di un periodo passato»; il 20% considera il Museo della scuola particolarmente indicato per le persone anziane poiché potrebbe essere per loro «un modo di rievocare momenti vissuti o quasi»; infine un altro 20% afferma che consiglierebbe una visita al Museo della scuola «un po' a tutte le categorie d'età, dai grandi ai piccoli, perché è un'esperienza significativa e molto gratificante e non credo che ci siano fasce d'età che non possano partecipare: al grande ritorna il suo periodo, al piccolo permette di pensare alla scuola dei nonni e alle differenze con il periodo che sta vivendo». Questi dati fanno emergere la duttilità subito riconosciuta al Museo della scuola «Paolo e Ornella Ricca» e al patrimonio che esso conserva, confermando l'opportunità, se non anche la necessità, di proseguire lungo il percorso di valorizzazione del potenziale educativo che esso è in grado di esprimere, attraverso attività sempre più mirate e diversificate, che siano in grado di intercettare le molteplici domande formative provenienti non solo dal mondo della scuola e dell'università, ovvero i pubblici che fino a questo momento hanno interessato le attività educative promosse dall'équipe del Museo, ma dalle persone adulte e anziane, così come da pubblici speciali, come insegnanti e famiglie.

Tab. 7. Domanda n. 5: a chi consiglieresti il museo?



Alcuni spunti interessanti in questa direzione emergono dall'analisi dei materiali conservati nel *Fondo didattica museale*, al quale si è fatto cenno sopra. Va detto che il *Fondo*, che accoglie i materiali, per lo più temi, interviste, pensierini e disegni realizzati dai bambini che hanno partecipato ai percorsi didattici e ai laboratori promossi dal Museo della scuola «Paolo e Ornella

Ricca», si presta a molteplici scopi, primo fra tutti quello di documentare la storia delle attività formative del Museo. Il *Fondo* raccoglie testimonianze che non sono state prodotte sotto la guida del personale del Museo, ma che sono nate all'interno di un altro contesto educativo, vale a dire la scuola, e per questa loro natura non possono essere utilizzate come indicatori diretti dell'efficacia o meno delle attività svolte al Museo, ma possono certamente offrire utili *indicatori indiretti* per consolidare o ripensare l'impianto e la struttura dei percorsi attivati.

Il campione di documenti conservati nel Fondo è significativo e consente di fare diverse considerazioni e paralleli, in quanto è costituito dagli elaborati prodotti da una classe quarta, tre classi terze, una classe seconda e da tre classi prime della scuola primaria che hanno partecipato al percorso didattico *La scuola dei nonni* e al laboratorio *Zampe di gallina* e dagli elaborati realizzati da tre classi prime della scuola secondaria inferiore che hanno svolto presso il Museo la visita guidata e il laboratorio *Dentro l'«aula oscura»*. Ci soffermeremo, a titolo esemplificativo, sui materiali prodotti dalle classi terze della scuola primaria. Si tratta di tre classi provenienti da istituti scolastici diversi, anche se tutti e tre di Macerata, che hanno effettuato l'esperienza presso il Museo della scuola in tre anni diversi: 13 dicembre 2012, 5 marzo 2013 e 4 febbraio 2014. Subito dopo l'esperienza presso il Museo gli insegnanti di tutte e tre le classi hanno chiesto ai loro alunni di svolgere un tema intitolato *La visita al Museo*, che nel caso di una classe è stato anche accompagnato da disegni. Siamo davanti, pertanto, alla stessa tipologia di attività richiesta agli alunni di tutte e tre le classi, fatto che rende l'analisi interna degli elaborati ancora più interessante.

Disponiamo in tutto di 51 componimenti, di cui 12 per la prima classe in visita, 17 per la seconda e 22 per l'ultima; abbiamo provato ad 'interrogarli' leggendoli attraverso quattro domande: *Che cosa sei andato a vedere? Che cosa hai capito? Che cosa hai fatto? Che cosa pensi di questa esperienza al Museo?* Nel caso di due classi il livello di rielaborazione dell'esperienza è molto alto, in quanto i bambini mostrano di aver ben chiara la particolarità del Museo che hanno visitato e di avere piena consapevolezza della distanza storica esistente tra la loro scuola e quella vista al Museo e narrata dai nonni testimoni. I bambini, inoltre, ricordano tutti i passaggi principali della loro esperienza al Museo e descrivono in modo appropriato le differenze esistenti tra la scuola di oggi e quella del passato, rispetto alla struttura della classe, al corredo scolastico degli alunni e alle pratiche d'insegnamento e di punizione in uso nella scuola dei nonni.

Nel caso di una classe, invece, i bambini si soffermano solo sulla dimensione ludica dell'esperienza vissuta al Museo e, in particolare, si concentrano sulle attività svolte in prima persona: scrivere con il pennino, fare la foto con il cappello d'asino, provare ad inginocchiarsi sui ceci. Su 22 bambini, 11 dicono di «essere andati a vedere le classi come erano tanto tempo fa», mentre gli altri 11 non menzionano neanche il Museo e dicono di aver fatto una gita scolastica



Fig. 5. Disegno realizzato da un bambino della classe terza della scuola primaria (4 febbraio 2014).

molto divertente. I concetti che sembrano essere passati di più sono quelli legati alle punizioni tipiche della scuola di un tempo, mentre degli aspetti relativi alla struttura della classe, dei banchi, alle caratteristiche del corredo scolastico presentati dalla guida e poi spiegati dai nonni, che pure hanno intervistato loro stessi, sembra essere rimasto ben poco. Un'impressione, questa, che appare confermata dai disegni che accompagnano gli elaborati di questa classe, nei quali i bambini scelgono prevalentemente di rappresentarsi mentre scrivono con il pennino e indossano il cappello d'asino.

Come si è già sottolineato, risulta difficile valutare prodotti realizzati in altri contesti, ma ci sembra legittimo ipotizzare che l'incisività o meno di un'esperienza di percorso didattico e/o laboratorio svolta presso il Museo dipenda in buona misura, oltre che dalla preparazione dei soggetti che guidano e coordinano il momento dell'attuazione dell'esperienza (in questo caso il personale del Museo e i nonni testimoni), dal lavoro previo svolto dall'insegnante in classe con gli alunni. Tale ipotesi trova un valido riscontro nel fatto che per le due classi terze che mostrano di aver acquisito una maggior consapevolezza del percorso didattico svolto al Museo notiamo che: in un caso, i bambini di una classe nei temi riferiscono che l'esperienza del Museo è stata preceduta da un momento di riflessione a scuola, nel corso del quale hanno ascoltato i racconti di alcune nonne che sono andate nella loro classe a raccontargli come era la scuola di un tempo; e nell'altro, l'insegnante che ha accompagnato i bambini al Museo dichiara che: «all'interno della programmazione didattica di storia abbiamo

confrontato il quadro di civiltà attuale con quello dei nonni. La scuola è stata uno di questi aspetti» e aggiunge che il percorso didattico svolto presso il Museo è stato «molto motivante e coinvolgente perché i bambini hanno potuto relazionarsi con un ‘nonno testimone’ del tempo ed osservare concretamente quello che avevano studiato nel libro».

Molte altre potrebbero essere le considerazioni da fare anche sulla tipologia di lavoro da svolgere in classe dopo una prima esperienza al Museo, così come sugli aspetti da migliorare, integrare o cambiare nella fase di attuazione di questo percorso didattico, ma la questione che ci preme sottolineare in questa sede, anche alla luce dei casi e dei dati presentati, è che una visita, un percorso didattico o un laboratorio inseriti nel programma didattico di una classe della scuola primaria o di un corso di laurea universitario, risultano inevitabilmente più efficaci rispetto a un’attività che non ha queste caratteristiche. Ciò comporta la necessità, da parte dell’équipe del Museo della scuola, di investire più energie sul piano del confronto con il corpo docente per preparare l’ingresso della classe al Museo. Questo indirizzo, se nel breve periodo richiede un maggior investimento di tempo e risorse umane, nel medio-lungo periodo consente certamente di rafforzare e consolidare i rapporti tra il Museo e gli istituti scolastici del territorio perché produce fenomeni di fidelizzazione e di continuità. La collaborazione tra personale docente e personale del Museo della scuola, prima e dopo la realizzazione di un’attività didattica, dunque, può rappresentare quel valore aggiunto che fa la differenza nell’innalzamento della qualità e dell’efficacia di un’esperienza formativa che voglia porre realmente al centro la conoscenza del patrimonio storico-educativo e che non si limiti all’episodica e superficiale suggestione emotiva e/o ludica, ma che punti a lasciare tracce profonde nella memoria delle persone e che rappresenti una chiave di accesso per sviluppare in loro una consapevolezza critica nei riguardi del passato³⁶.

Conclusioni

Dalle esperienze fin qui analizzate e descritte appare chiaro che il Museo della scuola «Paolo e Ornella Ricca» sia deciso ad assolvere ai suoi compiti formativi, aprendosi sempre di più verso le istituzioni scolastiche del territorio e la cittadinanza nel suo complesso, al fine di evitare i rischi di un uso depotenziato di un’istituzione culturale che, proprio in virtù della natura peculiare del patrimonio che conserva, si presta a far emergere delle domande inespresse e a dare delle risposte condivise. In sostanza i musei della scuola e dell’educazione possono costituire un’autentica ‘palestra di cittadinanza attiva’ per le nuove e vecchie generazioni, favorendo occasioni di conoscenza reciproca, dialogo

³⁶ Cfr. Somoza Rodríguez, *Museología de la educación*, cit., pp. 141-166.

e confronto, capaci di stimolare il pensiero critico e l'approccio complesso al proprio presente attraverso la riappropriazione consapevole della memoria individuale e collettiva.

Si tratta, certo, di una missione non facile specie se a gestirla sono degli storici dell'educazione, che provengono prevalentemente dalla ricerca cosiddetta pura. Perché questa precisazione? Possiamo dire, a tale proposito, che la rivoluzione copernicana che si è realizzata in particolar modo in Spagna nell'ultimo decennio, in Italia non c'è stata. Non si è prodotto cioè quel fenomeno di circolarità virtuosa tra due ambiti tradizionalmente divaricati: ricerca e didattica che, come ha osservato Pedro Moreno Martínez, in Spagna si sono incontrati grazie a «la proyección que el reseñado impulso experimentado por el estudio de las diferentes vertientes del patrimonio histórico educativo»³⁷. Nel contesto italiano, infatti, tale divaricazione rimane ancora prevalente negli *habitus* mentali e nelle consuetudini accademiche del settore storico-educativo, a tal punto che le attività e i prodotti legati alla sfera della conservazione e dell'educazione al patrimonio storico-educativo non sono percepiti e valutati come propri della missione dello storico dell'educazione, che conserva ancora una connotazione fondata in via preferenziale sulla ricerca in archivio e in biblioteca, sullo scavo delle fonti, abbinato a una rigorosa interpretazione delle stesse condotta sulla base delle metodologie e della letteratura specialistica più accreditate. A nostro avviso, oltre a questo filone di studio e di ricerca, che rimane lo 'zoccolo duro' della nostra missione, è necessario lasciarsi provocare dalle nuove istanze avanzate dalla contemporanea società della conoscenza, che esprime una nuova domanda culturale e formativa, la quale può trovare delle risposte profonde ed efficaci proprio nel patrimonio storico-educativo. Le fonti materiali e immateriali della scuola non possono più essere, nel contesto attuale, solo degli strumenti di ricerca, appannaggio esclusivo di una comunità ristretta di addetti ai lavori, ma chiedono di essere preservate, svelate e messe a disposizione della collettività in tutte le sue componenti, perché – come dichiarato da uno degli studenti coinvolti nelle attività del Museo della scuola «Paolo e Ornella Ricca» – permettono di rivivere e conoscere «un'esperienza universale che si radica nei vissuti profondi di tutti gli individui (delle società alfabetizzate) e di tutte le generazioni».

Con riferimento specifico al contesto italiano, a nostro avviso, gli storici dell'educazione che intendano realizzare tale obiettivo dovrebbero mettersi in rete con altre professionalità; certamente, come si è detto sopra, con gli insegnanti delle scuole di ogni ordine e grado, ma anche con educatori e pedagogisti, così come con esperti di didattica del patrimonio e di museologia,

³⁷ P.L. Moreno Martínez, *La Historia de la Educación como disciplina y campo de investigación: renovación historiográfica, patrimonio y educación*, in R. Berruezo Albéniz, *El largo hacia una educación inclusiva. Aportaciones desde la historia de la educación*, Pamplona, Universidad Pública de Navarra, 2009, pp. 141-151 (p. 149 per la citazione).

per veicolare nei modi e nelle forme più appropriate le conoscenze storiche frutto delle loro ricerche e per consentire agli oggetti, ai libri, ai quaderni e alle voci che ‘abitano’ i musei della scuola e dell’educazione di prendere vita all’interno di contesti educativi adeguatamente predisposti per i vari pubblici. Il «potere fantasmatico»³⁸ delle fonti materiali e immateriali della scuola è un capitale che va gestito a più livelli, per consentire realmente quel passaggio dalla mostra al museo, che non attiene solo alla conquista di spazi espositivi stabili e all’allestimento filologicamente corretto degli stessi, ma che implica la promozione di una serie di azioni progettuali da gestite con l’apporto di diverse competenze, che possano accompagnare e sostenere il naturale e necessario cammino di affermazione di un museo della scuola e dell’educazione come luogo di apprendimento attivo per la cittadinanza. In questo percorso, riteniamo che la conoscenza storica fondata scientificamente rappresenti il punto di partenza imprescindibile per ciascun museo della scuola e dell’educazione, e che nel contempo costituisca quell’ingrediente fondamentale che consente di fare la differenza e di rifuggire dalle inutili ancorché dannose riproposizioni oleografiche o celebrative della storia della scuola passata; tuttavia questi prerequisiti indispensabili, come abbiamo cercato di dimostrare, da soli non sono sufficienti, se davvero i musei della scuola e dell’educazione intendono accettare la sfida e la missione di andare oltre la conservazione, la ricostruzione e l’emozione per divenire spazi riflessivi «de concienciación comunitaria»³⁹.

³⁸ Cfr. D’Ascenzo, *Dalla mostra al museo?*, cit., p. 5.

³⁹ A tal proposito, consideriamo particolarmente efficaci le riflessioni proposte in Yanes Cabrera, Somoza Rodríguez, *Museos escolares*, cit., pp. 113-115.

Editoria e storia dell'arte: il contributo di Giuseppe Mayländer e della casa editrice Apollo

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Publishing and History of Art: the contribution of Giuseppe Maylander and of the Apollo publishing house

ABSTRACT: This paper is about the history of Maylander publisher. Its first part deals with the important of Maylander' presence in Trieste: the intelligentsia of the town used to meet in his bookshop. His antiquarian bookshop, later sold to poet Umberto Saba, was frequented even by James Joyce. The survey underlines Maylander's role in the publishing field through his publications on the history of Trieste and Istria, as well as with the journal «Il Palvese», whose contributors were the youngest and most brilliant intellectuals in town. The second part of the paper deals with Maylander's removal to Bologna in the 1930s, where he was to find the right environment to carry on with his business in a new publishing house Apollo. The survey investigates the latter's short history especially as far as the two following topics are concerned: one the one, co-editions and cooperation with Kurt Wolff's Pantheon Publishing; on the other hand, how it published many works by Adolfo Venturi and his school, thus greatly helping the development of history of Italian art.

EET/TEE KEYWORDS: Publishing Industry; History of Art; Italy; XX Century.

Nella quarta *Lettera triestina*, pubblicata su «La Voce» del 25 marzo 1909, Scipio Slataper dedicava una particolare attenzione alla situazione non facile dell'editoria triestina, ma, seguendo il sottotitolo dell'articolo *La vita dello spirito*, anziché analizzare la storia e la produzione delle case editrici, preferiva volare alto e affrontare le cause e i limiti di un contesto cittadino che non aveva aiutato a fiorire e irrobustire i semi lanciati:

E questo affettuoso di curiosità verso il quasi nuovo l'abbiamo pure per il libro regnicolo anche se niente di nuovo ci insegna. Trieste di sé non si fida: le edizioni fiorentine le danno

come un'impressione di rigatteria provinciale; anche se i giornali e i clienti – qualche volta la sfera di un sol concetto li racchiude – suonano a gloria le campane. Non è vero, la nostra collocazione dei classici italiani (fatta dalla tipografia del Lloyd) è migliore di molte altre d'oltre Iudri, e una decina di libri stampati a Trieste valgono molto di più di molti triestini editi in Italia. Ma il pregiudizio di disistima è un fatto riassuntivo. Non c'è un ambiente colto che imponga la fiducia agli annusatori di copertine. Mancano le teste a formarlo¹.

Era un giudizio che avrebbe pesato se poi quella frase, «Trieste non ha tradizioni di cultura», scritta tuttavia da Slataper in anni e in un contesto ben preciso, sarebbe rimasta proverbiale sino ad essere contestata, discussa, accettata, ma sempre presente, nelle discussioni successive.

Non a caso più che ai meriti o demeriti delle singole imprese editoriali e tipografiche gli intellettuali triestini, anche negli anni successivi, avrebbero rivolto la propria attenzione ai problemi ricorrenti e strutturali per cui anche se c'erano gli uomini e si formavano «di tempo in tempo gruppi ben affiatati di amici, l'ambiente di cultura non nasce». Era un tasto delicato e doloroso anche per Giani Stuparich che in *Trieste nei miei ricordi* sottolineava come vi fosse «qualche cosa in questa mia città, che si frappone a ogni iniziativa rivolta a darle un carattere e una fisionomia culturali; e non solo nell'ambiente disintegratore, ma negli individui stessi, i quali volentieri si isolano o emigrano»². Una vicenda riassunta, per Stuparich, nel percorso seguito da Bobi Bazlen³ che, dal canto suo, nella *Intervista su Trieste*, poi inserita da Roberto Calasso nella raccolta *Scritti*⁴, negava potere essere la sua città «un crogiolo», una fusione di elementi diversi ma poi ben amalgamati, rimanendo invece riscontrabili in questo incontro le singole e disparate esperienze⁵.

¹ Il pezzo di Slataper è riportato anche in M. L. Cammarata, *Editoria triestina del '900*, «Atti e memorie della Società istriana di archeologia e storia patria», vol. XLIII, n.s. XLI, 1993, p. 255. Il lavoro della Cammarata è utile per l'elenco finale e le notizie sugli editori triestini del Novecento, mentre sulla parte storica anziché avviare un'indagine ampia e minuziosa si limita a rintracciare citazioni e accenni in opere specialistiche e letterarie.

² G. Stuparich, *Trieste nei miei ricordi*, Milano, Garzanti, 1948, p. 18.

³ «Nelle altre città, come a Milano o a Firenze o a Roma, un Bobi avrebbe creato intorno a sé un ambiente di cultura, la vita di una casa editrice, una rivista d'ampio orizzonte. Ma a Trieste le cose vanno diversamente», in Stuparich, *Trieste nei miei ricordi*, cit., p. 18. Maria Linda Cammarata nell'articolo *Editoria triestina del '900*, cit., commentava questa frase con la nota 6, p. 260, «Balzen tuttavia fu uno dei fondatori della casa editrice Adelphi, a Milano, agli inizi degli anni Sessanta», che forse vorrebbe confutare o precisare quanto scritto da Stuparich e invece finisce per avvalorare le sue parole.

⁴ R. Bazlen, *Intervista su Trieste*, in Id., *Scritti. Il capitano di lungo corso – Note senza testo – Lettere editoriali – Lettere a Montale*, a cura di Roberto Calasso, Milano, Adelphi, 1970, pp. 242-255.

⁵ Scriveva Balzen: «A occhio e croce, direi che Trieste è stata tutto meno un crogiolo: il crogiolo è quell'arnese nel quale metti dentro tutti gli elementi più disparati, li fondi, e quello che salta fuori è una fusione, omogenea, con una distribuzione eguale di tutte le componenti, e con caratteristiche costanti – ora, a Trieste, che io sappia, un tipo fuso non s'è mai prodotto, o un tipo con caratteristiche costanti... Ciò che saltava fuori da questi tentativi erano delle approssimazioni, figure mai completamente definite... Gente con premesse diverse, che deve tentare di conciliare gli

Le peculiarità della cultura triestina ritornano con forza anche nei pochi interventi che in anni più recenti, a partire dal secondo dopoguerra, hanno tentato, se non una più ampia ricostruzione delle vicende editoriali e tipografiche di Trieste, di focalizzare i motivi ricorrenti di uno sviluppo mancato⁶.

Dalla penalizzante posizione geografica alla diaspora dei suoi intellettuali migliori, dalla insufficienza della attrezzatura tipografica che impediva «un gettito continuo sul mercato nazionale» alla produzione quasi esclusivamente commerciale⁷, Trieste rimaneva «una città che si muove al rallentatore». Una città, era scritto in un'oramai datata panoramica degli anni Sessanta⁸, nella quale prevaleva il pessimismo tanto che «parlare di prospettiva editoriale restava un nonsense, come è problematico o scarsamente utili parlare di un suo futuro letterario o politico».

Il rinnovamento degli studi sulla storia dell'editoria italiana, avviato dalla metà degli anni Ottanta del Novecento e sempre più ampliandosi, consente tuttavia di affrontare ora su basi più mature e più solide la ricostruzione di quelle vicende. In questa prospettiva non si tratta tanto di sconfessare le precedenti testimonianze, che possono tornare utili se lasciate sullo sfondo come documentazione evidenziando gli spunti ancora validi contenuti nei ricordi

inconciliabili, che naturalmente non ci riesce, e saltan fuori tipi strani, avventurieri della cultura e della vita, con tutti i fallimenti più strani e più tormentati che derivano da una tale impostazione», in Bazlen, *Scritti. Note senza testo*, cit., p. 251. Questa citazione, utilizzata da Maria Linda Cammarata per avvalorare il suo discorso sui limiti ambientali dell'editoria triestina, va tuttavia collocata e letta nell'intero contesto dell'articolo. Se infatti, era vero, secondo Bazlen, che data questa mancanza di omogeneità «creare un'opera omogenea sarebbe stato impossibile», poiché «come non esiste un unico tipo triestino, non esiste nemmeno una cultura creativa triestina» e la città per queste ragioni era rimasta «un'ottima cassa di risonanza» senza riuscire a portare un «elemento nuovo nella cultura europea», lo stesso Bazlen sottolineava come proprio l'essere «cassa armonica» consentiva a Trieste di possedere «una sismograficità non comune». Bazlen invitava ad andare con i ricordi a quelle «biblioteche finite sulle bancarelle dei librai del ghetto», dopo la prima guerra mondiale, dove il giovane lettore aveva scoperto «tutta una grande cultura non ufficiale, libri veramente importanti e sconosciutissimi». Nelle «biblioteche dei tedeschi, degli ufficiali di marina austriaci» Bazlen acquistava «roba che non aveva mai inteso nominare», libri «polverosi e pronti a essere dispersi», capaci tuttavia di riemergere ed essere «rivalutati in questi ultimi venti o trent'anni». Una città da non rinchiudere in un giudizio diminutivo per quanto riguardava la cultura sia libraria (quel ponte verso la cultura internazionale conviveva con una certa retorica italiana che avrebbe potuto sfasciare «le bancarelle sotto il peso di Carducci, Pascoli, D'Annunzio e Sem Benelli, con contorno di Zambini e di altra gente che portava male», sia musicale. «Città musicale» era diventata Trieste «dove tutti cantavano, e bene, con canzonette con una loro cadenza tipica, riconoscibile e occhio nudo, dove nascevano canzoni quasi popolari, con un Teatro Comunale dove il successo di un'opera o di un cantante aveva, nell'Ottocento, un valore poco inferiore a un successo della Scala», in Bazlen, *Scritti*, cit., pp. 254-255.

⁶ Per un'analisi di questi interventi cfr. Cammarata, *Editoria triestina del '900*, cit., pp. 260-277.

⁷ V. Lisiani, *Anche a Trieste crisi editoriale*, in *Catalogo della Fiera del libro*, a cura dell'Associazione Stampa Giuliana, Trieste, Del Piero, 1948, pp. 140-142.

⁸ F. Foelkel, *Venezia Giulia*, in M. Bonetti (ed.), *Storia dell'editoria italiana*, Roma, Gazzetta del libro, 1960, pp. 185-197.

autobiografici. Saranno queste pagine a guidare lo studioso nel suo tentativo di dare colore e memoria a persone e avvenimenti polverosi e sbiaditi. Piuttosto si trattava di compiere un passo avanti ricostruendo la produzione libraria di tipografie e case editrici, la composizione operaia e le lotte sindacali, l'editoria scolastica e universitaria, l'influenza delle diverse correnti letterarie e linguistiche che hanno attraversato la regione, l'originalità di una cultura locale chiamata al difficile compito di sopravvivere e dialogare con pratiche e conoscenze diverse. Senza dimenticare autori e testi legati a quell'attività commerciale e scientifica così a lungo presente in una città portuale come Trieste. Continuare a insistere sui limiti di un'editoria povera di quattrini e di idee, come d'altronde guardare alla diaspora degli intellettuali triestini incapaci di resistere alle sirene editoriali più agguerrite e convincenti di altre città – condizione peraltro comune a tanti luoghi periferici se solo si pensa al richiamo esercitato da Fiume, da Milano e, in misura ben maggiore, da Parigi, Londra, Vienna, Berlino, New York – equivarrebbe poi a non approfittare dei nuovi e importanti strumenti di lavoro. Sia la pubblicazione di *CLIO*, da usare con le cautele più volte sottolineate, che la comparsa recente dei due repertori *Editori italiani dell'Ottocento* e *TESEO*, quest'ultimo dedicato all'editoria scolastica, possono contribuire in modo determinante ad offrire una valida bussola per la nuova generazione di studiosi dell'editoria triestina⁹. Se non si possono enumerare aziende di portata nazionale e di lunga durata e se non nascevano editori del calibro di Gaspero Barbèra, Emilio Treves, Giuseppe Pomba, Nicola Zanichelli, Enrico Bemporad, le tipografie e le case editrici triestine offrono uno specchio interessante della particolare storia culturale della città. Pensiamo a quelle aziende che si inserivano nell'importante e redditizio comparto dello scolastico tenendo vivo il legame con la comunità austriaca e slovena o a quelle tipografie che davano spazio a una produzione letteraria e di storia locale spesso non di alto livello ma ancora oggi importante per comprendere la lenta e faticosa evoluzione degli studi in questo campo. Iniziative portate avanti da uomini che comunque avevano trovato a Trieste un ambiente adatto per la loro intraprendenza e volontà di mettersi alla prova: da Giacomo Chiopris a Hermanstorfer, da Ignazio Papsch a Weis, da Viktor Dolec a Ettore Vram. Senza dimenticare le piccole case editrici Knjigarna Jaka Štoka, che si farà conoscere per la pubblicazione di grammatiche, guide linguistiche, dizionari della lingua slovena, ma anche per raccolte di poesie, contributi di argomento storico, diffusione di periodici e almanacchi, e Tiskarna Edinost, anch'essa impegnata nella tutela degli interessi della popolazione slovena e nella promozione di organizzazioni economiche e

⁹ *Editori italiani dell'Ottocento. Repertorio*, a cura di A. Gigli Marchetti, M. Infelise, L. Mascilli Migliorini, M.J. Palazzolo, G. Turi, in collaborazione con la Fondazione Arnoldo e Alberto Mondadori, coordinamento redazionale di Patrizia Landi, 2 voll., Milano, Franco Angeli, 2004; *TESEO. Tipografi e editori scolastico-educativi dell'Ottocento*, diretto da G. Chiosso, Milano, Editrice Bibliografica, 2003; *TESEO '900. Editori scolastico-educativi del primo Novecento*, diretto da G. Chiosso, Milano, Editrice Bibliografica, 2008.

culturali. I filoni editoriali non si fermavano alla stampa del giornale «Edinost», e del suo supplemento «Slovenec», ma si espandevano sia alla letteratura e cultura popolare, anche con la pubblicazione dei libri di letteratura russa in traduzione slovena, sia all'interesse verso lo scolastico con l'avvio di collane e manuali destinati all'istruzione elementare¹⁰. Né vanno dimenticate le imprese dello sloveno Viktor Dolec¹¹ e dei Padri Mechitaristi che opereranno a Trieste sino al 1810 quando decisero, all'arrivo dei francesi, di spostare la propria attività a Vienna, pagando in questo modo la loro fedeltà agli austriaci. O ancora quei tipografi, librai, editori come Colombo Coen capaci di dare voce e attenzione alla presenza di una comunità ebraica numerosa e colta¹². Liberatasi finalmente della sudditanza veneziana e assunta a città commerciale e dinamica era dall'Ottocento che Trieste poteva proporsi come ponte tra culture e come postazione di confine. È quindi soprattutto da questo secolo che gli studi sull'editoria triestina devono ripartire. Incominciando a colmare la colpevole lacuna di non possedere ancora gli annali e la storia della Tipografia del Lloyd Triestino¹³ e riprendendo quegli spunti e quelle prime ricostruzioni organiche ancora molto utili ma bisognose di essere aggiornate¹⁴. Nuovi lavori con

¹⁰ Sulla Knjigarna Jaka Štoka e sulla Tiskarna Edinost cfr. le schede di Monica Rebeschini, in *TESEO* '900, cit., pp. 277 e 549.

¹¹ Sulla tipografia Dolec cfr. la scheda di Monica Rebeschini, in *TESEO* '900, cit., p. 165. Sull'editoria slovena si veda soprattutto M. Košuta, *Cronaca di una morte annunciata. L'editoria slovena in Italia durante il Ventennio fascista*, in A. Gigli Marchetti, L. Finocchi (edd.), *Stampa e piccola editoria tra le due guerre*, Milano, FrancoAngeli, 1997, pp. 382-409.

¹² Su Colombo Coen vedi la scheda di M. Callegari, D. De Rosa, P.P. Sancin, in *TESEO. Tipografi e editori scolastico-educativi dell'Ottocento*, cit., pp. 158-159.

¹³ Riferimenti all'attività della Tipografia del Lloyd Triestino sono sparsi in molte opere riguardanti la città. Per notizie più dettagliate cfr. la voce di Archimede Crozzoli e Diana De Rosa dedicata a Ignazio Papsch, primo tipografo del Lloyd Austriaco e poi Triestino, in *TESEO. Tipografi e editori scolastico-educativi, dell'Ottocento*, cit., pp. 422-423. Su una delle imprese più impegnative, «la più economica e la più bella e compita che sia stata fatta mai» la definì Carducci, stampata dal Lloyd Austriaco si veda il saggio di F. Quazzolo, *Un'immagine editoriale dell'Ottocento triestino. La «Biblioteca Classica Italiana» pubblicata da Antonio Racheli per il Lloyd Austriaco*, «Metodi e Ricerche», vol. VII, n. 1, 1988, pp. 75-89; più in generale 1836-1936 *Lloyd Triestino*, Mostra del Centocinquantesimo, Trieste, Lloyd Triestino di Navigazione, 1986, pp. 257-267.

¹⁴ C. De Franceschi, *Giuseppe De Coletti tipografo e giornalista. Contributo alla storia della tipografia e del giornalismo a Trieste*, Parenzo, Stab. Tip. G. Coanna & Figli, 1935, poi ristampato in anastatica in E. Lipott, *Da Gutenberg alla fotocomposizione. Appunti per una storia dell'arte tipografica triestina*, Trieste, Omnia Press, 1982; e soprattutto A.R. Rugliano, *Giuseppe Caprin tipografo artista*, in Lipott, *Da Gutenberg alla fotocomposizione*, cit., pp. 221-276, con una appendice dedicata al catalogo dei libri, dei giornali e delle riviste pubblicati dalla tipografia. Seguendo una traccia di Anna Rosa Rugliano (*L'arte litografica nell'Ottocento triestino*, in Lipott, *Da Gutenberg alla fotocomposizione*, cit., pp. 201-211) si potrebbero anche avviare lavori sulle litografie triestine, molte delle quali condussero una vita grama con l'eccezione parziale di alcuni stabilimenti più duraturi come quelli di Enrico Guttmann, di Vanceslao Stranski, di Natale Zanardini, di Saul Modiano. Quest'ultimo, ricevuta la licenza per produrre carte da gioco nel 1877 e in breve tempo affermatosi come titolare di una ditta solida e in continua espansione, meriterebbe un'autonoma ricostruzione della sua attività. In un contesto più ampio si leggano

l'ambizione di non arrestarsi alla descrizione dello sviluppo e della produzione delle aziende e alla pur necessaria biografia di quei protagonisti, ma capaci di indagare e scandagliare l'intera circolazione del libro¹⁵. Proprio la storia di Trieste e la sua particolare posizione geografica rendono indispensabile questa prospettiva che consentirebbe di analizzare le vicende editoriali e tipografiche della città in un contesto più allargato e dinamico. La vita del libro continuava e si arricchiva in un viaggio lungo e articolato che poteva fermarsi nelle stanze delle biblioteche pubbliche o in quelle delle biblioteche private. Un percorso ancora da ricostruire attraverso l'analisi e la diversità di tutte quelle raccolte formatesi per il diletto delle famiglie nobiliari o di quei ceti professionali, avvocati, ingegneri, medici, che insieme ai commercianti contribuiranno a trasformare l'identità cittadina. Libri che continuavano a diffondersi nei salotti, nei gabinetti di lettura, nei circoli politici e sindacali e che in alcune occasioni, come nel caso del Circolo di studi sociali lodato per questo motivo da Scipio Slataper¹⁶, trovavano un'istituzione «diretta a incrementare l'abitudine del lettore alla consuetudine con il libro e alla disciplina del rispetto verso il patrimonio bibliografico»¹⁷.

Nella Trieste ottocentesca e primo novecentesca converrà dedicare la dovuta attenzione sia alla crescita di un pubblico esigente e variegato, per il quale la forte attenzione per la storia e la letteratura locale si andava sempre più coniugando con altri e più ampi interessi, che all'ampia presenza delle librerie. Un'attività, quella del libraio, che per molto tempo si confonderà con il lavoro tipografico forse non aiutando lo sviluppo di una più agguerrita e preparata specializzazione, né consentendo il radicamento di un mercato antiquario di alto profilo, ma tuttavia promuovendo in modo meno elitario la lettura. La presenza, poi, dopo l'Unità, di librerie di importanti case editrici nazionali aiuterà la città a non accentuare quella sua propensione alla chiusura e all'isolamento. Basti pensare a nomi come Treves, Cappelli, Zanichelli per comprendere lo stimolo esercitato da queste realtà capaci di attirare nei loro cataloghi gli autori più innovativi e di talento, consentendo loro di venire in contatto con altre esperienze culturali, e al contempo costituendo nelle librerie del centro cittadino un luogo

anche i cenni sull'attività tipografico-editoriale contenuti nel saggio di E. Guagnini, *Trieste: ponte tra culture/postazione di confine*, in *Storia d'Italia. Le regioni dall'Unità a oggi: Il Friuli-Venezia Giulia*, a cura di R. Finzi, C. Magris, G. Miccoli, Torino, Einaudi, 2002, Vol. II, pp. 966-968.

¹⁵ In una bibliografia ampia su questo tema rimandiamo come orientamento, a G. Tortorelli (ed.), *Biblioteche nobiliari e circolazione del libro tra Sette e Ottocento*, *Atti del Convegno nazionale di studio*, Perugia, Palazzo Sorbello 29-30 giugno 2001, Bologna, Pendragon, 2002; A. Nuovo (ed.), *Biblioteche private in età moderna e contemporanea*, *Atti del Convegno internazionale*, Udine, 18-20 ottobre 2004, Milano, Sylvestre Bonnard, 2005.

¹⁶ Slataper lodava l'iniziativa del Circolo di studi sociali di dare vita a una «biblioteca a prestito, seria, senza romanzi d'appendice, di più di 2000 opere: l'unica a Trieste che possa servire per studi di sociologia ed economia», in *Lettere triestine col seguito di altri scritti vociani di polemica su Trieste*, postfazione di Elio Guagnini, Trieste, Dedalibri, 1988, pp. 27-28.

¹⁷ Guagnini, *Trieste: ponte tra culture/postazione di confine*, cit., p. 962.

di scambio tra interessi locali e più ampie questioni nazionali. Proprio a causa di queste peculiarità la funzione, il ruolo, la storia del libraio si coloravano a Trieste di caratteristiche singolari. Se infatti è innegabile che, rispetto ad altre città, le figure del tipografo e del libraio rimarranno unite più a lungo, spostando in avanti quei processi di chiarificazione lavorativa propri di un settore in evoluzione¹⁸, è anche vero che la formazione di molti librai risulterà spesso più ricca e avanzata. La conoscenza delle lingue, l'apprendistato svolto in città straniere, la capacità di portare altrove questo bagaglio di esperienze riscattavano una vita professionale che si poteva presentare asfittica e ripetitiva.

È in questo contesto che crescerà l'*humus* dove poi attecchirà la vicenda di Giuseppe Mayländer. Una vicenda che prendeva le mosse dal lontano 1833, data di inizio dell'attività di Friedrich Haugust Schimpff un giovane intraprendente giunto a Trieste da Atene e Smirne dove si era recato adeguandosi all'entusiasmo per la Grecia e seguendo curiosità personali. Acquistata la libreria Boerner, Schimpff in dieci anni sapeva farsi conoscere affermandosi e ingrandendosi anche con l'apertura di filiali a Costantinopoli, Atene, Istanbul, Fiume. Alla sua morte la vedova Anna Jahn, una scrittrice nota con lo pseudonimo di Moritz Horst, cedeva la direzione della libreria a Luigi Bartz che a sua volta passava la proprietà a Heinrich Creutz e Benno May.

Dal 1895 la libreria prendeva nuovo slancio. In quell'anno Max Quidde, già associato come collaboratore, ne diveniva unico proprietario, ampliando la sede in Piazza della Borsa, incrementando una autonoma attività editoriale rivolta in prevalenza alle scuole secondarie inferiori, un campo nel quale in precedenza si era affacciata la Libreria Schimpff, aprendo una sezione antiquaria in via S. Nicolò. Dal 1911 Quidde decideva di dedicarsi esclusivamente alla sua casa editrice che nel 1921 verrà poi rilevata dallo Stabilimento Editoriale e Istituto Editoriale Scientifico di Lodovico Augusto Hezmanstorfer. La vecchia libreria Schimpff, invece, dopo altri passaggi di proprietà, era ceduta prima a Bruno Brückner e poi assorbita nell'orbita della Treves-Zanichelli, diventando dal 1920 la filiale per la Venezia Giulia della Società Anonima Libreria Italiana¹⁹.

¹⁸ Come orientamento su questi passaggi cfr. i saggi di M. Infelise, *La nuova figura dell'editore*; D. Scacchi, *Un associazionismo difficile*; E. Decleva, *Un panorama in evoluzione*, raccolti in G. Turi (ed.), *Storia dell'editoria nell'Italia contemporanea*, Firenze, Giunti, 1997, rispettivamente pp. 55-76; 193-222; 223-298.

¹⁹ Sulla vita e l'attività di questi librai-editori converrà ritornare. Si vedano comunque le notizie contenute nell'articolo di G. Morini, *Libri e librerie a Trieste nel '600, '700, '800*, «Il Tempo di Trieste», n. 5 e n. 6, 1983 e 1984, poi riportate in Cammarata, *Editoria triestina del '900*, cit., p. 275. Per Schimpff la scheda, troppo stringata, di m.c. (Marco Callegari), in *Editori italiani dell'Ottocento. Repertorio*, cit., Vol. II, pp. 981-982, e quella più ampia di Pier Paolo Sancin e Diana De Rosa in *TESEO. Tipografi e editori scolastico-educativi dell'Ottocento*, cit., p. 540. Per Max Quidde cfr. la scheda di Livio Sassi, in *TESEO '900*, cit., pp. 445-446. Sulla tipografia di Lodovico Hermanstarfer e poi sulla sua casa editrice si vedano le notizie date da Livio Sassi in *TESEO '900*, ma anche la figura di Hermanstarfer va approfondita maggiormente sia per il suo autonomo percorso, sia per i collegamenti con il Lloyd Austriaco e l'editore Quidde.

Come sottolineerà Stuparich, essa continuerà ad essere «un modello ospitale e aperto a tutte le correnti» rendendosi «benemerita della cultura triestina». Un luogo di ritrovo e di incontro per il comune cittadino e per personalità come Attilio Mortis, Anita Pittoni, Scipio Slataper, James Joyce, svolgendo anche un ruolo di formazione per futuri librai ed editori nazionali e locali: da Umberto Trani a Eugenio Borsatti²⁰. Era in questo fervore di iniziative partite con l'inizio del Novecento, quando come abbiamo accennato, Max Quidde decideva di dedicarsi solo all'attività di editore mettendo in vendita la libreria antiquaria, che si inseriva Giuseppe Mayländer.

Nato nel 1877 in Croazia, dopo avere abitato e frequentato le scuole di Fiume e Pola, Mayländer era arrivato a Trieste nel 1904 e qui aveva deciso di mettere a frutto i suoi interessi e la sua intraprendenza. Dopo essersi sposato con Flora Edvige Mitzsckerlich di Dresda e avere accresciuto la famiglia di due figlie, aveva rilevato la sezione antiquaria della Libreria Quidde²¹. La scelta si rivelerà vincente. La libreria era già avviata e conosciuta, poteva contare su una clientela stabile e affezionata che si ritrovava nella trafficata San Nicolò, un'arteria che conduceva al mare nella vivace continuità di alberghi, magazzini, negozi. Di fronte alla succursale antiquaria rilevata da Mayländer si trovava

²⁰ Sulla figura di Eugenio Borsatti, direttore dal 1920 della filiale per la Venezia Giulia della Società Anonima Libreria Italiana e poi proprietario della antica libreria alla quale darà il proprio nome, converrebbe maggiormente attirare l'attenzione. Meriterebbe interesse anche la storia della libreria e casa editrice dirette da Carlo Umberto Trani. Sia per l'impegno nel campo dell'editoria scolastica, della letteratura, delle collane e dei singoli studi dedicati alla scienza e all'economia, sia per il ruolo di primo piano svolto nella rappresentanza per la Venezia Giulia di case editrici come Formiggini, Zanichelli, Benporad, Hoepli. Un settore che poi con il passaggio della ditta ai figli, dopo il 1939, prenderà il sopravvento. Per una traccia sulla attualità della Trani cfr. ora la scheda di Monica Rebeschini, in *TESEO '900*, cit., pp. 550-551. Diverso il caso di Ulrico Hoepli che, stando a un cenno nell'articolo della Marini, *Libri e librerie a Trieste nel '600, '700, '800*, pare avesse trovato nel 1867 uno dei primi suoi impieghi nella libreria Schimpff. Questa notizia tuttavia non trova conferma negli studi successivi sull'editore. Maria Jolanda Palazzolo, nella voce per il *Dizionario biografico degli Italiani*, Roma, Istituto della Enciclopedia italiana, 2003, Vol. 61, pp. 715-718, parla di una generica presenza di Hoepli a Trieste, mentre Joseph Jung (nel saggio "*In Labore virtus et vita*" *Ulrico Hoepli 1847-1935*, in E. Decleva (ed.), *Ulrico Hoepli 1847-1937 editore e libraio*, Milano, Ulrico Hoepli, 2001, pp. 141-188) sottolinea (in particul. p. 147) come l'unica esperienza triestina per Hoepli fosse stata quella di aiuto commesso nella libreria Essmann dal 5 settembre 1867 al 5 febbraio 1869. Jung (p. 181, n. 28) precisa che «in diversi articoli [J. H. Hoepli, *Ulrico Höpli's Jugendjahre*, in *Volksblatt vom Hörnli. Hinterthurgauer Heimatblätter*, gennaio 1938; G. Grazzini, *Il faraone dei Manuali. Vita da editore Hoepli*, «Millelibri», 1990, 27] vengono nominati sei soggiorni di lavoro di Hoepli in varie città – tra questi Brackaus, Glöckner und Reclam a Lipsia, Schimpff a Trieste, anche librerie a Stettino e Vienna – che non sono certi o che nel corso del tempo si sono dimostrati falsi. Le tappe lavorative presentate nella presente ricerca sono confermate dalle fonti e la loro stretta successione cronologica esclude la possibilità che Hoepli abbia ricoperto altri posti».

²¹ Per alcune notizie su Mayländer, peraltro tutte da verificare, cfr. E. Bizjak Vinci, S. Vinci, *La libreria del poeta*, con Trieste, Hammerle, 2008, pp. 11-18. Ma converrà indagare meglio sia sugli affetti familiari, sia sulla sua formazione culturale e politica.

la sede della Berlitz School, dove Joyce insegnava inglese, e, accanto, lo stabile dove lo stesso Joyce con la compagna Nora aveva preso una camera in affitto.

L'arrivo di Mayländer a Trieste si risolverà per la città in un acquisto significativo e dinamico per la capacità di mediazione tra le diverse comunità culturali, ma anche per la sincera carica innovativa di alcune esperienze messe in campo. L'attività della libreria non si limitava al mantenimento del comparto antiquario, ma estendeva la vendita anche ai libri moderni e agli spartiti musicali, raggiungendo un discreto successo economico. Soprattutto Mayländer dava l'avvio alle prime prove di quel mestiere di editore, che troverà poi la sua espressione più matura nell'esperienza bolognese, mettendo in cantiere una rivista che a dispetto della sua breve vita, durerà solo un anno, rappresenterà un episodio non banale nella storia culturale di Trieste.

«Il Palvese» usciva il 6 gennaio 1907 e concludeva la sua esperienza il 29 dicembre dello stesso anno dopo cinquantadue numeri. Il nome riprendeva un vocabolo in disuso che indica uno scudo rettangolare capace di coprire l'intera figura del soldato. Uno strumento di difesa e di offesa più volte usato anche in epoca medievale nella composizione a testugine. Dal sesto numero un disegno del pittore Glauco Cambon era inserito accanto al titolo: rappresentava un guerriero nudo che si proteggeva con lo scudo dalle frecce. L'uomo si trovava su una torre merlata dove era inserita la scritta *Limes* e forse dichiarava, con il suo atteggiamento e il vocabolo latino, l'intento e il significato dell'incisione: la difesa virile di *confine* naturale ma anche culturale. L'incisione, tuttavia, non sembrava riscuotere molto entusiasmo se veniva apertamente contestata da un lettore, che non apprezzava né l'eventuale richiamo simbolico né la tecnica dell'artista, per poi essere spostata con intermittenza anche nelle pagine interne. Il periodico, con il sottotitolo «Giornale letterario della Domenica», costava 10 centesimi a Trieste e 12 fuori il capoluogo. Anche l'abbonamento variava, per Trieste e l'Austria-Ungheria era di 5 corone, mentre «per i paesi dell'Unione Postale» aumentava a 8 corone. La stampa era affidata allo Stabilimento Artistico Tipografico G. Caprin di cui si forniva l'anno di fondazione, il 1868, e il luogo di lavoro: un «edificio proprio» posto tra via Giuseppe Caprin n. 7 e via Panfilo Castaldi 12 dove si assumeva «qualsiasi lavoro tipografico». Il ruolo di Giuseppe Mayländer in questa avventura sembrava defilato, ma al contrario non fu affatto marginale. La Libreria Antica e Moderna, questo il nuovo nome scelto da Mayländer, ubicata al 33 di via San Nicolò rappresentava sia l'amministrazione del periodico, sia il suo punto di vista più importante. Mayländer non firmava nessun articolo, ma certo partecipava alla vita redazionale dove faceva sentire la sua voce esprimendo opinioni e suggerimenti. Un lavoro di relazione efficace e importante che tornerà utile, a lui non triestino, per meglio inserirsi nella vita culturale cittadina e per creare con intellettuali e collaboratori della rivista quella comunità di intenti capace di sfociare in alcune proposte editoriali. Aiutato in questo percorso dall'avvocato Giorgio Wondrich, direttore e redattore de «Il Palvese», scrittore e figura conosciuta che

forse aveva fatto coincidere la sua abitazione con la redazione in via Valdirivo 22²², e da Estella Wondrich traduttrice e scrittrice. Wondrich era affiancato da una nutrita schiera di collaboratori: Arduino Berlam, Giuseppe Vidossich, Baccio Ziliotto, Girolamo Tevini, Ferdinando Pasini, Antonio Alisi, Ida Finzi, Umberto Saba, Scipio Slataper, Mario Stenta, Amalia Martinuzzi²³. Alcuni di loro si firmeranno con pseudonimi²⁴.

Il programma risultava a un tempo ambizioso e generico²⁵, tanto poi da allestire «una rivista di opinione, un organo di lotta e di difesa. Ma anche, implicitamente, di conciliazione verso ideali superiori»²⁶. Un'ambiguità e un tentativo di equilibrio che tuttavia difficilmente avrebbero potuto essere evitati in una città dove era arduo sottrarsi al peso della storia. «Il Pavese» usciva emblematicamente nell'anno in cui una parte della cultura letteraria cittadina era impegnata ancora a fiancheggiare lo sforzo di un irredentismo politico dalle varie coloriture che si attardava nella riproposizione accademica di aspetti e figure importanti e nel tentativo di trovare sponde autorevoli per un progetto politico²⁷. Un disegno perseguito comunque in un contesto capace di risentire dei cambiamenti economici avvenuti all'interno di una nuova burocrazia e di

²² Di Wondrich si veda *La rovina. Trilogia sociale*, Zara, Libreria Internazionale E. Schonfeld, 1902.

²³ Per una lista di collaboratori cfr. C. Pagnini, *I giornali di Trieste dalle origini al 1959*, Trieste, Centro Studi, 1959, p. 268. L'accento di Pagnini a «Il Pavese» appare tuttavia davvero troppo risicato per una rivista che, sono sue parole, «parve segnare una epoca nel giornalismo culturale triestino». Sulla fine della rivista Pagnini addossa la colpa a «quel geniale libraio editore che fu Giuseppe Mayländer», colpevole di non aver curato le inserzioni pubblicitarie «che pure gli erano state assicurate». Affermazioni non suffragate da prove e fonti circostanziate. Sul ruolo di Mayländer in questa vicenda manca una ricostruzione accurata: non fu lo stampatore, mentre curò gli abbonamenti, le inserzioni e la vendita, ma non è chiaro quale fosse il suo contributo economico e se altre persone partecipassero all'impresa.

²⁴ Gli pseudonimi più usati erano: Agrypsos (Ferdinando Pasini), Baalbek e Trimalcione (Arduino Berlam), doctor Gaius (Giuseppe Vidossich), don Ferrante (Baccio Ziliotto), Giamoro (Girolamo Tevini), Haydée (Ida Finzi), Umberto da Montereale (Umberto Saba), Old Mole (Mario Stenta), Publio Scipioni (Scipio Slataper), Italo Sennio (Antonio Leiss-Alisi), cfr. C. Pagnini, *I giornali triestini dal 1901 al 1918. Saggio bibliografico*, «Archeografo Triestino», s. IV, voll. XVIII-XIX, n. 2, 1953-1954, p. 344.

²⁵ «Il Pavese raccoglie intorno a sé chiunque rappresenti – entro e oltre i confini – il pensiero e l'arte degli italiani soggetti all'Austria. Simbolo di letizia celebrerà le feste dell'anima moderna nella sua perpetua ascensione verso una forma superiore di vita. Simbolo di tutela difenderà quanto è retaggio della patria, fatto suo per lunghi anni di lotta gloriosa e di fecondo lavoro. Simbolo di lavoro e di baldanza, risponderà all'appello ogni qual volta desiderio di belle prove o villania di atti generosi chiedano un avversario degno. Confortato dall'augurio e dalla promessa de' più eletti ingegni della Nazione, il Pavese inizia oggi a Trieste e saluta amici e confratelli di tutto il mondo» («Il Pavese», n. 1, 6 gennaio 1907).

²⁶ Per un profilo della rivista cfr. E. Guagnini, *Una rivista triestina del primo Novecento «Il Pavese»*, «Rivista di letteratura italiana», vol. XXIII, nn. 1-2, 2005, pp. 125-130.

²⁷ M.L. Premuda, *Scipio Slataper a Trieste*, «Annali della Scuola Normale Superiore di Pisa», s. II, vol. XXV, 1961, soprattutto pp. 232-233, e L. Gasperini, *Attorno al Pavese raccolti i più nuovi ingegni triestini*, «Il Piccolo», 12 luglio 1957, hanno sottolineato, come rileva Guagnini «in modo diverso, anche gli aspetti attardati e accademici della rivista».

una società commerciale proiettata su teatri più vasti²⁸. Con tutte le titubanze e le incertezze, le tensioni si riproponevano in questa annata tanto da potere accogliere quella condizione prevociana più volte sottolineata dalla critica²⁹. Una andata e ritorno Trieste-Firenze che cercava di superare l'attività letteraria di mediocre livello legata a un discorso politico-patriottico, proprio di tutto l'Ottocento, per avviare lo stesso discorso irredentistico su un binario più intimo e sofferto³⁰.

Della triade Carducci-Pascoli-D'Annunzio, un'indicazione valida per tutto un gruppo di scrittori che ne utilizzerà suggestioni e suggerimenti cogliendone «indicazioni tematiche e linguistiche, con un occhio di riguardo verso gli spunti politici e nazionali presenti nelle loro opere»³¹, sarà sicuramente Carducci ad avere su «Il Pavese» una posizione preminente. Confermando tra Otto e Novecento quella centralità nella cultura triestina ben rappresentata da strenne, numeri unici, antologie, tentativi di imitazione attraverso una ripresa di contenuti e di metrica³². Un culto, bisogna sottolineare, che per i poeti triestini ammiratori e imitatori significava anche «acquisizione di un patrimonio di ideologia e tecnica poetica: per esempio, poesia, con e su immagini storiche, uso di metrica barbara, classicismo coniugato a stimoli patriottici»³³. Il primo intervento dedicato a Carducci era un breve necrologio pubblicato in ritardo³⁴. «Ora che il flusso della retorica è sedata – scriveva una nota redazionale – vogliamo dire quello che avremmo detto ieri». La prima questione sulla quale bisognava fare chiarezza era che «la generazione che vide operare il Carducci non è la nostra»: il poeta declinava mentre «noi entravamo nella vita». In questa sfasatura di gusti, di tematiche, di tempi, i giovani letterati dovevano

²⁸ Su questi cambiamenti cfr. A. Millo, *L'elite del potere a Trieste. Una biografia collettiva 1891-1938*, Milano, Franco Angeli, 1989.

²⁹ B. Maier, *Condizione della letteratura triestina del Novecento*, in Id., *Saggi sulla letteratura triestina del Novecento*, Milano, U. Mursia & C., 1972, pp. 3-9.

³⁰ Numerosi i contributi sui rapporti culturali tra Trieste e Firenze, ma si vedano soprattutto *Intellettuali di frontiera. Triestini a Firenze (1900-1950)*, mostra documentaria coordinata da M. Marchi, catalogo a cura di M. Marchi, E. Pellegrini, R. Pertici, N. Sistoli Paoli, L. Steidl, Palazzo Strozzi 18 marzo-22 aprile 1983, Firenze, Comune di Firenze-Gabinetto G.P. Vieuxseux, 1983, e R. Pertici (ed.), *Intellettuali di frontiera. Triestini a Firenze (1900-1950)*, 2 voll., Firenze, Leo S. Olschki, 1985.

³¹ Cfr. gli accenni in Guagnini, *Trieste: ponte tra culture/postazione di confine*, cit., pp. 988-993.

³² Si pensi alla fortuna triestina di poesie come *Miramar* e *Saluto italico*. Quest'ultima pubblicata nel 1879 sia nella strenna *La stella dell'esule* che nel giornale irredentista «La giovane Trieste» con il titolo *Giosuè Carducci a Trieste e Trento*. Ma si pensi anche alla figura e al ruolo avuto dall'irredentista Giuseppe Picciola, nato a Parenzo, normalista, insegnante a Bologna, studioso di Dante e Carducci, Picciola, come sottolinea Elvio Guagnini, avrà su Carducci una notevole influenza stimolando «la sua attenzione su problemi ed venti triestini e giuliani» e allestendo sia la raccolta *Poeti italiani d'oltre i confini* (uscita postuma a Firenze nel 1914 e poi in riedizione nel 1919 con il titolo *Poeti dell'Italia redenta*) che l'importante e fortunata *Antologia carducciana* edita da Zanichelli nel 1908 e curata insieme all'amico Guido Mazzoni.

³³ Guagnini, *Trieste: ponte tra culture/postazione di confine*, cit., p. 993.

³⁴ *Giosue Carducci*, «Il Pavese», 24 febbraio 1907.

guardare «non al Carducci che fu», al poeta maturo, seduto oramai sul trono della celebrità, ma «al seme da fecondare, più che alla storia, all'arte». La generazione presente doveva assumersi il compito di non lasciare soffocare «la fiamma inestinguibile dell'azione» dalle «ceneri della retorica». Non tanto una spaccatura, quanto una doverosa puntualizzazione ripresa anche nel numero speciale del 17 marzo 1907 dove, accanto a poesie e articoli celebrativi, si potevano leggere le considerazioni critiche affidate da Ferdinando Pasini al suo pezzo *Commemorazioni oziose*³⁵. E per oziose, chiariva Pasini, non si intendevano tanto quelle commemorazioni dettate dalla superficialità e dall'invidia, quanto quelle che «esaltano nel Carducci uno dei principali fattori dell'Italia moderna». In questa che appariva una «oscena fiera di vanità rumoreggiante attorno al cadavere ancora caldo» bisognava invece con forza ribadire che Carducci non solo non aveva fatto l'Italia, ma «essa è andata in Campidoglio senza di lui e a malgrado lui». Per vedere realizzate finalmente le legittime aspirazioni della nazione era necessario quindi recuperare Carducci andando oltre il suo messaggio scoprendolo nel palpito e nell'entusiasmo «dei suoi legittimi eredi Pascoli e D'Annunzio». La lezione del poeta rimaneva sospesa tra un livello di impegno, capace di spronare all'azione dando identità alle battaglie culturali e politiche degli scrittori³⁶, e più meditati ripensamenti³⁷.

³⁵ Il sommario comprendeva: G. Lesca, *In morte di Giosue Carducci*; A. Panzini, *I gnomi intorno al gigante*; G. Mazzoni, *Una lezione di metrica*; V. Vittori, *Il maestro*; O. Montanari, *Giosue Carducci buono*; V. Crescini, *Giosue Carducci*; F. Pasini, *Commemorazioni oziose*. Nella rubrica *Rassegne*, anch'essa interamente dedicata al legame tra Carducci e la regione, si presentava l'iniziativa di Trieste, «che fra le città italiane sentì battere più trepido il suo cuore all'annuncio della morte del Poeta», per assegnare ogni cinque anni un premio dell'Accademia dei Lincei alternativamente a un volume di versi e a un libro di critica letteraria. Una onoranza, si sottolineava, «ben più gentile e più feconda che non marmo scolpito» e certo meglio concepita di generiche borse di studio o premi agli studenti. Piuttosto, sottolineava «Il Palvese», l'esperienza nella assegnazione di premi «e come il modo distolga spesso i migliori», induceva a chiedere «che cotesto concorso sia circondato dalle cautele più fini atte a rimuovere l'abuso». Un risultato che poteva essere raggiunto attraverso la «delimitazione del tema, tenendo conto di quegli argomenti ai quali il Grande o aveva rivolto il proprio sguardo o aveva volta l'attenzione dei propri allievi» e la larghezza nella ammissione di ogni forma di «pertrattazione». Infine piuttosto che ad una accademia, la rivista avrebbe preferito «che l'assegnazione fosse affidata ad una Commissione convocata in Trieste stessa, e di cui fossero chiamati a far parte letterati concittadini; se non per altro, per la maggiore affermazione».

³⁶ Su questo tema cfr. gli spunti contenuti in E. Guagnini, *L'identità veneta nella poesia degli scrittori «d'oltre i confini» tra secondo Ottocento e primo Novecento*, in T. Agostini (ed.), *L'identità delle Venezie (1866-1918)*, Roma-Padova, Antenore, 2002, pp. 102-103.

³⁷ Si vedano su «Il Palvese» gli articoli di Arturo Farinelli, *Giosue Carducci*, usciti il 7 luglio 1907, il 14 luglio 1907, il 21 luglio 1907 e il 28 luglio 1907. Articoli poi raccolti in un volumetto per le Edizioni «Il Palvese» e messo in vendita al prezzo di 1 corona presso la Libreria Mayländer. Per questa notizia cfr. *Giosue Carducci. Discorso commemorativo*, «Il Palvese», 20 ottobre 1907. La parte più combattiva e pubblica della figura di Carducci era affidata a un articolo di Giuseppe Picciola, *Una lettera di Giosue Carducci*, «Il Palvese», 24 marzo 1907 e alle numerose notizie su commemorazioni, lapidi, ricordi, contenute nella rubrica *Rassegne* del 24 marzo 1907; 9 giugno 1907; 8 settembre 1907.

Un'oscillazione presente anche negli articoli dedicati ad altre due figure care agli intellettuali triestini, Dante e Pascoli³⁸.

A parte questi interventi e il numero del 24 febbraio 1907 interamente dedicato a Goldoni, con articoli di Giuseppe Caprin, Cesare Musatti, Maria Merlata, Giulio Piazza, Giacinto Gallina, Baccio Ziliotto, era nel confronto polemico per una diversa conduzione delle istituzioni culturali e amministrative pubbliche che «Il Pavese» rivendicava una sua presenza civile. Nel sesto numero del 10 febbraio 1907 la rivista con un articolo redazionale salutava con la proposta della cittadinanza onoraria per Attilio Hortis il ritorno, dopo la parentesi parlamentare, alle incombenze cittadine e più precisamente alla conduzione della Biblioteca comunale orfana di una guida prestigiosa e «dei fastigi a cui era solita». Una luna di miele e un'attesa che comprendevano anche il rilancio dell'«Archeografo triestino», durati poco se in due interventi del 23 giugno e del 4 agosto, firmati entrambi dalla redazione e quindi coinvolgendo l'intera rivista, si esprimeva con durezza tutta la delusione per questo ritorno. «Massima venerazione» per Attilio Hortis e difesa senza indugi della sua figura quando «l'ignoranza e lo spirito settario in tonaca nera» lo avevano attaccato, ma l'ammirazione non poteva «onestamente esimere dal criticare l'istituzione a lui affidata». Nonostante «l'erudizione bibliografica sterminata» di Hortis, nonostante l'aiuto di Camillo De Franceschi, «conoscitore profondo delle fonti di storia patria», e malgrado gli aiuti congiunti del Comune, della Società di Minerva, dei cittadini, la Biblioteca era ridotta in locali dove non si sapeva se lamentare di più «l'indecenza e la ristrettezza o il difetto di tranquillità, o il pericolo continuo». Da questa condizione derivava «lo stato miserando dei libri guasti e logori prima del tempo» e dei cataloghi ordinati solo per materie e con le schede fuori posto. Nessuna prevenzione era adottata per evitare i furti e in compenso fioriva «il prestito dei romanzi, sicché la biblioteca faceva la concorrenza alle librerie circolanti», mentre gli acquisti avvenivano per «soddisfare il capriccio dei librai o delle singole persone». La sala di lettura, infine, era perennemente occupata «dai ragazzi che vengono a sfogliare le illustrazioni e dagli studenti del Ginnasio che qui trovano pronte a loro disposizione tutte le traduzioni dei classici». Di fronte a questo sfacelo il compito di Attilio Hortis si presentava assai arduo, non solo perché era necessario affrontare problemi contingenti non di poco conto, ma anche per la necessità di riannodare i fili con una cittadinanza disamorata e disillusa dai continui disservizi³⁹. Che uno

³⁸ F. Pasini, *Un filosofo ed un poeta*, «Il Pavese», 14 aprile 1907, dedicato a un vaglio critico delle pagine di Croce su Pascoli; G. Albanese, *Pascoliana*, «Il Pavese», 1 settembre 1907; A. Farinelli, *Dante e Pascoli*, «Il Pavese», 21 aprile 1907; Id., *Dante e i romanzi cavallereschi*, «Il Pavese», 17 febbraio 1907. Oltre ai riferimenti a Dante e Pascoli nel lavoro di Guagnini già citato, per Pascoli cfr. anche B. Maier, *La fortuna del Pascoli nella letteratura giuliana e il «pascolismo» di Renato Rinaldi*, in Id., *Saggi sulla letteratura triestina del Novecento*, cit., pp. 53-62.

³⁹ Nell'articolo del 23 giugno faceva seguito una nota nella rubrica *Rassegne* che non solo appoggiava la denuncia della rivista, ma aggiungeva anche i gravi problemi dell'ordinamento dei

scollamento fosse avvenuto nella città già agli inizi del Novecento tra le nuove istanze sociali, economiche, politiche e gli strumenti culturali che dovevano accoglierle, stimolarle e interpretarle, veniva ribadito nell'articolo *Archeografo triestino*. Un attacco alla rivista che «stiracchia la sua vita e manda soltanto di tanto in tanto qualche guizzo che, per quanto luminoso, sembra preludere alla estinzione». Anche in questo caso motivo del declino era «l'incuria e l'apatia del pubblico» che, forse distratto oramai da altri interessi e altre urgenze, regalava alla rivista solo 55 abbonati, comprese le librerie e le società. D'altra parte, concludeva l'articolo, la decadenza dell'«Archeografo triestino» derivava dall'ambiguità e oscillazione della linea culturale e dal compito che la rivista si era prefisso, combattuta tra il tentativo di tenere conto sempre di più di un pubblico orientato verso nuovi interessi e la necessità di dovere supplire alla mancanza di istituzioni locali come la Deputazione di storia patria.

Accanto a questi temi ve ne erano altri che riguardavano maggiormente l'attività letteraria di alcuni collaboratori con la pubblicazione di poesie, traduzioni, novelle, riflessioni filosofiche. Ne erano autori Egidio Fabbro e Giuseppe Vidossich con interviste su Ibsen e Rétif de la Bretonne⁴⁰, Santorre Debenedetti su Foscolo⁴¹, Giulio Caprin su Maeterlinck⁴², Giorgio Wondrich su Oscar Wilde e Buddha⁴³. Senza dimenticare la prove di Saba, Slataper⁴⁴ e soprattutto il rilevante, anche per numero di articoli, contributo di Silvio

cataloghi e degli orari di apertura, cfr. *Rassegne*, «Il Palvese», 7 luglio 1907. Manca comunque una ricostruzione attenta dell'attività di Attilio Hortis nella Biblioteca civica di Trieste, solo un cenno nella voce di Michele Gottardi per il *Dizionario biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, 2005, Vol. 61, pp. 734-738.

⁴⁰ E. A. Fabbro, *Un monumento a Enrico Ibsen*, «Il Palvese», 13 gennaio 1907; G. Vidossich, *Rétif de la Bretonne*, «Il Palvese», 20 gennaio 1907.

⁴¹ S. Debenedetti, *Cino da Pistoia nei giudizi del Foscolo*, «Il Palvese», 24 marzo 1907.

⁴² G. Caprin, *Maurice Maeterlinck e l'immortalità dell'anima*, «Il Palvese», 13 ottobre 1907. Di Caprin venivano pubblicate la poesia *La duna*, «Il Palvese», 16 giugno 1907 e la recensione (*Due opere di humor*, «Il Palvese», 30 giugno 1907) a *La lanterna di Diogene* di Alfredo Panzini e *Compagnia della leggera* di Luciano Zuccoli.

⁴³ O. Wilde, *L'usignolo e la rosa*, traduzione di Giorgio Wondrich, «Il Palvese», 18 agosto 1907; G. Wondrich, *Buddha*, «Il Palvese», 3 febbraio 1907.

⁴⁴ Sulla presenza di Saba e Slataper nelle pagine de «Il Palvese» cfr. G. Baroni, *Rivisitazione de «Il Palvese»*, in Id., *Umberto Saba e dintorni. Appunti per una storia della letteratura giuliana*, con quattro illustrazioni di Arnaldo Fontana, Milano, Propaganda Libreria, 1984, pp. 271-276. Il volume contiene un'appendice, *Pagine rare di Umberto Saba e di Scipio Slataper*, dove sono inserite le prime prove di Saba e Slataper firmate su «Il Palvese» con gli pseudonimi Umberto da Montereale (*Intorno a Ofelia Mazzoni*, «Il Palvese», 23 dicembre 1907 poi nel volume pp. 279-284) e Publio Scipioni (*Lo spirito del Tasso*, «Il Palvese», 10 novembre 1907 e *Esseri*, «Il Palvese», 6 ottobre 1907, nel volume pp. 284-295). Il breve intervento di Baroni è il più acuto e interessante tra i non molti dedicati alla rivista, oltre per gli spunti che si possono ancora riprendere e approfondire anche per l'equilibrato giudizio di insieme: «Ed è proprio questo il punto: «Il Palvese», nato in un momento di transizione, vide nelle sue file gli ultimi di quella categoria di letterati che avevano dato a Trieste una produzione provinciale emula, a vario livello, di quella nazionale e i primi protagonisti della nuova letteratura triestina che, a prescindere da ogni disputa eziologica e di definizione, spicca per originalità a livello qualitativo», in *Umberto Saba e dintorni*, cit., p. 272.

Benco⁴⁵. Estella Wondrich accompagnerà la rivista sino la ventiduesimo numero, in quello del 9 giugno si comunicava che era deceduta investita da una macchina. Il ricordo della redazione sottolineava i suoi contributi alla rivista, ma la vivacità degli interessi e la forte passione per le lingue e la poesia lasciavano immaginare un coinvolgimento autentico e profondo al dibattito culturale avviato da «Il Palvese»⁴⁶.

La rivista, che dal mese di settembre aveva trasferito la redazione in via Torre Bianca 10, si avviava comunque a chiudere i battenti. Rimangono da segnalare gli interventi sulla scuola, l'università⁴⁷, la cultura⁴⁸, l'impegno di Arduino Berlam⁴⁹, la pubblicazione ancora di racconti e poesie⁵⁰, il devoto omaggio a Graziadio Isaia Ascoli⁵¹. A scongiurare la fine non basteranno né il lancio di

⁴⁵ S. Benco, *L'esilio. Poema in prosa di Paolo Buzzi*, 6 gennaio 1907; Id., *L'oriente veneziano. Romanzo di Giuseppe Brunati*, 3 marzo 1907; Id., *Novellatori d'oggi e di domani*, 14 aprile 1907; Id., *La meccanica letteraria*, 16 giugno 1907; Id., *La fonte, la fiamma e l'incubo*, 28 luglio 1907; Id., *Il nuovo romanzo di Jolanda*, 27 ottobre 1907. Nella Doria Cambon dedicherà a Benco la poesia *Il castello dei desideri*, «Il Palvese», 21 luglio 1907.

⁴⁶ E. Wondrich, *Marianna di Willemer*, «Il Palvese», 6 giugno 1907; Ead., *De excelsis*, «Il Palvese», 16 giugno 1907; Ead., *Dalle "Vignette". Poesie in prosa*, «Il Palvese», 24 maggio 1907. Notizie su di lei nella rievocazione La Redazione, *Estella Wondrich*, «Il Palvese», 9 giugno 1907. Nata nel 1883 a Graz aveva avuto una educazione «eletta, siccome permetteva l'agiatezza della famiglia». Una grande domestichezza aveva con le lingue: conosceva il francese e l'inglese, del latino «era tanto dotta da potere fare di Orazio una lettura prediletta». Il tedesco era «la sua lingua materna», mentre l'italiano «era diventato per lei il linguaggio dell'affetto». Le sofferenze fisiche erano state alleviate dalle «gioie pacifiche della famiglia» e «dall'estasi della poesia». La sua produzione si era evoluta e dai primi saggi, «segni sicuri di bellissimo ingegno», era passata a un volume di versi *Floreal* stampato a Dresda, «in cui oltre alle bellezze formali, fu ammirata la cultura classica dell'autrice, e l'attitudine a trovare di ogni dove i fantasmi della poesia». Una prova in cui «il lettore italiano sentiva nel verso tedesco a volte un volume nostrale: Giovanni Pascoli», a lui Estella Wondrich «da più tempo aveva rivolto ogni cura, per una spirituale vicinanza di bontà e di dolore», traducendo anche alcune liriche e pubblicandole su riviste tedesche. Nelle poesie, come nel romanzo incompiuto *Il gran pan non è morto*, concludeva l'articolo, predominavano «note di malinconia e di quella bontà che senza cadere nel perdono, libera e redime perché comprende».

⁴⁷ P. Marini, *La nostra scuola e l'attuale momento politico*, «Il Palvese», 9 giugno 1907, e le discussioni nella rubrica *Rassegne* del 9 giugno, 16 giugno, 30 giugno 1907.

⁴⁸ G. Morpurgo, *Marcellino Berthelot*, «Il Palvese», 7 aprile 1907; la discussione sugli studi filosofici in Italia in *Rassegne*, «Il Palvese», 16 giugno 1907; F. Pasini, *Il problema umanitario. I Metodi* e Id., *Il problema umanitario. Gli ideali*, «Il Palvese», 20 maggio 1907; Id., *Il dovere della tolleranza*, «Il Palvese», 3 febbraio 1907; Id., *La cultura de' letterati*, «Il Palvese», 13 gennaio 1907; l'articolo redazionale *La nuova fase della questione umanitaria*, «Il Palvese», 17 novembre 1907.

⁴⁹ Tra gli interventi di Berlam vedi *Il poeta dell'acquaforte. Luigi Conconi*, «Il Palvese», 27 gennaio 1907.

⁵⁰ V. Aganoor Pompilj, *Il canto della gioia*, «Il Palvese», 20 gennaio 1907; R. Bracco, *Vantaggi e pericoli del Teatro Comunale*, «Il Palvese», 20 gennaio 1907; P. Orano, *Motivi romani*, «Il Palvese», 31 marzo 1907.

⁵¹ G. Vidossich, *Graziadio I. Ascoli*, «Il Palvese», 27 gennaio 1907; *Rassegne*, «Il Palvese», 12 maggio 1907, dove si dava conto dell'auspicio della Società filologica romana, che aveva Ascoli tra i soci, perché si creasse una Fondazione intitolata allo studioso. Nell'occasione si lanciava una sottoscrizione tra gli studiosi di discipline filologiche da devolvere al miglior lavoro di dialettologia romanza. La rivista si impegnava a fare pervenire alla Fondazione la somma raccolta. Nella rubrica

abbonamenti straordinari semestrali dal primo luglio al trentuno dicembre⁵², né gli incoraggiamenti e gli attestati di stima arrivati da tanti intellettuali⁵³.

Pure in questa fase la “Libreria antica e moderna” – dove, come recitava un’inserzione pubblicitaria apparsa su «Il Palvese» del 2 giugno 1907, si potevano trovare libri e riviste di tutti i generi e in tutte le lingue insieme a un grande deposito di volumi a metà prezzo e alla rappresentanza di case editrici come Hoepli, Treves, Baldini e Castoldi, Bocca, Paravia, Loescher – rimaneva al centro degli interessi economici e culturali di Mayländer e sarà ancora dalla libreria che l'intraprendente Mayländer ripartiva per avviare la sua esperienza editoriale. Anche questo tentativo rimarrà di breve durata, ma certo non inutile per confermare il radicamento locale del progetto avviato con «Il Palvese». Del resto proprio il *Congedo*, scritto dalla rivista nell'ultimo numero del 29 dicembre 1907, aveva sottolineato che moriva «Il Palvese» ma non si spegneva «la famiglia ardente» che aveva fornito linfa e interessi⁵⁴: perché quell'esperimento aveva «stretto amicizie, attirato nella nostra orbita altri giovani, stimolato gli interessi latenti». Con queste premesse non possiamo meravigliarci se nelle edizioni ritroveremo come autori alcuni dei più noti collaboratori del periodico. Silvio Benco sarà uno di questi, scrivendo l'introduzione alla raccolta di opere del pittore Umberto Veruda e una monografia su Trieste uscita in quella collana, *La Venezia Giulia e la Dalmazia*, reputata ancora una delle poche prove dell'editoria cittadina degna di essere ricordata⁵⁵. Il volume su Veruda confermava l'interesse culturale che da tempo circolava intorno al suo nome e veniva dopo la pubblicazione su un numero de «Il Palvese» di un bozzetto datato 1893, «quando ancora lo spirito del pittore ferveva nella ricerca di nuove fonti d'arte»⁵⁶.

Il 6 ottobre 1907 nella rubrica *Rassegne*, in un breve articolo non firmato, si dava notizia che l'editore Mayländer aveva pubblicato «in elegantissimo fascicolo» un riassunto della produzione di Veruda facendolo precedere da uno scritto di Silvio Benco, «che fu quasi l'araldo della sua fama», ripreso dall'introduzione apparsa nel *Catalogo* della esposizione delle opere di Veruda tenuta nel 1904. Si precisava comunque che la scelta per il volume

Rassegne, «Il Palvese», 2 giugno 1907, Giorgio Pitacco si soffermava sulle iniziative prese dalla città di Gorizia per onorare la figura di Ascoli.

⁵² L'annuncio si può leggere in «Il Palvese», 2 giugno 1907.

⁵³ Due elenchi furono pubblicati nei numeri del 20 e 22 gennaio 1907.

⁵⁴ *Congedo*, «Il Palvese», 29 dicembre 1907, conteneva anche qualche amara riflessione sul contesto cittadino. La rivista cessava per generiche «ragioni amministrative», ma si parlava esplicitamente di «nemici che sospettarono l'industria dove era l'idea, l'ambizione dove era l'affetto e la gioia, che ci combatterono per ragione di consuetudine, per ragione di contesto, per ragione di malignità». Era mancato «l'appoggio del pubblico», non ancora maturo, ma già in cammino per apprezzare e sostenere esperienze più mature.

⁵⁵ E. Guagnini, *La cultura. Una fisionomia difficile*, in E. Apih, *Trieste*, Roma-Bari, Laterza, 1988, p. 294.

⁵⁶ *Rassegne*, «Il Palvese», 31 marzo 1907.

Mayländer non era avvenuta tenendo presente solo «criteri storici o estetici», perché la difficoltà nel procurarsi le fotografie necessarie aveva indotto l'editore «ad omettere qualche lavoro più cospicuo e ad accettare qualcuno meno significativo». Questa selezione obbligata si era poi riversata negativamente nella disposizione delle immagini, «che non pareva del tutto accettabile», e nella mancanza di nitidezza in alcune riproduzioni. Perché e manchevolezze da non addebitarsi comunque solo all'editore che aveva dovuto lavorare non sui negativi, ma su fotografie «non limpide né fresche»⁵⁷. Benco, nell'introduzione, partiva dal ruolo significativo avuto da Veruda nello sviluppo artistico di Trieste. Una parte importante che si era rivelata nel giorno della scomparsa quando la «commozione angosciosa» aveva assalito tutti i cittadini e anche coloro che possedevano «gli intelletti più oscuri» e «gli animi men visitati dell'arte» erano stati sopraffatti dal «senso di soppressione violenta di una forza che cresceva». L'esempio e l'ardore della sua opera erano riusciti a formare «nella terra natia una concezione pittorica della nuova generazione affatto dissimile da quella che era stata fino al suo avvento», tanto da unire il suo nome «alla rivelazione e alla battaglia del grande movimento impressionista e realista nell'arte moderna». Pittore «di temperamento e di istinto», cresciuto «con molto coraggio e poca scuola», Veruda aveva riconosciuto in Velasquez un'autorità per quel suo essere «padrone di ogni chiarezza della luce» ed era rimasto impressionato «dal realismo un po' crudo e secco del Liebermann nella sua energica maniera di ricavare le forme della vita». Tuttavia, secondo Benco, «per quelle influenze conscie ed inconsapevoli che sempre più lo avvinsero alle grandi tradizioni della scuola veneta e dell'anima patria», sarà Giacomo Favretto a lasciare le tracce più consistenti nella sua esperienza giovanile. Attraverso la consuetudine con «il grande pittore aneddotico» veniva sollecitato in Veruda «l'estro della vita popolare, della macchietta maliziosa, del colore fatto interprete della gioia di vivere».

Lo iato tra il prima e il dopo, tra i notevoli progressi compiuti a Roma e il ritorno nel 1891 a Trieste, «dove rivedi più volte intorno ai suoi quadri le stesse parole, le stesse formule di tre anni prima: mancanza di disegno, pletora di colorito, impasto ardito e brutale per irrefrenabile avventatezza di temperamento», era la caratteristica notata da Benco in questa seconda fase. L'ulteriore progresso e distacco veniva affidato ancor al viaggio, momento di discontinuità e medicina salutare per lenire le inquietudini ricorrenti: Monaco, Berlino, Londra, Vienna, ma soprattutto Parigi, dove imponendosi lo studio del disegno, Veruda acquisiva «una agilità, una nervosità e una fermezza di controllo» che al contempo rigenerava e attutiva «l'impressione della forma ricavata soltanto dall'audace impasto di colori». Nella vita artistica di Veruda, concludeva Benco, si potevano distinguere così due parti lunghe dieci anni ciascuna: «la prima contrassegnata dall'esistenza di elementi audaci d'arte

⁵⁷ *Rassegne*, «Il Palvese», 6 ottobre 1907.

nuova, di espressione immediata di realtà [...], la seconda era quella dell'artista tutto liberato, tutto sgombro, che non discute più sui limiti divisorii fra la realtà e l'arte, ma segue naturalmente, fiduciosamente, la sua aspirazione verso ogni forma quale egli la vede nell'avvolgente poesia della luce»⁵⁸.

La critica di Silvio Benco all'opera di Umberto Veruda, con osservazioni riprese negli studi successivi⁵⁹, si legava nel 1910 alla breve monografia illustrata pubblicata da Mayländer su Trieste che raccontava la lunga fedeltà di Benco alla esplorazione e allo studio della sua città⁶⁰. Il volume ricevette un

⁵⁸ S. Benco, *Umberto Veruda*, in *Umberto Veruda*, Trieste, Libreria Giuseppe Mayländer, 1907, l'introduzione di Benco, senza paginazione, non è segnalata sul frontespizio. Il volume era stampato dalla Tipografia Moderna M. Susmel & C., mentre le riproduzioni delle opere erano affidate allo Stabilimento d'Arti Grafiche S.D. Modiano. Dell'opera vi era anche una edizione speciale su carta a mano di 75 esemplari numerati.

⁵⁹ Benco dedicherà altri scritti a Umberto Veruda: oltre all'introduzione al catalogo *Umberto Veruda*, Trieste, Tip. Samba, 1910, pp. I-IV, ripresa nel volume Mayländer, anche *Venticinque anni dalla morte di Umberto Veruda. La figura singolare e l'opera geniale del grande pittore*, «Il Piccolo», 29 agosto 1929 e *Umberto Veruda*, «Mondo unito», 28 febbraio 1946, p. 3. Si vedano, per i lavori di Benco, S. Pesante, *Bibliografia degli scritti di Silvio Benco*, Trieste, Il Comitato per le onoranze a Silvio Benco, s.d. (ma 1950) (che contiene, senza che se ne dia notizia sul frontespizio, una *Nota biografica* e una breve presentazione di Giani Stuparich) e le *Appendici bibliografiche* a S. Benco, *Scritti di cultura letteraria e figurativa*, a cura di O. Honorè Bianchi, B. Maier, S. Pesante, saggio introduttivo di B. Maier, Trieste, LINT, 1997, pp. 482-491. Nel volume è riprodotta (pp. 368-373) l'introduzione di Benco alla monografia su Veruda, pubblicata nel 1907 da Mayländer, e Bruno Mayer nello studio *L'attività saggistica di Silvio Benco* (pp. 11-26) sottolinea, ricordando anche i lavori su Veruda, come «ancora una volta risulta esplicita la capacità di Benco, di delineare in icastici, finissimi, pertinenti 'ritratti' le personalità, per esempio, di Masaccio, Mantegna, Tintoretto, Van Gogh, Klimt, Giorgione, Tiziano, Veronese, come pure di cogliere il significato e la portata storico-culturale di alcuni movimenti artistici quali l'Impressionismo e l'Espressionismo, o di recensire con vigile attenzione tante esposizioni locali di cultura e di scultura». Considerata nel suo complesso, continua Mayer, «la critica di Silvio Benco sorprende per la ricchezza degli argomenti trattati, per la conoscenza diretta e precisa di innumerevoli autori italiani e stranieri, per la pertinenza e, talora, per la ragionata audacia dei collegamenti e degli accostamenti; e stupisce inoltre per la puntualità e l'acutezza dei giudizi, per la finezza delle notazioni psicologiche, estetiche e stilistiche, per la vaghezza, sempre elegante e aristocratica, e in certo senso classica del linguaggio». Per Mayer resta da sottolineare che non sono molti i saggisti di estrazione giornalistica (e non accademica) di cui si possa dire altrettanto e come Benco debba essere collocato accanto a Serra, Ojetti, Borgese, Pancrazi, De Robertis: «dimostrando ulteriormente quale maestro aperto e liberarle, mai aridamente e opacamente cattedratico, sia stato il Benco». Come critico, oltre a numerose prefazioni a cataloghi di mostre e raccolte di artisti, Benco scrisse anche nel 1944 e nel 1945 le monografie sui pittori triestini Carlo Sbisà e Napoleone Fiumi, cfr. B. Maier, *Silvio Benco critico delle arti figurative*, «Pagine istriane», vol. I, n. 2, 1950, pp. 18-25. Un accenno all'interesse di Benco per le arti figurative, ma all'interno di un lavoro dedicato alla critica e alle prove letterarie, anche nel saggio di Francesco Flora contenuto in *Celebrazioni di Silvio Benco*, discorsi di R. de Courten, F. Flora, Trieste, Circolo della cultura e delle arti, 1957, p. 15. Secondo Flora sono prova degli interessi di Benco per le arti figurative anche le felici riflessioni contenute nella *Contemplazione del disordine*, pubblicato a Udine nel 1946, ora compreso in Benco, *Scritti di critica letteraria e figurativa*, cit., pp. 413-480. Datata la voce di Emerico Giachery in *Dizionario biografico degli Italiani*, Roma, Istituto della Enciclopedia italiana, 1966, Vol. 8, pp. 222-223, che non accenna neanche all'importante ruolo svolto da Benco in questo campo.

⁶⁰ Una seconda edizione dell'opera pubblicata da Mayländer verrà stampata nel 1973 dalle

premio dal Comune⁶¹ ed era recensito con osservazioni significative da Scipio Slataper, sino alla bella rievocazione fattane da Alberto Spaini che metteva in luce l'abilità letteraria, ma anche l'uso del colore e del ricordo, esercitate da Benco nel descrivere scorci e particolari della sua città⁶². Dopo la pubblicazione di questo volume la collana continuava con le due monografie dedicate da Baccio Ziliotto e Attilio Tamaro a Capodistria e Pirano⁶³, entrambe uscite

Edizioni «Italo Svevo». Oltre a un grande numero di articoli pubblicati su giornali e riviste tra i saggi storici di più largo respiro si vedano: S. Benco, *Gli ultimi anni della dominazione austriaca a Trieste*, 3 voll., Roma-Milano e Trieste, Casa editrice Risorgimento, 1918; Id., *La Società Ginnastica a Trieste, 1863-1920*, Trieste, Edizioni Società della Ginnastica, 1920; S. Benco (ed.), *«Il Piccolo» di Trieste. Mezzo secolo di giornalismo*, Milano-Roma, Treves-Treccani-Tumminelli, 1931; Id., *Trieste*, Firenze, Nemi, 1932, apparso nella collana *Visioni spirituali d'Italia*; Id., *Trieste e il suo diritto all'Italia*, introduzione di S. Satta, Bologna, Cappelli, 1952. Satta aveva pubblicato l'introduzione anche in «Umana», 30 settembre 1951.

⁶¹ L'avvenimento è segnalato da Pesante, *Bibliografia degli scritti di Silvio Benco*, cit., p. IX.

⁶² Cfr. l'articolo di Slataper in «La Voce», 10 novembre 1910, ora in G. Baroni, *Trieste e «La Voce»*, Milano, Istituto Propaganda Libreria, 1975, p. 128. Un cenno a questo intervento in C. Benussi, *Benco irredentista e dannunziano*, in C. Benussi, G. Lancellotti, *Benco - D'Annunzio. Epistole d'Irredentismo e letteratura*, Trieste, LINT, 1998, p. 15. A proposito di *Trieste*, Alberto Spaini nel suo *Autoritratto triestino*, Milano, Giordano, 1963, p. 37, scriveva: «Fuori del suo San Giusto, fabbrica disadorna, di una schiettezza primitiva, che porta qualche fiammante mosaico; fuori dalle nere meraviglie del suo Castello, delle nude rovine romane, del bell'arco di Riccardo – che cosa può vantare Trieste? Tutti risponderanno: Nulla. Un'unica eccezione: Silvio Benco. In un suo libretto immaginato come una guida ma scritto come un etereo itinerario attraverso i luoghi e tempi triestini, egli mette bene in luce la rara bellezza, il carattere compatto di tutto un quartiere, quella «Città Nuova» costruita dopo il 1815, che è uno degli esempi più belli ed unitari dello stile neo-classico, dello stile «Impero». E a proposito della peculiarità della cultura triestina, si potrebbe affermare da Benco a Bazlen, precisava: «Essere una cosa ed insieme il suo opposto, questo sembra essere il carattere tipico di Trieste, che sfugge agli osservatori e rimane ignoto a loro stessi, ai triestini. Nel fanno parte una tarda scoperta, quando vedono ritornare dall'editore milanese, dottamente tradotto, il libro che essi da decenni hanno letto nell'originale. Ma di questa loro posizione di punta, d'avanguardia, sembrano non fare nessun caso». Di Spaini, sempre nell'*Autoritratto triestino*, cit., si veda *Silvio Benco*, pp. 131-139. Molti i riferimenti nella critica letteraria e storica al rapporto Benco-Trieste, si vedano tra gli altri: B. Maier, «Trieste» di Silvio Benco, «Il Giornale Nuovo», 7 febbraio 1976; P. Pancrazi, *Silvio Benco*, in Id., *Venti uomini, un satiro e un burattino*, Firenze, Vallecchi, 1923, pp. 25-34, poi in Id., *Scrittori d'oggi*, serie I, Bari, Laterza, 1946, con il titolo *Silvio Benco triestino; Silvio Benco: una testimonianza perenne*, contributi di vari autori pubblicati su «Il Piccolo», 22 novembre 1974, dove si trovano anche riprodotti gli articoli di Benco, *Trieste nel segreto di due crisi europee* (in «Voce libera», 25 maggio 1948) e *Amore della terra* (prefazione alla *Guida dei dintorni di Trieste*, di Nicolò Cobol); G. Stuparich, *Silvio Benco e la sua Trieste*, «Il Giornale dell'Emilia», 10 marzo 1949; Id., *Trieste nei miei ricordi*, Milano, Garzanti, 1948. Sempre tenendo presente il legame tra Benco e Trieste, ma collocandolo in un ambito più vasto cfr. B. Maier, *Contemplazione del disordine*, in *Dizionario letterario Bompiani. Appendice*, 3 voll., Milano, Bompiani, 1964, Vol. I, pp. 203-204; E. Pellegrini, *Aspetti della cultura triestina tra Otto e Novecento*, «Il Ponte», aprile 1980, pp. 354-371, poi anche con il saggio *Silvio Benco critico e scrittore*, in Ead., *La Trieste di carta. Aspetti della letteratura triestina del Novecento*, Bergamo, Pierluigi Lubina, 1987, pp. 13-32 e pp. 111-129.

⁶³ *Pirano* appartiene alle prime prove giovanili di Attilio Tamaro. Il suo legame con la cittadina era dovuto anche alle origini e alla conosciuta famiglia paterna prima del trasferimento a Trieste, dove Attilio nascerà nel 1884 e dove il padre troverà lavoro nell'Arsenale del Lloyd. Con questa

nel 1910 anche in una edizione di lusso a tiratura limitata, e con l'opera su Zara di Antonio Battara. Stampato nel 1911 il libro scritto da Battara aveva la peculiarità bibliografica di contenere una doppia copertina, eguale nella cornice, dove nella prima appare come editore la Libreria M. Quidde già F.H. Schimpff e nella seconda la Libreria Giuseppe Mayländer. Non datata, ma appartenente agli stessi anni, è anche la guida *Führer durch Tiest und Umgebung*, pubblicata in tedesco e adatta per un turista che volesse conoscere anche i dintorni del capoluogo. Gli altri volumi editi in questi anni, tra il 1907 e il 1913, possono apparire, e in parte sono, casuali, tipiche espressioni editoriali di una affermata ma piccola libreria che doveva comunque pescare il consenso alle sue scelte in un contesto locale. Il richiamo allo studio della cultura e della storia regionale era sempre presente, a incominciare dalla traduzione in tedesco delle liriche di Giovanni Pascoli, pubblicate nel 1908 con il titolo *Ausgewählte Gedichte* nella versione di Estella Wondrich, e continuato con i *Canti dell'Istria* di Ada Sestan e con il poema dialettale in vernacolo triestino *La fadiga d'un mortal* di Adolfo Leghissa. Bruno Astori nel 1913 dava alle stampe per Mayländer la raccolta di poesie *In sordina* mettendo in luce e legando la passione civile e l'attenzione per la ricostruzione storica con una vena più intima e appartata⁶⁴ e Francesco Salata proponeva nel 1907 un manuale pratico su *Il diritto elettorale in Austria*. La conferenza *Lo studio scientifico delle classi povere*, tenuta da Alfredo Niceforo al Circolo di studi sociali di Trieste, era stampata anch'essa nel 1907, ma rimaneva l'unico tentativo del libraio editore di convertire in stampa le iniziative culturali di alcune istituzioni cittadine.

opera Tamaro dimostrava di possedere forti interessi per la storia, l'archeologia e l'arte, ponendosi tuttavia in una prospettiva di attivo impegno politico. La laurea conseguita a Graz nel 1906 e il conseguente impiego come bibliotecario e archivist a Pola, presso la Giunta provinciale dell'Istria, venivano superati dal coinvolgimento nell'attività giornalistica, prima all'«Indipendente», poi a «Il Piccolo». A partire dal 1910, anno dell'uscita del volume su Pirano, Tamaro veniva nominato segretario dell'Università popolare di Trieste «dando mostra di un grande attivismo e di un certo talento sul piano propagandistico, qualità che dovevano caratterizzare tutta la sua esistenza». Su questi passaggi cfr. le pagine autobiografiche A. Tamaro, *Pagine autobiografiche inedite*, «La Porta Orientale», vol. 12, 1970, pp. 281-304; G. Quarantotto, *L'amore per l'Istria*, «La Porta Orientale», nn. 9-10, 1954, pp. 415-429; L. Monzali, *Tra irredentismo e fascismo. Attilio Tamaro storico e politico*, «Clio», vol. XXXIII, n. 2, 1997, pp. 267-301. Più in generale sulle opere successive cfr. G. Cervesani, *La «Storia di Trieste di Attilio Tamaro. Genesi e motivazioni di una Storia»*, in A. Tamaro, *Storia di Trieste*, 2 voll., Trieste, LINT, 1976, Vol. I, pp. VII-XLI, poi ripubblicato in G. Cervesani, *Momenti di Storia e problemi di storiografia giuliana*, Udine, Del Bianco, 1993, pp. 107-144; S. Cavazza, G. Trebbi (edd.), *Attilio Tamaro e Fabio Cusin nella storiografia triestina, Atti del Convegno in ricordo di Arduino Agnelli, Trieste, 15-16 ottobre 2005*, Trieste, Deputazione di storia patria per la Venezia Giulia, 2007.

⁶⁴ Per i lavori di storia e politica cfr. B. Astori, *Gorizia nella vita, nella storia, nella sua idealità*, Milano, Treves, 1916; Id., *Il re alla guerra*, Firenze, Bemporad, 1918; Id., B. Coceancig, *I volontari di Trieste e della Venezia Giulia*, Bologna, Cappelli, 1919; G. Stefani, B. Astori, *Il Lloyd triestino: contributo alla storia italiana della navigazione marittima*, Milano, Mondadori, 1938, B. Astori, *La passione di Trieste: diario di vita triestina: luglio 1914-novembre 1918*, Trieste, 1918.

L'attività della libreria a circa dieci anni dall'acquisizione si era comunque rapidamente ampliata grazie anche all'incremento del suo patrimonio commerciale dovuto al rilevamento da parte di Mayländer del consistente fondo della libreria gestita da Julius Dase. Nome illustre a Trieste, Dase possedeva un notevole assortimento di libri antichi e moderni, globi terrestri e celesti, spartiti musicali, ed era noto come piccolo editore per la pubblicazione periodica *L'Almanacco e guida schematica di Trieste*. I problemi di spazio incominciavano a farsi sentire e Mayländer non perdeva l'occasione di trasferire la Libreria Antica e Moderna nei locali al pianterreno del numero civico 30 della stessa via San Nicolò. L'edificio, recente, era stato costruito nel 1906 dall'architetto Arturo Ziffer, apparteneva alla Fraternità israelitica di Misericordia e comprendeva due facciate che davano su via San Nicolò e l'allora via Nuova. In vetrina, dove in qualche occasione venivano esposti quadri di autori diversi, era collocato il ritratto che il pittore Tullio Silvestri aveva dedicato a Mayländer⁶⁵.

Non sono ancora chiari i motivi che spingeranno Mayländer ad abbandonare nel 1919 Trieste per trasferirsi a Bologna. Da poco la libreria si era ingrandita e, se pure di breve durata, l'attività editoriale aveva dato qualche soddisfazione, soprattutto con la vendita del volume di Benco. L'impegno in città era stato ampio e Mayländer non si era risparmiato nel tessere una tela di amicizie dove il rispetto per le idee altrui non era mai venuto meno coniugandosi con una salda e tollerante fede religiosa e con le simpatie verso le battaglie del Partito socialista. Importante, anche se controversa se si rimane alle dichiarazioni dello stesso Mayländer e ai pochi documenti a questo proposito, l'attenzione verso la religione e la sua pratica. Di origine ebraica ma dichiaratosi, come si evince dall'estratto del registro di matrimonio, «senza confessione religiosa», in realtà il libraio editore poteva trarre uno scambio concreto su questo tema dal rapporto con la moglie che aveva aderito alla confessione evangelico-riformata. Sarà probabilmente Flora Edwige Mitzsckerlich a guidare l'educazione delle figlie Eleonora Anna e Gisella Margherita, quest'ultima rimarrà vittima della persecuzione razziale, indirizzandole sin dal battesimo, avvenuto presso la sede della Comunità Evangelica di Trieste, verso una formazione più rigorosa e familiare.

Il cambiamento di sede era forse dovuto da una parte all'occasione offerta dalla Messaggerie italiane di potere ricoprire a Bologna un ruolo più affidabile e sicuro, dall'altro alla opportunità di vendere la libreria a Umberto Saba che, acquistatala in comproprietà con Giorgio Fano, e avvalendosi poi dei consigli di Guido Voghera, ne diveniva unico proprietario il 12 settembre 1919⁶⁶. Il

⁶⁵ Il *Ritratto di Giuseppe Mayländer* è un olio su tela di 82x60 cm. non datato, ma sicuramente eseguito da Silvestri prima del 1919. Sulla figura di Silvestri cfr. oltre a Stefano Aloisi, *Tullio Silvestri: gli anni di Zoppola (1929-1960)*, senza note tipografiche; P. Fasolato, *Tullio Silvestri: (1880-1963)*, presentazione di D. Gioseffi, Trieste, LINT, 1991. Per le notizie su questa fase dell'attività libraria cfr. Bizjak Vinci, Vinci, *La libreria del poeta*, cit., pp. 17-18.

⁶⁶ Sulla nuova vita della Libreria Antica e Moderna si è più volte scritto. Si vedano anche N.

prezzo concordato era 4.000 lire, Mayländer aveva chiesto 5.000, e sicuramente vendita e acquisto si dimostrarono in breve tempo una opportunità e un buon affare per entrambi i contraenti. Per Saba la Libreria Antiquaria diventerà un rifugio, un «antro», ma anche un legame necessario con un minimo di vita attiva⁶⁷, per Mayländer, che l'aveva chiusa durante la guerra affittando un locale alla redazione de «Il Lavoratore» diretto da Giovanni Oliva, la possibilità di perseguire altri progetti. Bologna a questo proposito si rivelava una buona opportunità per non smarrire quel bagaglio di lavoro e conoscenze acquisito nell'apprendistato triestino e, allo stesso tempo, per inserire la nuova attività in un contesto più largo e dinamico, sia per quanto riguardava il capitolo editoriale, sia per quella circolazione del libro che se non faceva del capoluogo felsineo una città importante nel mercato antiquario, poteva incominciare a contare su un pubblico e su un reticolo di librerie, biblioteche, istituzioni, più vasto e competente⁶⁸. Nella frammentarietà di notizie sui primi passi è comunque certo che Mayländer dedicherà le sue energie al nuovo lavoro nelle Messaggerie ma senza dimenticare interessi e passioni. L'occasione per cambiare passo e dare forma concreta ad una svolta si presenterà nel 1924, quando l'editore Arrigo Antonelli che come risulta dal registro della Camera di Commercio aveva denunciato il 13 settembre 1921 l'apertura nello stesso stabile dove abitava di un «commercio di edizioni di libri», dichiarava di avere cessato l'attività⁶⁹. Il documento del 23 luglio 1924 partecipava che nell'esercizio era subentrato Giuseppe Mayländer il quale aveva deciso di mantenere per la ditta lo stesso nome:

Trotta, *Una strana bottega d'antiquario. Una lettera di Saba a Ugo Valli e altre testimonianze dal Fondo Manoscritti dell'Università di Pavia*, e M. Menato, *I cataloghi della Libreria Antiquaria Saba*, in Bizjak Vinci, Vinci, *La libreria del poeta*, cit., pp. 67-80 e pp. 81-88; M. Gatta, *Far schede sui tasti di una vecchia Royal. Umberto Saba libraio antiquario a Trieste*, in M. Gatto, *In viaggio verso Crisopoli. Piccole storie di editori e tipografi*, Campobasso, Palladino, 2003, pp. 173-190. Sulla *Storia di una libreria*, unico scritto di Saba sul suo lavoro di libraio, compreso in raccolte diverse si rimanda alla nota 2 p. 87 dello scritto di Menato, *I cataloghi della Libreria Antiquaria Saba*, cit., e alla recente riedizione U. Saba, *Storia di una libreria*, Milano, Henry Beyle, 2011. Per una migliore comprensione del suo rapporto con il libro e con le istituzioni librerie triestine cfr. U. Saba, *Consigli ai bibliofili e Della Biblioteca civica ovvero della gloria*, ora in U. Saba, *Prose*, a cura di L. Saba, prefazione di G. Piovene, nota critica di A. Marcovecchio, Milano, Mondadori, 1964, pp. 248-250 e pp. 838-843. Nel breve intervento del 1957, *Della Biblioteca civica ovvero della gloria* (cit., p. 248), si rilegga l'inizio: «Mia cara Linuccia, nato nel secolo del dolore (quale fu l'Ottocento), vissuto (ed anche sopravvivo) in quello che ebbe, oltre il dolore, l'angoscia, mi è singolarmente penoso ricordare, sulle soglie della notte, il passato».

⁶⁷ Un cenno a questo passaggio in S. Mattioni, *Storia di Umberto Saba*, Milano, Camunia, 1989, pp. 77-78.

⁶⁸ Non vi è ancora una storia unitaria dell'editoria bolognese nel Novecento. Per alcuni spunti utili ad inquadrare la vicenda Mayländer cfr. G. Tortorelli, *Il torchio e le torri. Editoria e cultura a Bologna dall'Unità al secondo dopoguerra*, Bologna, Pendragon, 2006, e A. Berselli (ed.), *Editoria e Università a Bologna tra Ottocento e Novecento, Atti del Quinto Convegno, Bologna, 26-27 gennaio 1990*, Bologna, Comune di Bologna-Istituto per la Storia di Bologna, 1991.

⁶⁹ Per queste e altre informazioni sulla storia della casa editrice Apollo cfr. Camera di Commercio di Bologna, *Registro Ditte* f. 14006.

Casa editrice Apollo. L'indirizzo, invece, non rimaneva lo stesso cambiando da via Indipendenza 191 a via Fusari 3, durante la gestione Antonelli, a via Santo Stefano 14 e a via Castiglione 13-15 nel subentro fatto da Mayländer. Da questo spostamento di date e di luoghi e da questa sovrapposizione di interessi e lavori si può capire come la casa editrice non avesse una vera e propria struttura, ma si alimentasse della passione del uso proprietario e dei guadagni della libreria che continuerà nel tempo a privilegiare quel reparto antico già presente a abbastanza florido negli anni triestini. A dimostrazione tuttavia di un cambiamento e di una preferenza, che saranno poi riversate nell'attività editoriale, i cataloghi di vendita, almeno quelli sino ad ora recuperati, erano dedicati alla storia dell'arte. Con le consuete condizioni di vendita: «prezzi netti per tutti», spese di invio e imballaggio a carico del committente, pagamento con vaglia postale e spedizione contrassegno per coloro che non erano conosciuti dalla ditta. L'indice dei due cataloghi rintracciati, il primo e il terzo entrambi senza data, era simile ma non identico, suddiviso in tredici sezioni il primo, si partiva con la storia generale e si finiva con la numismatica, ridotto a otto sezioni il secondo che recuperava nell'ultima divisione quel teatro e musica precedentemente inserito come appendice.

Nell'insieme il terzo catalogo risultava più povero. Se è vero che alcune sezioni venivano accorpate, ad esempio storia generale con le riviste, gli opuscoli, l'estetica e la teoria, oppure la numismatica con l'archeologia, non comparivano la topografia, l'architettura, la bibliografia con le arti grafiche e le riproduzioni di codici, la ceramica con l'arte decorativa, i mobili e le arti tessili, l'araldica, la tecnica della pittura e delle arti minori. Qualche cosa di più sulle giacenze e sulle richieste del pubblico si sarebbe potuto conoscere dal secondo catalogo edito dalla libreria antiquaria e dedicato alla storia d'Italia, ma le ricerche sono state infruttuose e si sono esaurite nel ritrovamento solo dell'indicazione della sua esistenza in un inserto pubblicitario. Quando poi si può datare l'inizio dell'attività editoriale avviata da Mayländer a Bologna non è così semplice capire. Se il passaggio di consegne definitivo tra Arrigo Antonelli e Giuseppe Mayländer risulta il 1924, è anche vero che prima di quella data, più esattamente a partire dal 1921, la casa editrice pubblicava alcuni volumi che sembravano fortemente influenzati dai gusti di Mayländer. In pochi casi anche pubblicazioni senza data ma collocabili quasi certamente tra il 1922 e il 1923. Pensiamo all'antologia *L'aurora della poesia italiana*, che presentava autori del Duecento e Trecento in una veste spoglia senza commenti e introduzione, o alle sessanta riproduzioni di quadri e disegni raccolti in *Donne belle*. In questo caso la prefazione di Silvio Benco rimandava ai legami di conoscenza e di amicizia con il libraio triestino⁷⁰. Se dovessimo comunque ricercare in questo esordio un

⁷⁰ Nella prefazione Benco precisava come gli esempi non fossero stati scelti da lui, «anzi mi son limitato a eliminarne alcuni, nei quali la lezione era troppo difficile, essendosi la bellezza troppo recondita o troppo intimamente congiunta con l'apprezzamento dell'arte». Poiché queste

filo conduttore, tenendo sempre conto che stiamo parlando di una produzione risicata di uno o due libri l'anno, lo ritroveremmo nel solo interesse costante, quello per la storia dell'arte. Accanto a *Donne belle* venivano pubblicati nel 1923 le *Delizie galanti di incisori francesi nel Settecento* di Giorgio Nicodemi e, con una prefazione di Charles Wulzinger, *Vieilles faïences turques. Asie Mineure et à Constantinople* di Alexandre Raymond. Due anni prima erano state riprodotte le 92 tavole che Sandro Botticelli aveva dedicato alla *Divina Commedia*. L'edizione stampata in 300 copie numerate veniva accolta favorevolmente dalla critica, ne parlava sul «Corriere della Sera» Ugo Ojetti, e si avvaleva della curatela di Iginio Benvenuto Supino che firmava anche la prefazione. Più che per un rapporto continuo e duraturo tra Supino e la nuova casa editrice, negli anni successivi la Apollo farà altre scelte legandosi a protagonisti diversi nel campo della storia dell'arte, il volume su Botticelli era importante perché sembrava chiudere quella stagione di studi e scoperte avviata da Supino anni prima. Una fedeltà iniziata con la monografia edita dai Fratelli Alinari e da Seeber nel 1900 e proseguita nel 1909 con l'agile volumetto, più volte ristampato, *Sandro Botticelli* inserito da Formiggini nella collana *Profili*⁷¹. Per altro verso la curatela e la presentazione di Supino cadevano anche in un momento di grande fervore e intensità nel rapporto tra lo studioso e Bologna, dove non solo si ritrovava il grande contributo dato alla valorizzazione delle istituzioni pubbliche e private⁷², ma anche una presenza costante della sua produzione scientifica nei

donne erano presentate come opere d'arte «chi ne parla potrebbe essere tentato facilmente a farne una dissertazione di meriti artistici», ma per Benco non poteva essere questo l'assunto del testo e certo «non con tale proposito lo presceglie il compratore, di cui si suppone non voglia tanto essere informato dei meriti propri a vari maestri, quanto istruito su le qualità della bellezza». Per quanto riguardava la sensibilità degli artisti non bisognava fare «riferimento soltanto al rappresentare, ma anche al modo di intendere; ché si rappresenta quanto si intende», come per altro non esistevano soltanto bellezze ideali o carnali ma «anche bellezze idealisticamente concepite ed altre evocate sotto il controllo dell'osservazione idealistica». Il mutare delle tecniche e delle rappresentazioni nei ritratti, concludeva Benco, altro non poterono essere per il lettore contemporaneo che un insegnamento «non del transito irreparabile di ogni creatura bella e mortale, sé della molteplice attenzione che debbano porre i nostri sensi nel discernere e comprendere la bellezza delle varie donne viventi, non sempre aperta e celebrata, ma spesso recondita e misteriosa».

⁷¹ I.B. Supino, *Sandro Botticelli*, Firenze, Fratelli Alinari-B. Seeber, 1900; Id., *Sandro Botticelli*, Bologna-Modena, A.F. Formiggini, 1909. Il volumetto inaugurava la collana *Profili* dell'editore Formiggini e aveva una certa fortuna con altre tre edizioni nel 1910, nel 1911 e nel 1924. Scrivendo all'editore Supino precisava (la lettera è del 3 dicembre 1908): «Io non posso ripetere nel volume suo quello che conteneva l'edizione Alinari, anche perché ho formalmente promesso che avrei fatto un breve riassunto; se il volumetto verrà magro anziché no non sarà mia colpa, ma dei caratteri elzeviriani troppo piccoli». Una lettera successiva, del 14 gennaio 1909, si faceva carico della delusione dell'editore davanti al prodotto finito: «Mi spiace ella dica che il mio Botticelli è poco profilo». Sulle edizioni del Botticelli formigginiano cfr. E. Mattioli, A. Serra, *Annali delle Edizioni Formiggini (1908-1938)*, Modena, S.T.E.M.-Mucchi, 1980, pp. 16-17, 26, 45, 228.

⁷² Supino fu ispettore dei monumenti di Bologna e dal 1906, data da considerare come spartiacque di un più profondo cambiamento, vincitore del concorso per la docenza straordinaria in Storia dell'Arte presso l'università felsinea. In questo ambito, già dall'insediamento, Supino si discosterà sia dall'impostazione del suo predecessore, Enrico Panzacchi, sia dalle posizioni di

cataloghi di case editrici grandi e piccole⁷³. Del resto il Botticelli di Supino sia nella più lontana monografia, sia in questa rapida presentazione ai disegni per la *Divina Commedia* continuava a sostenere una peculiare linea di raccordo tra posizioni anche distanti della critica sino a trovarsi arruolato, non sappiamo con quanto gradimento dell'autore, in possibili battaglie avanguardistiche e di rottura⁷⁴. Quando tuttavia nel 1926 l'editore Apollo manderà in stampa la

Alfonso Rubiani (su cui si veda la sua commemorazione *Alfonso Rubiani*, «Atti e Memorie della Regia Deputazione di Storia patria per le Romagne», IV serie, vol. III, 1914, p. 31). L'attesa nomina a professore ordinario in Storia dell'arte medioevale e moderna arriverà solo nel 1914, mentre nel 1919 sarà presidente della Commissione provinciale per la consultazione dei documenti e nel 1920 preside della Facoltà di Lettere e Filologia. Carica che manterrà sino al 1923 quando entrerà a far parte della Commissione permanente della Biblioteca Universitaria ricoprendo poi il ruolo di direttore dello stabilimento di Storia dell'arte medioevale e moderna. Nel 1928 Supino diventava direttore del Museo d'arte industriale di Bologna e successivamente presidente del Collegio docenti dell'Accademia di Belle Arti e del Liceo artistico della città. Per queste e altra notizie cfr. I. Cristallini, *Igino Benvenuto Supino. Nota biografica e storica* e A. M. Matteucci Armandi, *Igino Benvenuto Supino a Bologna*, in P. Bassani Pacht (ed.), *Igino Benvenuto Supino 1858-1940. Omaggio a un padre fondatore*, Firenze, Edizioni Polistampa, 2006, pp. 27-45 e pp. 81-92.

⁷³ Un elenco delle pubblicazioni di Supino nella *Bibliografia* che precede la *Miscellanea di Storia dell'arte in onore di Igino Benvenuto Supino*, a cura della «Rivista d'Arte», Firenze, Leo S. Olschki, 1933, pp. VI-XI, dove peraltro non sono indicate nelle schede le case editrici delle monografie. Tra i contributi della miscellanea compaiono anche lavori di Giuseppe Fiocco, Wart Arslan, Nello Tarchiani, Federigo Hermanin già collaboratori della Apollo. Per una bibliografia più completa e meglio curata cfr. ora I. Cristallini, *Gli scritti di Igino Benvenuto Supino. Elenco cronologico*, in Bassani Pacht (ed.), *Igino Benvenuto Supino 1858-1940*, cit., pp. 39-45. Con le riviste, le tipografie e le case editrici bolognesi Supino ebbe una lunga e ampia consuetudine, collaborando con «L'Archiginnasio», «Memorie della R. Accademia delle Scienze dell'Istituto di Bologna», «Atti e Memorie della R. Deputazione di Storia Patria per le Romagne», «Il Comune di Bologna», «Strenna storica bolognese», «Annuario della R. Università di Bologna», e poi oltre che con la Apollo, anche con la Cooperativa Tipografica Mareggiani, la Cooperativa Tipografica Azzoguidi, la Tipografia Negri, e soprattutto la casa editrice Zanichelli, a cui darà sin dal 1909 e 1910 i volumi *L'architettura sacra in Bologna nei secoli XIII e XIV* e *La scultura in Bologna nel secolo XV. Ricerche e studi*. Gli altri due importanti lavori usciti con Zanichelli, *L'arte nelle chiese di Bologna. Secoli VIII-XIV* e *L'arte nelle chiese di Bologna. Secoli XV-XVI*, editi nel 1936 e nel 1938, verranno poi riproposti da Forni in edizione anastatica nel 1990. Per la presenza di Supino nel catalogo Zanichelli si consulti *Le edizioni Zanichelli 1859-1939*, Bologna, Zanichelli, 1984.

⁷⁴ A questo proposito andrebbe approfondito in particolare il suo rapporto con «Il Marzocco» dove Supino scrisse, ma soprattutto dove continuarono ad essere recensiti i suoi lavori soprattutto ad opera di Nello Tarchiani, altro autore della Apollo, cfr. C. Rotondi (ed.), *Il Marzocco (Firenze 1896-1932). Indici*, 2 voll., Firenze, Leo S. Olschki, 1980. A proposito di forzature e fraintendimenti si legga la recensione di Angelo Conti alla monografia su Botticelli (A. Conti, *Un libro su Botticelli*, «Il Marzocco», vol. V, n. 11, 1900, p. 3) dove professando una «confessione estetizzante», con la quale «non pare proprio che Supino avesse mai civettato», l'autore parlava di Botticelli come il «pittorico musagete della reazione idealistica contro il verismo letterario», concludendo che «non è soltanto [il libro su Botticelli] un notevole contributo alla erudizione e alla coltura artistica del nostro tempo, ma è un'opera che gioverà efficacemente a rendere più sincera e più aderente la religione dell'arte». La recensione di Conti è ricordata anche in M. Ferretti, *Igino Benvenuto Supino: frammenti di uno specchio*, in Bassani Pacht (ed.), *Igino Benvenuto Supino 1858-1940*, cit., pp. 47-58. Il saggio di Ferretti lo si ritrova anche, senza variazioni in D. Mirri, S. Arienti (edd.), *La cattedra negata. Dal giuramento di fedeltà al fascismo alle leggi razziali nell'Università*

monografia dedicata a Jacopo della Quercia il vento era sicuramente cambiato e quella felice combinazione, per cui a Supino erano sicuramente addebitate grandi competenze e conoscenze nella gestione del patrimonio artistico inserite in una trama filologica erudita capace di vagliare e sostenere la ricerca alla luce di un'analisi minuziosa⁷⁵, trovava ora una accoglienza incerta se non, in alcuni studiosi, anche ostile.

Se Supino condivideva l'orientamento metodologico, documentario, erudito, proprio della scuola storica che trovava nel modello di Adolfo Venturi una proposta valida e fattiva, un punto di riferimento per ricontestualizzare la situazione artistica italiana, per Supino risultava più difficile dialogare con la nuova generazione entrata in scena negli ultimi anni del suo insegnamento. Una generazione che opponeva oramai radicalmente Croce e D'Annunzio e che non rinunciava ad esprimere giudizi di valore dovuti a un'opera d'arte. Giovani studiosi, molti dei quali allievi di Venturi alla Scuola di specializzazione di Roma, per i quali gli anziani maestri erano relegati al ruolo di «lavoratori»⁷⁶. In questa prospettiva, dove convergevano in alcuni una netta frattura, in altri un distante rispetto, il lavoro di Supino uscito da Apollo veniva guardato come un magnifico edificio senza anima, tanto da provare delusione a lettura finita⁷⁷.

di Bologna, Bologna, Clueb, 2002, pp. 51-61 e in D. Lenzi (ed.), *Arti a confronto. Studi in onore di Titti Matteucci*, Bologna, Compositori, 2004, pp. 156-167. Erroneamente nel saggio di Ferretti si data (p. 56, n. 26) il Sandro Botticelli nell'edizione Alinari-Seeber 1896 anziché 1900.

⁷⁵ Per i rapporti tra Supino e l'ambiente culturale del suo tempo, oltre ai ricordi di R. Buscaroli, *Ricordo di Iginio Benvenuto Supino*, «Atti e memorie della Accademia Clementina di Bologna», vol. V, 1953, pp. 41-48, poi con lo stesso titolo in opuscolo, Bologna, Tipografia Galavotti, 1953, cfr. anche P. Bassani Pacht, *Iginio Benvenuto Supino, un artista da scoprire*; V. Supino, *Iginio Benvenuto Supino visto dagli artisti del suo tempo*; G. Maino, *Iginio Benvenuto Supino nella cultura del suo tempo*; G.C. Sciolla, *Iginio Benvenuto Supino e la storiografia artistica in Italia tra Ottocento e Novecento*, tutti in Bassani Pacht (ed.), *Iginio Benvenuto Supino 1858-1940*, cit., pp. 70-80, 93-120, 121-158, 215-229.

⁷⁶ A questo proposito va citato il misurato e acuto giudizio di Mary Pittaluga, allieva di Venturi, che nella rassegna *Arti e studi in Italia nel 900. Gli storici dell'arte*, «La Nuova Italia», nn. 10-11, 1930, p. 4 isolando i nomi di Venturi, Supino e Corrado Ricci li faceva precedere da questo incipit: «Agli inizi del secolo il campo degli studi di storia dell'arte è dominato da alcune persone che serbano ancora le abitudini mentali della seconda metà dell'Ottocento». E a proposito del metodo e dei risultati di Supino: «per lui, più che per altri, l'indirizzo rigorosamente documentario trova oggi in Italia un degno rappresentante», capace di indagare la verità «anche in que' documenti stilistici, che ogni opera d'arte cela in sé, per coloro che li sanno leggere».

⁷⁷ L'occasione per misurare la distanza dal lavoro di Supino si presenterà nel 1934 con la pubblicazione della monografia di Giusta Nicco, *Jacopo della Quercia*. A pagina 8 si trova questa citazione: «In Italia prima dell'opera del Supino e dei recentissimi studi di Péleo Bacci nessuno s'era mai occupato [di Jacopo della Quercia], in particolare [...] chi sfoglia l'elegante pubblicazione del Supino, splendidamente curata e ricca di belle fotografie [...] trova bensì studiate a fondo tutte le questioni storiche che concernono l'attività di Jacopo, ma, si sente [...] quasi deluso, come che sia davanti ad un bel palazzo di cui travisa l'intera magnificenza e non vi possa entrare. Poiché l'Autore è stato uno studioso diligente, più che un interprete appassionato, il lettore sente che l'anima dell'artista gli sfugge».

Accanto a queste proposte disomogenee va citata anche la traduzione del *Diario di Satana* di Leonid Nikolaevič Andreev. Pubblicata da Apollo nel 1922 l'opera di Andreev si inseriva in una lunga scia di lavori che saranno riproposti per alcuni decenni in numerose versioni e da diverse case editrici italiane. Anche in questo caso non siamo a conoscenza dei canali attraverso cui era stata acquisita, ma è molto probabile che Mayländer avesse voluto trarre qualche beneficio economico dalla fortuna di un autore vicino alle sue istanze di libertà e giustizia⁷⁸. Volumi di questo genere, slegati da un preciso indirizzo

⁷⁸ Dalla pubblicazione del racconto *Il pensiero*, apparso sulla «Nuova Antologia» nel 1904, alla traduzione quasi integrale delle opere teatrali per la casa editrice Sonzogno, Andreev godette sino agli anni Trenta di una grande fortuna attirando l'attenzione dei critici e traduttori illustri: da Borgese a Provenzal, Tilgher, Gobetti, Rebor. L'elenco, sino al 1982, delle traduzioni e dei saggi critici sono riportati in R. Giuliani, *La fortuna di Leonid Andreev in Italia*, «Europa Orientalis», n. 1, 1982, pp. 45-52. Un discorso a parte merita la posizione di Piero Gobetti che di Andreev fu sia critico che traduttore: nel 1919 da Sonzogno apparve *Figlio dell'uomo e altre novelle*, tradotte direttamente dal russo da Piero Gobetti e Ada Prosperi, con uno studio critico sull'autore, nel 1921 da Taddei & Figli fu la volta di *Savve. Ignis sonat*, dramma in quattro atti prima traduzione italiana dal russo di Piero Gobetti e Ada Prosperi. Gli interventi di Gobetti sullo scrittore russo risentivano fortemente di una vis polemica contro la critica e le traduzioni del tempo. In *Leonida Andreev in Italia*, apparso nella rubrica *Letteratura straniera in Italia* di «Energie Nuove», 30 settembre 1919, Gobetti difendeva ed esaltava la traduzione di Clemente Rebor di *Lazzaro e altre novelle* edito da Vallecchi parlando di «capolavoro» per la «serietà e finezza d'arte» di cui, peraltro, «noi in Italia non siamo abituati». L'articolo poi proseguiva attaccando soprattutto l'interpretazione riduttiva della poetica di Andreev offerta da Borgese «in due articoletti che rappresentano proprio la convinzione opposta alla mia». Il tono polemico contro gli articoli di Borgese era presente anche nella prefazione al *Figlio dell'uomo* che a sua volta era una ampia rielaborazione di uno scritto apparso su «L'ascesa», I, dicembre 1919, 8. L'articolo iniziava con questo breve paragrafo, poi omissso nella rielaborazione per il saggio: «La morte di Leonida Andreev ha mosso lo stuolo dei critici dei nostri quotidiani a promuovere nell'articolo commemorativo la loro superficialità e incompetenza. Così come la fama dello scrittore vivente era stata sfruttata dalla meschina incoscienza dei traduttori...traditori». Questi lavori di Gobetti su Andreev insieme alla prefazione alla traduzione di *Savva*, sono stati poi riuniti in P. Gobetti, *Paradosso dello spirito russo e altri scritti sulla letteratura russa*, introduzione di Vittorio Strada, Torino, Einaudi, 1976, pp. 57-80. Nell'introduzione Strada accenna, nel testo e in nota (p. XIX), alla lettura di Andreev fatta da Gobetti: «e ci sorprenderemo del riconoscimento spropositato che Gobetti riserva ad Andreev, uno scrittore che a suo tempo fu troppo famoso così come oggi, al contrario, è troppo dimenticato. Il *Paradosso* se non manca di simili illuminazioni, non è scarso di simili abbagli». E in nota: «Leonid Andreev pone un rilevante problema di storia del gusto letterario poiché la sua fama, al principio del secolo, fu grande sia in Russia sia nell'Europa occidentale. Gobetti, tuttavia, sopravvalutò Andreev, al punto di anteporlo a ben più autentici scrittori come Čechov, e Gorki, assai più per motivi inerenti alla sua concezione della natura dell'*intelligencija* che per una partecipazione indifferenziata a un interesse allora comune e diffuso». Secondo Strada la sopravvalutazione e le forzature operate da Andreev erano dovute alla constatazione che «forse meglio di ogni altro scrittore russo del tempo, e certo in forma più facilmente manifesta, Andreev serviva a concludere quella traiettoria dell'*intelligencija* che Gobetti aveva tracciato senza titubanza». Per un inquadramento del *Diario di Satana* nella produzione di Andreev cfr. l'introduzione di Daniela Rizzi a L. N. Andreev, *Diario di Satana*, Pordenone, Edizioni Studio Tesi, 1991, pp. IX-XXXI. Si vedano anche R. Davies, *Leonid Andreev: album di famiglia. Ritratti inediti della Russia prerivoluzionaria*, introduzione di O. Andreev Carlisle, Milano, Mondadori, 1989; R. Davies, *Leonid Andreev (1871-1919)*, in *Storia della letteratura russa*, Vol. 3, t. I: *Il Novecento. Dal decadentismo all'avanguardia*, Torino, Einaudi,

editoriale, si susseguirono negli anni successivi e piuttosto che rappresentare scelte oculate dimostravano una qualche capacità di Mayländer di proporre autori e titoli comunque in sintonia con i tempi. Pensiamo nel 1925 alla ristampa in 600 copie dell'edizione Sommaruga del *Canto novo* di D'Annunzio e, nello stesso anno, a *Le memorie di carnefici di Parigi 1685-1847* di Clément Henri Sanson⁷⁹, o ancora al fortunato volumetto *Somaropoli*, di Ostilio Lucarini con le illustrazioni di Alessandro Cervellati, del quale si riuscirono a vendere alcune copie anche alle scuole⁸⁰. Nel 1926 vi era stato il recupero di Delia de Zuccoli, ma il suo vero nome era Adelia Zuccoli, una poetessa e scrittrice che Silvio Benco aveva sposato nel 1904 dopo averla conosciuta nell'ambiente del giornale «Indipendente». Intellettuale sensibile e attenta con una produzione certo non ampia, anche a causa di continui ripensamenti e titubanze, Delia Benco pubblicava con Apollo *Creature* che usciva con la prefazione del marito. Lo stesso Benco accennava al difficile rapporto della moglie con la scrittura,

1989, pp. 441-452, e per un discorso più ampio nello stesso volume, si vedano M. Heller, *La letteratura della prima guerra mondiale*, pp. 724-731 e A. Timarcenko, *La drammaturgia e il teatro all'inizio del secolo*, pp. 389-439. Per i rapporti di Andreev con Andrej Belyi e il simbolismo russo cfr.: L. Andreev, *Spettri*, a cura di D. Morante, con uno scritto di Andrej Belyi, Roma, Biblioteca del Vascello, 1992; A. Belyi, *Gli spettri del caos. Simboli e simbolismi russi*, a cura di R. Casari, U. Persi, Milano, Guerini e Associati, 1989; D. Rizzi, *La rifrazione del simbolo. Teorie del teatro nel simbolismo russo*, Padova, Edizioni GB, 1989; *Andrej Belyi pro e contra*, Atti del I° Simposio Internazionale Andrej Belyi, Bergamo-Istituto Universitario, 14-16 settembre 1984, a cura della Sezione di Slavistica dell'Istituto Universitario di Bergamo, Milano, Unicopli, 1986.

⁷⁹ C.H. Sanson, *Le memorie dei carnefici di Parigi: 1685-1847*, Bologna, Apollo, 1925. La corposa edizione Apollo, 410 pagine, era la prima traduzione in lingua italiana delle memorie di Clément Henri Sanson, ultimo rappresentante di una famosa famiglia tristemente famosa per aver esercitato per generazioni la professione del boia. Il volume sarà poi riproposto nel 1989 dalle Messaggerie Pontremolesi con l'aggiunta di un sottotitolo, *Le memorie dei carnefici di Parigi. Un secolo e mezzo di esecuzioni capitali: 1685-1847*, e l'eliminazione di 8 pagine iniziali presenti nell'edizione Apollo. Sia l'edizione originale, sia quella delle Messaggerie Pontremolesi non riportano il nome del traduttore.

⁸⁰ O. Lucarini, *Somaropoli. La storia di un circo e di tanti altri*, illustrazioni di Alessandro Cervellati, Bologna, Apollo, 1925. Alcuni anni dopo, nel 1934, il volume veniva proposto dall'autore all'Ufficio Istruzione del Comune di Bologna che ne acquistava con un forte sconto 26 copie per darle in dotazione alle 13 direzioni didattiche delle scuole elementari. Somaropoli sarà poi ristampata nel 1945 dal Poligrafico «Il Resto del Carlino» e nel 1950 dalla casa editrice Mediterranea di Roma. Lucarini sarà un autore abbastanza prolifico pubblicando anche libri di orientamento dichiaratamente fascista: *I campanelli del giullare*, Bologna, Cappelli, 1927; *La sagra dei ricordi e altre pagine sentimentali*, Bologna, Cappelli, 1918; *Racconti della Bibbia ai fanciulli e al popolo*, Milano, Mondadori, 1924; *L'anima del vento. Poesie*, Bologna, Zanichelli, 1919; *Italo Saltarelli: il balilla senza paura*, Bologna, Cappelli, 1939; *Cantata mussoliniana*, Bologna, Cappelli, 1938: Su Lucarini cfr. R. Graziani, *Ostilio Lucarini*, prefazione di Gustavo Valente, Castrovillari (Cs), Grafica Pollini, 1993. Nel 1927 Apollo pubblicava anche una scelta delle fiabe dei fratelli Grimm con annotazioni e note di Lorenzo Bianchi: Brüder Grimm, *Kinder und Hausmärchen*, l'edizione era stampata dalla Tipografia del Lloyd di Trieste e dedicata «all'amico Eugen Fehrle filologo e folklorista egregio con affetto fraterno». Il volume sarà ristampato da Zanichelli nel 1939. Anche se inserita nel repertorio TESEO '900, cit., pp. 25-26, questa risicata produzione di libri per l'infanzia non può indurre a considerare Apollo, come correttamente sottolinea Mirella D'Ascenzo estensore della scheda, una casa editrice scolastico-educativa.

«ella ha scritto sempre, ed ha scritto poco nella sua vita», sottolineando come avesse «sempre dovuto combattere con sé stessa per appurare la visione che era così chiara e così densa di vita nel suo spirito d'artista». Dapprima, sottolineava Benco, si era illusa come tutti i giovani «che tutto fosse una questione di forma», tentando «di risolvere il problema alla superficie», ma ben presto aveva accolto «l'irrompente un po' tumultuosa freschezza con cui le sensazioni si sprigionavano dalla sua personalità». Un lavoro lungo e faticoso, pieno di «scatti» e di «intime irrequietudini» che avrebbe trovato una sua relativa calma «passando dalla immediata parola alla riposata pagina». La ripresa della scrittura era quindi avvenuta attraverso un passaggio, un avvicinamento a una vena più intima, più realistica, più umile contrassegnata dalle esperienze della vita e della guerra⁸¹. Anche le traduzioni dei *Racconti crudeli* di Auguste de Villiers de l'Isle-Adam e del pamphlet di Jonathan Swift, *L'arte di derubare i padroni. Consigli ai domestici d'ambo i sessi*, presentavano per la prima volta in Italia opere che contribuirono a fare conoscere meglio due autori in quegli anni non sempre al centro dell'attenzione critica⁸². Gabriele Faure, Lev Tolstoj, Anton Čechov, Honoré de Balzac, completavano poi le proposte di autori stranieri⁸³.

⁸¹ D. Benco, *Creature*, Bologna, Apollo, 1926, la prefazione di Benco non è segnalata sul frontespizio. Delia Zuccoli Benco ricevette comunque anche una certa attenzione dalla critica, cfr. ad esempio, P. Pancrazi, *Romanzo di Delia Benco*, in Id., *Scrittori d'oggi*, Roma-Bari, Laterza, 1946, serie IV, pp. 170-177. Per i rapporti con altri intellettuali del suo tempo, da Aldo Palazzeschi a Gianna Manzini e Gian Stuparich si vedano alcune schede in Pertici (ed.), *Intellettuali di frontiera. Triestini a Firenze (1900-1945)*, cit., pp. 108 e pp. 191-192. Un racconto di Delia Benco, *Il cuore*, era anche apparso su «Il Palvese», 14 luglio 1907.

⁸² Entrambi i volumi possono essere indicativi, anche se non sappiamo in che modo sia arrivato l'interesse per la pubblicazione, delle preferenze letterarie di Giuseppe Mayländer. Villiers de l'Isle Adam per «la sua attività letteraria, improntata a un idealismo metafisico e dominata dal pessimismo e dal gusto del mistero assolutamente controcorrente rispetto al positivismo allora dominante» – non dimentichiamo che la sua opera verrà definita «una geniale sintesi della esperienza decadente e di quella simbolista e in un certo senso una anticipazione del simbolismo» –, Jonathan Swift, come recitava un annuncio della casa editrice, per essere «l'immortale umorista irlandese» che con «l'ultima sghignazzata sulle delusioni della sua tormentata esistenza» imprimeva con «l'originalità degli argomenti» e «l'amara ironia», un segno profondo nella letteratura inglese. Dell'opera di Villiers de l'Isle-Adam, dopo la versione fattane nel 1927 da Francesco Galli per Apollo, seguirono: *Storie inedite e racconti crudeli*, a cura di C. Sbarbaro, Milano, Bompiani, 1945; *Racconti crudeli*, traduzione di Franca Uffreduzzi, introduzione di Gianni Nicoletti, Torino, UTET, 1968, *Racconti crudeli*, a cura di Gloria De Antoni e Loredana Scaramella, Roma, Savelli, 1980; *Racconti crudeli*, traduzione di Goffredo Foretto, Genova, ECIG, 1986; *Racconti crudeli* a cura di Maurizio Cucchi, introduzione di Mario Luzi, Roma, Editori Riuniti, 1987. Per una lettura e inquadramento dell'opera di Villiers de l'Isle-Adam, di poco precedente alla traduzione proposta da Apollo, cfr. l'introduzione di Pierangelo Baratonò a *Tribolato Bonomo*, Milano, Casa editrice «Milano», 1923.

⁸³ G. Faure, *L'amore sotto gli oleandri*, romanzo contemporaneo, Bologna, Apollo, 1928. Per le delicate storie d'amore e, soprattutto, l'interesse dimostrato verso l'Italia, Faure godette in quegli anni di una certa notorietà, cfr. le traduzioni di: *Paesaggi letterari*, traduzione di Beatrice Rava Corinaldi, Firenze, R. Bemporad, 1918; *Ore appassionate da Tauman a Padova*, traduzione della contessa Maria Isoardi Savardo, Bari, Società Editrice Tipografica, 1928; *Amori romantici*, traduzione di Beatrice Ravà Corinaldi, Bologna, Cappelli, 1928; *Pagine vicentine*, versione di Adolfo

Al di là di pochi contributi letterari⁸⁴, la parte saggistica risulta più aderente ai tumultuosi anni di cambiamento che vedevano l'Apollo operare a Bologna. Paolo Orano, Mario Missiroli, Giorgio Pitacco, Guido de' Pazzi continuavano nei loro libri una riflessione in presa diretta su una nazione dove la crisi dello Stato liberale aveva favorito l'ascesa del fascismo⁸⁵.

Giuriato, Vicenza, G. Perosato, 1933; *Autunno*, introduzione e traduzione di Nicola Cacudi, Bari, Società Editrice Tipografica, 1935. Indicazioni sulle opere di Anton Čechov, *Novelle umoristiche*, traduzione dal testo russo di Olga Malavati Arpshofen, studio critico di Adriano Tilgher e *Racconti agrodolci*; L. Tolstoj, *Le ultime novelle e altri scritti*, opere postume tradotte da Luigi Grillo e Boris Gurevich; H. de Balzac, *Il salotto dei sorpassati*; del poeta indiano Manas Atma, *Una squilla è nel cuore*, sono state rintracciate in un catalogo, senza data, della Apollo, ma non è stata trovata copia nelle biblioteche.

⁸⁴ S. Basilea, *L'opera di Giacinto Gallina nel teatro italiano*, con un breve epistolario inedito del poeta, introduzione di Alfredo Galletti, Bologna, Apollo, 1931. L'opera, senza variazioni, verrà poi ripubblicata nel 1936 da Zanichelli. C. di San Lazzaro, *Versi*, Bologna, Apollo, 1932. Il volumetto, la copia custodita presso l'Archiginnasio porta la dedica dell'autrice come «omaggio devoto» ad Albano Sorbelli, era considerato una prima promettente prova, anche se «con qualche asprezza e qualche trascuratezza» sottolineava una recensione siglata F.B. sulla «Rassegna nazionale», aprile 1933, pp. 312-313, di una giovane Clementina di San Lazzaro allora studentessa presso l'Università di Bologna. Laureatasi con una tesi su Gerhart Hauptmann, a cui era stato assegnato il premio Vittorio Emanuele II per essere poi pubblicata da Cappelli nel 1934 con il titolo *Gerhart Hauptmann e i suoi drammi*, di San Lazzaro vincerà la cattedra in Lingua e letteratura tedesca alla Statale di Milano. Rimarrà legata per molto tempo agli editori e tipografi dell'Emilia Romagna, con i quali pubblicò: *Goethe a Bologna*, Bologna, Azzoguidi, 1931; *Conrad Ferdinand Mayer e l'Italia*, Bologna, Azzoguidi, 1932; *La lirica di C.F. Mayer*, Modena, Società Tipografica Modenese, 1938; *Stefan George*, Imola, Coop. Tip. Editrice "Paolo Galeati", 1935, il volume era dedicato a Arturo Farinelli, la copia presente presso l'Archiginnasio di Bologna era indirizzata personalmente quale «memore omaggio» a Giuseppe Saitta; *L'anima tedesca*, con prefazione di Vincenzo Errante, Modena, Società Tipografica Modenese, 1942; e nel secondo dopoguerra si vedano le curatele, de *I Minnesänger*, insieme a Gianna Murri, Torino, UTET, 1947 (nella collana *I grandi scrittori stranieri* diretta da Arturo Farinelli), e *Lutero*, Milano, Garzanti, 1948 (nella collana diretta da Vincenzo Errante e Fernando Palazzi, *Scrittori stranieri*). L'interesse per la poesia continuerà con una seconda raccolta: *Liriche*, Modena, Società Tipografica Modenese, 1938. Notizie stringate e non sempre precise sulla di San Lazzaro in *Enciclopedia biografica e bibliografica "italiana"*, serie VI: *Poetesse e scrittrici*, a cura di M. Bandini Buti, Roma, Istituto Editoriale Italiano Bernardo Carlo Tosi, 1941, p. 232, e M. Gastaldi, C. Scano, *Dizionario delle scrittrici italiane contemporanee (arte, lettere, scienze)*, Milano, Gastaldi, 1961, p. 78. Per un confronto con una impostazione diversa sulla letteratura tedesca cfr. L. Mazzucchetti, *Il nuovo secolo della poesia tedesca*, Bologna, Zanichelli, 1926; Ead., *Goethe e il cenacolo di Leonardo*, Milano, Hoepli, 1939.

⁸⁵ Guido de' Pazzi, *La crisi d'oggi*, Bologna, Apollo, 1925 la copia conservata presso l'Archiginnasio di Bologna porta la dedica personale a Giuseppe Saitta; P. Orano, *Lode al mio tempo 1895-1925*, Bologna, Apollo, 1926; Id., *La rinascita dell'anima*, Bologna, Apollo, 1926, la prima edizione era datata Bari, Humanitas, 1914 (anche se più volte segnalata non siamo riusciti a rintracciare la copia edita da Apollo); M. Missiroli, *La giustizia sociale nella politica monetaria di Mussolini*, Bologna, Apollo, 1928; G. Pitacco, *La passione adriatica nei ricordi di un irredentista*, Bologna, Apollo, 1928. Pitacco, introducendo il suo libro, parlava di «ricordi schematici, spesso di piccoli fatti», ma tuttavia «non senza interesse per quei nostri conterranei, che, rimasti durante la guerra in servitù, non ebbero la ventura di partecipare all'azione». Prove «che dimostrano come gli irredenti, nella loro maggioranza, avessero intuito e avvisato i pericoli della politica d'incomprensione e di debolezza che portò alle dannose e dolorose rinunce, e come, e con quale vigore di argomenti e di sentimenti, essi avessero cercato di opporvisi».

Nel 1925 e nel 1928, a dimostrazione di come Mayländer seguisse anche le profonde trasformazioni economiche e scientifiche che stavano rifondando in campo internazionale il rapporto tra uomo e macchina, la casa editrice bolognese pubblicava due libri significativi ed editorialmente fortunati. *La mia vita e la mia opera*, scritto da Henry Ford in collaborazione con Samuel Crowther e tradotto con l'autorizzazione dell'autore da Silvio Benco, ricevette alla sua uscita una favorevole accoglienza dalla stampa, con ampie recensioni sul «Corriere della Sera», «La Stampa» e altri quotidiani, e dai lettori, sino a raggiungere in poco tempo la terza edizione. Un successo forse insperato capace poi di trascinare altre opere scritte, ma in tutti i casi sarebbe meglio dire pensate da Ford in collaborazione con il giornalista Samuel Crowther inaugurando il sodalizio tra un uomo pubblico di successo con un abile divulgatore. Sarà anche, e forse soprattutto, attraverso la pubblicazione, e le tante traduzioni, dell'autobiografia che Ford cercherà di utilizzare la popolarità per diffondere la sua filosofia della società⁸⁶. Pure la traduzione della biografia di Edison scritta da George S. Bryan puntava non solo a proporre al pubblico una vera stenna da regalare⁸⁷, ma a sottolineare la figura del protagonista ergendolo a emblema dell'uomo economico universale – inventore, ingegnere, imprenditore, scienziato – a cui proprio Ford doveva molto avendolo come amico e consigliere⁸⁸.

Sarà comunque la storia dell'arte il campo privilegiato da Apollo, il vero biglietto da visita capace di dare alla casa editrice una identità riconoscibile. Non vi è dubbio, infatti, che la scelta bolognese qualificherà la linea editoriale

⁸⁶ E. Ford, *La mia vita e la mia opera*, in collaborazione con Samuele Crowther, Bologna, Apollo, 1925, il nome del traduttore Silvio Benco non appare sul frontespizio. Il sodalizio con Crowther sarà duraturo e produrrà altri lavori: nel 1926 veniva pubblicato *L'oggi e il domani*, versione di Lorenzo Tealdi, Torino, Sit, 1926, che sulla copertina sottolineava come il volume dovesse considerarsi la continuazione di *La mia vita e la mia opera*. Nel 1931 era tradotto, con un discreto successo, *Perché questa crisi mondiale?* prefazione di Ulisse Gobbi, traduzione autorizzata da Giacomo Prampolini, Milano, Bompiani. Per un inquadramento storico dell'autobiografia di Ford si veda l'introduzione di Peppino Ortoleva alla nuova edizione (che tuttavia manterrà la traduzione Apollo) de *La mia vita e la mia opera*, Milano, Salamandra, 1980. Sempre nello stesso volume cfr. la postfazione di Ortoleva (*Henry, Heinrich, Enrico Ford: il fordismo come «luogo comune» nella cultura europea degli anni Venti*) che discute la lettura partecipe e acuta fatta da Carlo Rosselli, Gramsci e Gobetti. Per altre informazioni e osservazioni, anche sulla figura e il ruolo svolto da Samuel Crowther, cfr. P. Bairati, *Henry Ford e il tramonto della civiltà del cavallo*, introduzione a H. Ford, *Autobiografia*, a cura di S. Crowther, traduzione di Piero Bairati, Milano, Rizzoli, 1982. Singolarmente in questa traduzione, mentre Bairati sostiene essere Crowther l'autore vero dell'opera, sul frontespizio appare invece come curatore.

⁸⁷ Ne «L'Avvisatore librario settimanale», vol. II, n. 44, 1929, p. 832, la casa editrice Apollo presentava così il volume di G.S. Bryan, *Edison. L'uomo e la sua vita*, Bologna, Apollo, 1928: «Per il cinquantenario della lampada elettrica offrite il racconto della vita di Edison più attraente di un romanzo».

⁸⁸ La storia dell'incontro e poi della collaborazione tra Edison e Ford è narrata dallo stesso Ford (con Samuel Crowther) in *Edison as I knew him*, pubblicato a New York nel 1930 e tradotto da Bompiani l'anno seguente con il titolo *Il mio amico Edison*. È stato poi riproposto nel 1992 da Bollati Boringhieri con la stessa traduzione.

per la capacità di recepire nel modo migliore autori, istanze e suggerimenti provenienti da una città e da una università dove alcune delle forze più fresche e intraprendenti si erano al meglio coniugate con maestri riconosciuti⁸⁹. Prima di affrontare e proporre temi impegnativi, Mayländer si era dedicato a supportare il lavoro lungo e complesso di gallerie, istituti, musei, dediti al riordino e alla collaborazione dell'imponente patrimonio artistico italiano. Due anni durerà l'impegno come editore della rivista «Faenza», bollettino fondato nel 1913 da Gaetano Ballardini per dare voce alle tante iniziative di ricerca avviate dal Museo internazionale delle ceramiche⁹⁰. Nel 1926, dopo aver curato abbonamenti e inserzioni, la Apollo passerà la mano allo Stabilimento grafico Lega che sino ad allora ne era stato lo stampatore. Più rilevante sarà la presenza nel campo dei cataloghi. Qui, accanto alla pubblicazione di volumi redatti dal personale interno di gallerie e pinacoteche, si avranno le prime importanti prove di Federico Hermanin, allievo di Adolfo Venturi e autorevole rappresentante di quella notevole teoria di storici dell'arte che negli anni Venti e Trenta lavorarono nelle soprintendenze e nei musei prima di passare alla carriera accademica⁹¹. Se queste opere consentirono all'editore di creare qualche legame istituzionale, le maggiori energie Mayländer le profuse nelle

⁸⁹ Una ricostruzione attenta, con pagine dedicate alla Apollo, si può leggere in C. Nicosia, *L'editoria d'arte tra le due guerre*, in G. Tortorelli (ed.), *Editoria e cultura in Emilia e Romagna dal 1900 al 1945*, Bologna, Patron, 2007, pp. 119-132. Nello stesso volume è da vedere, per gli anni precedenti, il saggio di M. Pasquali, «Dai merli riflorenti...». *Vicende e protagonisti dell'arte, riviste e libri nella Bologna di Giosuè Carducci e di Alfonso Rubiani: 1880-1907*, pp. 185-206.

⁹⁰ Sulla figura di Gaetano Ballardini, direttore del Museo e del semestrale «Faenza» cfr. la voce di Giuseppe Liverani, in *Dizionario biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, 1963, Vol. 5, pp. 567-568, poi in «Faenza», vol. LXXXIX, nn. 1-6, 2003, pp. 6-7. Su alcuni numeri della rivista usciranno anche brevi segnalazioni di lavori editi da Apollo e di autori che collaboreranno in seguito con la casa editrice: cfr. «Faenza», vol. XII, n. 1, 1924, p. 18 per Adolfo Venturi e vol. XIII, n. 6, 1925, p. 93, per Federico Hermanin.

⁹¹ *Le Gallerie regie dell'Accademia di Venezia*, catalogo a cura della Direzione, Bologna, Apollo, 1924; la stessa opera ebbe una traduzione in inglese nel 1928; *La Pinacoteca Tosio e Martinengo*, Bologna, Apollo, 1927, in testa al frontespizio è riportato Città di Brescia; F. Hermanin, *Catalogo della R. Galleria d'arte antica nel Palazzo Corsini - Roma*, Bologna, Apollo, 1924; Id., *Il Palazzo di Venezia: Museo e grandi sale. Descrizione e catalogo dell'appartamento di Paolo II*, Bologna, Apollo, 1925. Senza data è il volume *Museo bizantino di Atene: icone*, con la presentazione di Manolis Chetizidakis. Allievo di Venturi, Federico Hermanin condensava in una lettera a Corrado Ricci il complesso rapporto che legava la generazione più giovane cresciuta all'ombra del maestro visto come «una specie di nuovo Saturno» divoratore di coloro «che per dritto o per traverso si consideravano suoi figli in scienza», ma al quale si serbava sempre gratitudine. La lettera di Hermanin a Corrado Ricci del 9 dicembre 1905, Ravenna, Biblioteca Classense, Carteggio Ricci, Vol. 95, n. 18211 è ora riprodotta in G. Bosi Maramotti, *I rapporti di Adolfo Venturi con Corrado Ricci*, in G. Agosti (ed.), *Incontri venturiani (22 gennaio-11 giugno 1991)*, Pisa, Scuola Normale Superiore, 1995, pp. 34-35. Sulla vasta esperienza di Hermanin nel campo dell'allestimento e salvaguardia delle collezioni, sui forti legami e poi sui motivi di dissenso con le impostazioni teoriche e di intervento portate avanti da Venturi, sull'ampia produzione scientifica cfr. ora la voce esauriente di P. Nicita Misiani, in *Dizionario biografico degli Italiani*, Roma, Istituto della Enciclopedia Italiana, 2003, Vol. 61, pp. 693-697.

due collane *I Grandi maestri del colore*, pubblicata dal 1922 al 1925, e *Storia monumentale dell'arte italiana* che, partita nel 1928, si concludeva nel 1932. *I Grandi maestri del colore* era presentata nel catalogo commerciale come una collezione «che desterà certamente grandissimo interesse nel campo artistico e fra il pubblico colto» e che si era certi potesse avere una larghissima diffusione «dato il prezzo modico e la sua importanza». Il progetto era quello di proporre in tre serie di dieci fascicoli ciascuna, con otto tavole fuori testo e una concisa introduzione, le «opere più rappresentative dei grandi pittori Italiani e Stranieri, meravigliosamente riprodotte dagli originali, si da dare la visione esatta degli stessi in tutte le particolarità tecniche e coloristiche». Era un tentativo che non cadeva nel vuoto perché poteva rifarsi sia a modelli importanti e consolidati, come la collana tedesca *Klassiker der Kunst* uscita nel 1904 insieme a altre simili iniziative francesi e inglesi, sia in Italia alla *Collezione* di Alinari e alla fortunata serie *Italia artistica* edita a partire dal 1901 dall'Istituto d'Arti Grafiche di Bergamo. La scelta degli artisti inseriti premiava il Cinquecento italiano ed europeo e accordava scarso rilievo al Rinascimento italiano, mentre per i secoli successivi le preferenze sono piuttosto casuali e squilibrate, se, ad esempio, il diciannovesimo appare secolo tedesco per eccellenza con l'inserimento di Klinger, von Stuck, Böcklin e con la sola presenza di Manet a tenere alta la bandiera francese⁹². Se questa iniziativa rimaneva comunque nel solco della divulgazione, pure curata e attenta a non svilire nella stampa la resa pittorica degli originali, sarà la *Storia monumentale dell'arte italiana*, ma in alcune *réclame* che precedettero l'uscita dell'opera si faceva precedere l'aggettivo nuova al sostantivo storia, che segnerà la stagione più impegnativa per Apollo. Preceduta da alcuni lavori diseguali, che comunque come si evidenziava in un annuncio de «L'Avvisatore librario settimanale» avevano favorito la notorietà della casa editrice «per un numero cospicuo di pregevoli pubblicazioni d'arte»⁹³, «quest'opera grandiosa che avrà il titolo generale di *Collezione Pantheon*», aveva richiesto una preparazione di parecchi anni. Si prevedevano circa 25 volumi di grande formato che avrebbero dovuto dare «la

⁹² Sul progetto e le scelte della collana cfr. Nicosia, *L'editoria d'arte tra le due guerre*, cit., p. 129.

⁹³ Cfr. «L'Avvisatore librario settimanale», vol. I, n. 2, 1928, p. 25; L. Zanetti, *Raffaello. Disegni e lettere*, Bologna, Apollo, 1924; O. Grosso, *Storia dell'arte giapponese*, Bologna, Apollo, 1925, nella presentazione Grosso ringraziava il direttore del Museo Chiossone di Genova per i suggerimenti sulle collezioni di arte giapponese contenute in quel museo. Si veda poi, a questo proposito, O. Grosso, *Il Museo Chiossone di Genova*, Roma, La Libreria di Stato, 1934, il volume faceva parte della collana *Itinerari dei Musei e monumenti d'Italia*, edita dal Ministero della Educazione nazionale. N. Tarchiani, *Italia medievale*, Bologna, Apollo, 1925; R. Papini, *Fra Giovanni Angelico*, Bologna, Apollo, 1925, con fotografie della casa editrice Alinari; F. Malaguzzi Valeri, *Arte gaia*, Bologna, Apollo, 1926. Sulla figura e i lavori di Malaguzzi Valeri cfr. S. Samek Ludovici, *Enciclopedia biografica e bibliografica italiana. Serie 4: Storici, teorici e critici delle arti figurative (1800-1940)*, Roma, Tosi, 1942, pp. 214-216, per i suoi rapporti con Supino e per le divergenze metodologiche con Venturi cfr. G.C. Sciolla, F. Varallo (edd.), «L'Archivio storico dell'arte» e *le origini della Kunstwissenschaft in Italia*, Alessandria, Edizione dell'Orso, 1999, pp. 228-229.

rappresentazione compiuta di un intero periodo artistico opera dei più insigni cultori della storia dell'arte». Oltre a un testo esauriente sull'argomento scelto, ogni volume avrebbe contenuto da 80 a 120 tavole, riprodotte con «quanto di più perfetto è stato raggiunto nella tecnica delle illustrazioni». Una cura rivolta anche alla veste tipografica e alla stampa del testo, affidati alla Officina Bodoni di Verona, come pure alle rilegature in mezza pelle «che congiungeranno solidità e buon gusto». Infine, concludeva l'annuncio, «per rendere accessibile anche in altri paesi i nostri tesori artistici nazionali, i volumi della *Collezione Pantheon* usciranno contemporaneamente in edizioni inglesi, tedesche e spagnole, cosicché la nostra intrapresa porterà in tutto il mondo la gloria del genio italiano».

Quali avvenimenti e incontri fossero intervenuti per fare stilare a Mayländer un programma così impegnativo e soprattutto con quali forze intendesse portarlo avanti è importante comprendere per capire un capitolo della Apollo che, a posteriori, appare decisivo nel delineare una vera e propria svolta. Dell'interesse di Mayländer sin dall'inizio della sua attività, per la storia dell'arte è stato già detto, ma le modeste disponibilità economiche dell'editore certo non sarebbero state sufficienti per affrontare spese molto più impegnative. Bisognerà aspettare il 1924 e l'entrata in scena di un editore geniale come Kurt Wolff, che poi per la parte tipografica tirerà nell'impresa l'Officina Bodoni di Hans Mardesteig, per capire quanto e come la nuova avventura si discostasse significativamente da altri progetti analoghi⁹⁴. Il programma e il progetto della nuova casa editrice Pantheon, che vedeva associati Wolff, Daniel Brady (il quale lascerà il posto all'editore inglese John Habrayd Reece) e Curt Sigmar Gutking, prevedeva «di creare un nuovo genere di libro d'arte internazionale nel contenuto, grazie alle traduzioni in almeno tre lingue, ed esclusivo nella fattura, stampato dalle migliori tipografie del tempo con tirature limitate, in modo da interessare sia gli studiosi di storia sia i bibliofili».

A Reece si dovrà poi l'accordo con gli americani Harcourt, Brace & Co. e con l'editore spagnolo Gustavo Gili, mentre sarà Mardesteig a convincere Wolff a cedere alla casa editrice Apollo sia la produzione in italiano della Pantheon, sia la commercializzazione delle stesse opere in lingua inglese e tedesca. Mayländer

⁹⁴ Sulle scelte anticipatrici e la carriera editoriale di Kurt Wolff rimane importante la tesi di laurea di Franco Doni, *Kurt Wolff: un editore tedesco in Italia. Profilo storico e catalogo della casa editrice Pantheon (1924-1936)*, Università degli Studi di Firenze, Corso di laurea in Lingua e Letteratura tedesca, a.a. 1991-1992 relatore Giuseppe Bevilacqua, da cui poi F. Doni, *Kurt Wolff e Pantheon. Casa editrice per arte e cultura (1924-1932). Ipotesi per una storia delle relazioni europee tra le due guerre*, in L. Finocchi, A. Gigli Marchetti (edd.), *Editori e lettori. La produzione libraria in Italia nella prima metà del Novecento*, Milano, Franco Angeli, 2000, pp. 260-281, con notizie non sempre precise su Mayländer, p. 274 e F. Doni, *Arte ed editoria: presenze femminili intorno a Villa I Tatti tra le due guerre*, in M.C. Mocali, C. Vitale (edd.), *Cultura tedesca a Firenze. Scrittrici e artiste tra Otto e Novecento*, Firenze, Le Lettere, 2005, pp. 217-233. Qualche notizia anche in P. Collini, *Kurt Wolff. Il Gutenberg dell'Espressionismo*, «Belfagor», vol. LX, n. 2, 2005, pp. 173-184 dove nel titolo si richiama la nomea di Wolff editore di autori legati al movimento espressionista. Cosa che, se pure vera, sarà sempre rifiutata da Wolff che la riteneva riduttiva per la lettura del suo progetto.

si trovava così coinvolto in un progetto ambizioso, portato avanti da autorevoli editori di fama europea che, tra i primi, inauguravano un settore, quello delle coedizioni, certo non facile da impostare e sorreggere. Vi fu qualche successo iniziale di vendita, ma durò poco. Soprattutto in Italia Mayländer si rese subito conto, e basta leggere la lettera del 19 novembre 1928 a Mardersteig⁹⁵, che gli sbocchi per la vendita erano ridotti al minimo e neanche il coinvolgimento di Arnoldo Mondadori era in grado di assicurare una inversione di tendenza⁹⁶.

Quando la crisi economica internazionale incomincerà a mordere e i passivi si faranno sempre più vistosi, vanificando qualsiasi possibilità di rilancio, Wolff sarà costretto a chiudere questa esperienza, per poi ritentarla con successo anni dopo negli Stati Uniti. La composizione del catalogo e l'articolazione degli argomenti era stata affidata a un comitato composto da insigni storici dell'arte – Wilhelm von Bode, Heinrich Wölfflin, Wilhelm Reinhold Valentier, Bernard Berenson e gli italiani Arduino Colasanti e Adolfo Venturi – che furono preziosi protagonisti nel mantenere e stimolare i contatti con prestigiosi istituti culturali⁹⁷. La periodicità dei volumi era programmata su due, tre volumi l'anno da vendersi anche separatamente, mentre i contenuti riguardavano argomenti che spaziavano dal Trecento al Seicento. Il contributo di autori stranieri era limitato, ma di grande livello: nel 1930 erano pubblicati *La scultura preromanica in Italia* di Arthur Haseloff e *La pittura senese del Trecento* di Curt Weigelt. Più ampia la presenza italiana con studiosi amici di Adolfo Venturi o provenienti dalla sua scuola romana, alcuni di loro avranno un passaggio non fugace nell'Università di Bologna, dove è probabile abbiano anche intrattenuto rapporti con Mayländer. Lo stesso Venturi, che al progetto *Pantheon* aderiva con i volumi *La pittura del Quattrocento nell'Alta Italia. Lombardia – Piemonte – Liguria* e *La pittura del Quattrocento nell'Emilia*, si faceva tramite importante per la partecipazione dei suoi allievi ai cataloghi Zanichelli e Apollo. Nel 1929 Giuseppe Fiocco, allievo di Supino a Bologna e di Venturi a Roma⁹⁸, pubblicava

⁹⁵ La lettera sconfortata di Mayländer è riportata in Doni, *Kurt Wolff e Pantheon*, cit. p. 275.

⁹⁶ Per tutta la vicenda Pantheon-Mondadori, oltre a Doni, *Kurt Wolff e Pantheon*, cit. pp. 276-280, cfr. E. Decleva, *Arnoldo Mondadori*, Torino, UTET, 1993, pp. 186-187.

⁹⁷ Pensiamo a Berenson e al suo collegamento con l'Università di Harvard o a Curt Heinrich Weigelt vicedirettore del Kunsthistorisches Institut di Firenze, su cui vedi M. Seidl (ed.), *Storia dell'arte e politica culturale intorno al 1900. La fondazione dell'Istituto germanico di storia dell'arte di Firenze*, Venezia, Marsilio, 1999.

⁹⁸ Sugli interessi di Fiocco cfr. «Saggi e memorie di storia dell'arte», vol. 8, 1972, con l'elenco delle sue pubblicazioni a cura di L. Frizzino, pp. 68-78; «Saggi e memorie di storia dell'arte», vol. 29, 2005, dove tra i tanti contributi, si segnalano, G. Tomasella, *L'insegnamento universitario di Giuseppe Fiocco*; F. Bernabei, *Il laboratorio critico di Giuseppe Fiocco*; A. Rovetta, *Nota milanese per Giuseppe Fiocco, docente all'Università Cattolica*, pp. 217-224, 225-242, 347-348. Per le vicende accademiche, contraddistinte anche da duri scontri, G. Tomasella, *Le origini dell'insegnamento della storia dell'arte all'Università di Padova. Da Andrea Moschetti a Giuseppe Fiocco*, «Quaderni per la storia dell'Università di Padova», 2002, 35, pp. 69-96. Si veda anche la voce di Stefano Coltellacci in *Dizionario biografico degli Italiani*, Roma, Istituto della Enciclopedia italiana, 1997, Vol. 48, pp. 86-88.

La pittura veneziana del Seicento e Settecento, tra i primi lavori di sintesi che attesteranno poi la fedeltà e predilezione per l'arte veneta, e l'anno precedente la monografia su Paolo Veronese. Un lavoro quest'ultimo, che, anche se non inserito nella collana *Storia monumentale dell'arte italiana* segnalava insieme al Mantegna, l'importanza attribuita a Veronese⁹⁹. Completavano la collana lo studi di Pietro Toesca sulla pittura fiorentina del Trecento, le due importanti ricerche di Aldo De Rinaldis sulla pittura nel Seicento e il contributo di Corrado Ricci sulla pittura del Cinquecento nell'Italia settentrionale¹⁰⁰.

Con queste pubblicazioni la storia della Apollo si avviava alla conclusione. In data 8 gennaio 1929 Mayländer presentava al Consiglio provinciale dell'economia di Bologna la denuncia di cessazione dell'attività della casa editrice e la notizia del trasferimento della ditta a Verona. Mayländer abbracciava l'impegnativo progetto di Kurt Wolff di offrire al pubblico italiano un prodotto di alta qualità con il quale i due editori pensavano di potersi inserire nel difficile mercato editoriale dei libri d'arte. Le cose non andarono come si sperava e anche Apollo, pure non così esposta come Pantheon, dovette ridimensionare le aspettative e subire pesanti conseguenze economiche. Alcuni volumi, come *La pittura dell'Italia* centrale di Roberto Longhi, annunciati in uscita per il marzo 1929 non riuscirono a vedere la luce anche se tracce della attività della casa editrice si possono rinvenire fino al 1933. In questi pochi anni sarà ancora l'antico interesse per la storia dell'arte a prevalere e i volumi di Giuseppe Delogu, Wart Arslan, Sandberg-Valalà, Roberto Pallucchini, Alis Levi¹⁰¹, la ricerca eccentrica

⁹⁹ G. Fiocco, *L'arte di Andrea Mantegna*, Bologna, Apollo, 1927, con una breve ma interessante introduzione metodologica. Nel 1937 nella collana *Valori plastici* edita da Hoepli, uscirà la monografia *Mantegna*, poi tradotta nel 1938 da Gallimard, e ancora apparsa senza data presso «Le Musée de la Pléiade».

¹⁰⁰ C. Ricci, *La pittura del Cinquecento nell'Alta Italia: Piemonte, Liguria, Lombardia, Emilia*, Verona, Edizioni Pantheon-Casa Editrice Apollo, 1928; A. De Rinaldis, *La pittura del Seicento nell'Italia meridionale*, Verona, Edizioni Pantheon-Casa Editrice Apollo, 1929; Id., *La pittura del Seicento napoletano*, Verona, Edizioni Pantheon-Casa editrice Apollo, 1929; P. Toesca, *La pittura fiorentina del Trecento*, Verona, Edizioni Pantheon-Casa Editrice Apollo, 1929. Su Toesca, e con riferimenti a questa opera cfr. M. Aldi, *Pietro Toesca tra cultura tardo positivista e simbolismo. Dagli interessi letterari alla storia dell'arte*, «Annali della Scuola Normale Superiore di Pisa», classe lettere e filosofia, serie a. IV, vol. II, n. 1, 1977, pp. 145-179, e F. Crivello (ed.), *Pietro Toesca all'Università di Torino. A un secolo dall'istituzione della cattedra di storia dell'arte medievale e moderna 1907-1908/2007-2008*, *Atti della Giornata di studi, Torino, 17 ottobre 2008*, Alessandria, Edizioni dell'Orso, 2011.

¹⁰¹ Ricordiamo almeno: G. Delogu, *G.B. Castiglione detto il Grechetto*, Bologna, Apollo, 1928; Id., *Nicolò Barberino*, prefazione di A. Vernazza, Bologna, Apollo, 1928; E. Sandberg-Valalà, *La croce dipinta e l'iconografia della passione*, Bologna, Apollo, 1929, poi ristampata nel 1985 da Multigrafica di Roma; W. Arslan, *I Bassano*, Bologna, Apollo, 1931, una seconda edizione uscirà a Milano nel 1960. Su Arslan con riferimento ai suoi studi sull'arte veneta e al volume *I Bassano*, «monografia che resta ancora esemplare come impostazione storiografica», cfr. R. Ruscio, *Il fondo Arslan: studi e percorsi di uno storico dell'arte*, in Id. (ed.), *Lettere a Wart. Il fondo Arslan: studi e percorsi di uno storico dell'arte*, Spoleto, Centro italiano di studi sull'alto medioevo, 2005, pp. 1-14. Nel volume, oltre agli importanti carteggi con Giuseppe Fiocco, Rodolfo Pallucchini, Pietro Toesca, è da leggere la lettera, non datata e in chiaroscuro (p. 229), di Roberto Longhi su

e solitaria di Cesare Ratta¹⁰², il tentativo, subito però arenatosi, di rilanciare con *Ars viva* una *Nuova collezione di saggi critici*¹⁰³, accompagneranno gli ultimi tentativi di fare sopravvivere le passioni e gli interessi di una vita.

I Bassano. Per i rinvii del libro pubblicato da Apollo ad altri studi di Arslan cfr. la bibliografia in *Arte in Europa. Scritti di storia dell'arte in onore di Edoardo Arslan*, Pavia, Università di Pavia, 1965-1966, Vol. I, con l'aggiornamento in *Lettere a Wart*, cit., pp. 347-367, e i saggi compresi in *Yetwart Arslan. Una scuola di storici dell'arte*, Atti della giornata di studi, Venezia, Marsilio, 1983. Il volume di Rodolfo Pallucchini, *L'arte di Giovanni Battista Piazzetta*, prefazione di Giuseppe Fiocco, Bologna, Giuseppe Mayländer, porta la data 1934, con la stampa a Padova presso la Tipografia del Seminario. Pallucchini si era laureato nel 1931 con Giuseppe Fiocco discutendo una tesi su Piazzetta e la sua scuola (cfr. R. Pallucchini, *Giuseppe Fiocco e la pittura veneziana del Sei e del Settecento*, «Saggi e memorie di storia dell'arte», vol. 8, 1972, p. 31), aveva poi lavorato alla Galleria Estense di Modena e come direttore delle Belle Arti presso il Comune di Venezia, prima di diventare professore straordinario in Storia dell'Arte nell'Università di Bologna. Documenti sulla sua carriera nell'Archivio storico dell'Università di Bologna. L'attenzione per Piazzetta durerà tutta la vita con numerosi articoli e monografie tra cui vanno ricordati *Attorno a Piazzetta*, s.l., s.n.t., 1933; *Giovanni Battista Piazzetta*, a cura di R. Pallucchini, Roma, Tumminelli, 1942; *Piazzetta*, Milano, A. Martello, 1956; *L'opera completa del Piazzetta*, presentazione di Rodolfo Pallucchini, apparati critici e filologici di Adriano Mariuz, Milano, Rizzoli, 1982; A. Levi, *Capri*, disegni con otto ricaricati di Gabriele D'Annunzio, prefazione di Giorgio Nicodemi, Bologna, Giuseppe Mayländer, 1933, Su Levi, oltre alle sue opere, cfr. A. Levi, *Preludio all'impossibile*, prefazione di Carlo Arturo Jemolo, note di Renato Monteleone, Padova, Rebellato, 1960 e *Arte e verità di Alis Levi*, catalogo delle opere donate alla Galleria d'Arte Moderna "Mario Remoldi" delle Regole d'Ampezzo, Roma, Azzurra, 1983.

¹⁰² *Artisti moderni italiani*, a cura di C. Ratta, Bologna, Apollo, s.d. Su Ratta e sulla sua produzione editoriale cfr. G. Tortorelli, *Tradizione e modernità. Cesare Ratta e la Scuola d'Arte tipografica di Bologna*, Bologna, Pendragon, 2009.

¹⁰³ Della collana usciranno solo due monografie, S. Bettini, *L'arte di Jacopo Bassano*, Bologna, Apollo, 1933 e L. Coletti, *L'arte di Tomaso da Modena*, Bologna, Apollo, 1933.

*The minor universities in the higher education
system of united Italy: the case of the
University of Macerata*

Proceedings of the study seminar
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*Gli atenei minori nel sistema d'istruzione
superiore dell'Italia unita: il caso
dell'Università di Macerata*

Atti del seminario di studi
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Here below we will reproduce the papers by Gian Paolo Brizzi (University of Bologna, CISUI – Interuniversity Centre for the History of Italian Universities), Floriana Colao (University of Siena) and Simonetta Polenghi (Catholic University Sacro Cuore of Milan). They were presented in the study seminar on the theme: *The minor universities in the higher education system of united Italy: the case of the University of Macerata*, held in the Aula Magna of the University of Macerata on 27th November 2013, on the occasion of the publication of the volumes: Luigiaurelio Pomante (ed.), *L'Università di Macerata nell'Italia unita (1861-1966). Un secolo di storia dell'ateneo maceratese attraverso le relazioni inaugurali dei rettori e altre fonti archivistiche e a stampa*, introduction by Roberto Sani, Macerata, eum, 2012; and Luigiaurelio Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, preface by Gian Paolo Brizzi, Macerata, eum, 2013.

Sono qui di seguito riprodotti i contributi presentati da Gian Paolo Brizzi (Università degli Studi di Bologna, CISUI – Centro Interuniversitario per la Storia delle Università Italiane), Floriana Colao (Università degli Studi di Siena) e Simonetta Polenghi (Università Cattolica del Sacro Cuore di Milano) al seminario di studi sul tema: *Gli atenei minori nel sistema d'istruzione superiore dell'Italia unita: il caso dell'Università di Macerata*, tenutosi nell'Aula Magna dell'Università degli Studi di Macerata il 27 novembre 2013, in occasione della pubblicazione dei volumi: Luigiaurelio Pomante (ed.), *L'Università di Macerata nell'Italia unita (1861-1966). Un secolo di storia dell'ateneo maceratese attraverso le relazioni inaugurali dei rettori e altre fonti archivistiche e a stampa*, introduzione di Roberto Sani, Macerata, eum, 2012; e Luigiaurelio Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, presentazione di Gian Paolo Brizzi, Macerata, eum, 2013.

Universities in the papal Marca: «imperfectae, perfectae aut perfectissimae»?*

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ABSTRACT: Recent studies by L. Pomante have traced the numerous difficulties facing the University of Macerata in trying to rise above its 'minor university' *status* with which it had been identified since the latter years of the *Ancien Régime*. This is an exemplary case which serves to describe the causes of the decline of a *Studium generale*. The University of Macerata was the first to be established in the Papal region of Marca (1540), operating over two and a half centuries it contributed towards the spread of culture and the teaching of professional bodies in the region. Its decline began to manifest itself from the second half of the seventeenth century and led to the University of Macerata being downgraded to a secondary education institute during the Napoleonic era and then, during the Restoration period of the Papal States, to a second order university. The causes behind this were numerous: the excessive proliferation of university establishments in Papal Marca (unique in Europe at the time for its high number) which led to a reduction in student numbers; the lack of adequate funding which meant the teaching support guaranteed by local Jesuit schools was indispensable; the corporative nature of the teaching body which was averse to any type of reform policy.

EET/TEE KEYWORDS: University; History; Religious Education; Italy; XVI-XVII Centuries.

The publication containing the Chancellors' reports of the University of Macerata and the monograph by Luigiaurelio Pomante on the University of Macerata¹ cover events concerning the University during the nineteenth and

* The papal Marca corresponds approximately to the current Marche region.

¹ L. Pomante, *Per una storia delle università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, Macerata, eum, 2013; Id. (ed.), *L'Università*

twentieth centuries. Furthermore, compared to as recently as fifteen years ago, we have a much clearer picture of events concerning the early modern period thanks to research carried out by Sandro Serangeli, and these events deserve certain consideration². It was, in fact, the early modern period that defined the role the University acquired in the territory over which it exercised its main influence, and it may be useful to trace certain factors which contributed to influencing its original form and determine later developments.

Universities during the ancien régime: an uneven distribution

First and foremost, it has to be noted that the territory of today's Marche region represented, during the period between the sixteenth century and the Napoleonic era, a unique case as far as the provision of higher education was concerned. The three centuries saw an anomalous proliferation of university institutes, whereas in other states of the Italian peninsular higher education was entrusted in most cases to a single university³. By this term, university is meant as an institute which acquired *Studium generale* status and could therefore award degrees (*licentia ubique docendi*)⁴. Turin, for a long period, was the only

di Macerata nell'Italia unita (1861-1966). Un secolo di storia dell'ateneo maceratese attraverso le relazioni inaugurali dei rettori e altre fonti archivistiche e a stampa, Macerata, eum, 2012.

² Sandro Serangeli, professor of History of Roman law, undertook an ambitious program of work on the history of the University of Macerata: S. Serangeli (ed.), *Atti dello Studium generale Maceratense dal 1541 al 1551*, Torino, G. Giappichelli, 1998; Id. (ed.), *Atti dello Studium generale Maceratense dal 1551 al 1579*, Torino, G. Giappichelli, 1999; Id., *I laureati dell'antica Università di Macerata, 1541-1824*, Torino, G. Giappichelli, 2003; Id., L. Ramadù-Mariani, R. Zambuto (edd.), *Gli Statuta dell'antica Università di Macerata, 1540-1824*, Torino, G. Giappichelli, 2006; Id., *I docenti dell'antica Università di Macerata (1540-1824)*, Torino, G. Giappichelli, 2010. For previous studies, please refer to: B. Donati, *Lettore leggista e scolari modenese alla Università di Macerata nei primi anni del Seicento*, Modena, Modenese, 1924; A. Gemelli, S. Vismara, *La riforma degli studi universitari negli stati pontifici (1816-1824)*, Milano, Vita e Pensiero, 1933; A. Marongiu, *L'Università di Macerata nel periodo delle origini*, «Annali dell'Università di Macerata», vol. 17, 1948, pp. 3-73; A. Visconti, *L'Università di Macerata nel passato e nel presente*, «Annali dell'Università di Macerata», vol. 17, 1948, pp. 29-58; M. Corsi, *L'Università di Macerata nel periodo della Restaurazione, 1816-1824*, Fermo, Tip. La rapida, 1978.

³ R. Kagan, *Le Università in Italia, 1500-1700*, «Società e storia», vol. 7, 1985, pp. 275-317; P. Del Negro, *Il Principe e l'Università in Italia dal XV secolo all'età napoleonica*, in G.P. Brizzi, A. Varni (edd.), *L'università in Italia fra età moderna e contemporanea. Aspetti e momenti*, Bologna, Clueb, 1991, pp. 11-27; P.F. Grendler, *Delle cause della grandezza e magnificenza delle università italiane*, in G.P. Brizzi, A. Mattone (edd.), *Le origini dello Studio generale sassarese nel mondo universitario europeo dell'età moderna*, Bologna, Clueb, 2013, pp. 11-19.

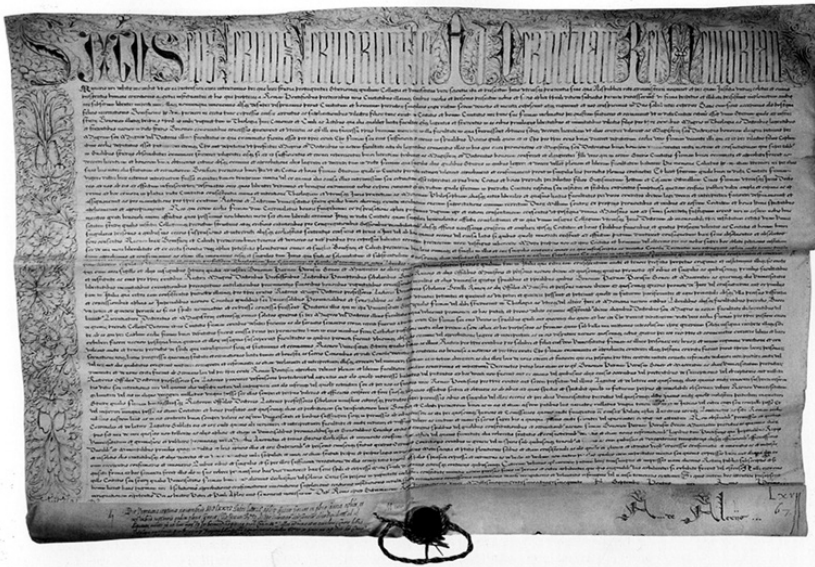
⁴ G. Ermini, *Concetto di "Studium generale"*, «Archivio giuridico Filippo Serafini», vol. 7, 1942, pp. 3-24; P. Nardi, *'Licentia ubique docendi' e 'Studium generale' nel pensiero giuridico del secolo XIII*, in A. Ennio Cortese, 3 voll., Roma, Il Cigno, 2001, Vol. 2, pp. 471-477; Id., *Le origini del concetto di 'Studium generale'*, «Rivista Internazionale di diritto comune», vol. 3, 1992, pp. 47-78; O. Pedersen, *The first Universities. Studium generale and the origins of university*

Studium generale in the Italian territories of the Savoy, but also the Duchy of Milan, the Republic of Venice, the vast territory of the Kingdom of Naples, and the Duchies of Farnese and Este had single universities in their territories: Pavia, Padua, Naples, Parma and Ferrara, respectively. Other States had two seats, such as the Kingdom of Sicily which, alongside Catania, saw a *Studium generale* established in Messina; in the Grand Duchy of Tuscany, the presence of two universities was the consequence of the conquest of the Republic of Siena by the Medici, although Pisa held the position of being the main university in the Grand Duchy⁵; in the Kingdom of Sardinia, after attempts which had lasted over various decades, the antagonism between Sassari and Cagliari led to the institution of two universities, thus providing an excessive provision of higher education in relation to the real needs of the region's population⁶. The picture here demonstrates, then, a decidedly disproportionate provision of higher education, distributed particularly unevenly from one Italian region to another. It also enables us to identify the fanciful thinking which led to the creation of certain universities, and whose creation derived more from the ambitions of a sovereign or certain town oligarchies rather than aims to boost student numbers. From this general picture, it is possible at an early stage to identify reasons behind certain later developments which would see some of these universities experience extreme difficulties. These would be due to various factors such as drastic reductions in funding or differences in the range of teaching provision which would make it more difficult for some universities to compete with others. Such factors would make certain universities fall easy prey to recurring crises, as was the case with the Sardinian universities. Otherwise, difficulties would arise as a consequence of the political role of the city hosting the *Studium generale*, as was the case in Siena and Messina. Siena was neglected by the grand dukes in favour of Pisa, while Messina, after the city revolt, saw itself deprived of its university for sixty years. Despite being institutes with identical juridical status, their authority was perceived in markedly differing ways by their contemporaries, as was clearly demonstrated by student mobility, a situation moreover common to the majority of European universities. Alongside those universities which played a prestigious cultural role and were able to recruit over wide geographical areas, were other higher education institutes. Comparable to further education colleges, these institutes had few chairs and which, in more difficult times, the teaching committee would turn into «graduate production lines», and where it was possible to acquire, or it

education in Europe, Cambridge, Cambridge University Press, 1997; P. Nardi, *Dalle Scholae allo Studium generale: la formazione delle università medievali*, in F. Liotta (ed.), *Studi di storia del diritto medievale e moderno*, Milano, Monduzzi Editoriale, 1999, pp. 1-32.

⁵ G. Cascio Pratilli, *L'università e il Principe. Gli Studi di Siena e Pisa fra Rinascimento e Controriforma*, Firenze, Leo S. Olschki, 1975.

⁶ For a concise presentation of these universities see: G.P. Brizzi, P. Del Negro, A. Romano (edd.), *Storia delle Università in Italia*, 3 voll., Messina, Sicania, 2007.



Pic. 1. Pope Paul III confers the privilege of foundation of the University of Macerata (Macerata, Municipal Library).

could be said purchase, an academic qualification for a modest fee and acquire an even more modest cultural education. This was illustrated by, among others, Willem Frijhoff in a couplet making fun of the ease with which at Harderwijk it was possible to buy – just as easily as smoked herrings and blueberries – university diplomas⁷.

The case of the universities in the Italian peninsula presented, however, if compared to the general European picture, an anomaly entirely peculiar to Italy: those universities active in the Italian territories of the Papal States, with the exception of Avignon. Gradually over the course of the early modern period, a situation, which from various viewpoints was extraordinary, developed as a result of differing circumstances. From the early decades of the sixteenth century, higher education teaching could already count on three university seats which enjoyed acknowledged prestige: Bologna, Roma and Perugia. These were joined in 1598, as a result of the territorial incorporation of the Duchy of Ferrara, by the *Studium generale* granted by Boniface IX to Alberto d'Este in 1391. Furthermore, in certain cities, teaching in law, philosophy or medicine was provided at schools by teaching staff paid by the local administration to provide preparatory courses for young people who would then complete their studies at a *Studium generale*.

⁷ W.Th. Frijhoff, *La société néerlandaise et ses gradués, 1575-1814*, Amsterdam, APA-Holland University Press, p. 34.

From the early decades of the sixteenth century, some of these schools, both over varying time periods and by various means, managed to acquire the privilege of awarding degrees to a predetermined number of graduates. Such a prerogative was generally conferred upon colleges – in law or medicine – which, by adopting the co-optation system in order to renew their teaching staff, and the function of such aimed at keeping control over, and bringing stability to the teaching staff. This privilege⁸, granted by Popes and Emperors to colleges in various Italian cities (such as Milan, Cuneo, Nice, Como, Cremona and Reggio Emilia), was also held by several cities of the Papal States, such as Cesena, Forlì, Rimini, Ravenna, Macerata, Urbino and Ancona.

The anomaly of papal Marca

In 1518, Macerata was given the right to award degrees to a predetermined number of graduates by Leo X and, in Urbino, *Collegium iuristarum* created in 1506 by Guidobaldo da Montefeltro won such a right in 1564 from Pius IV. Both cities were then able to transform this right into the privilege of founding a *Studium generale* (Macerata in 1540 and Urbino in 1671), and such a situation placed their colleges on an equal juridical footing with the more renowned universities. Even the college in Ancona managed to obtain an extension of its privileges from Pius IV in 1562 with the right to create a *Studium generale*, however, the city failed to meet requirements although it held the prerogative until 1739. As for the cities of Fermo and Camerino, both boasted remote historic origins: the former dated back to Boniface VIII (1303)⁹, while Camerino boasted a privilege granted by Gregory XI in 1377 following his return from Avignon¹⁰. In both cases, without entering into the merits of the effectiveness of such privileges, it has to be said that, in the Marca¹¹, there was no evidence of higher education teaching comparable with that of the Italian universities of the fourteenth and fifteenth centuries. Furthermore, it can be said that, until

⁸ C. Penuti, *Collegi professionali di giureconsulti con prerogativa di addottorare in area estense e romagnola*, in G.P. Brizzi, J. Verger (edd.), *Le università minori in Europa (secoli XV-XIX)*, Soveria Mannelli, Rubbettino, 1998, pp. 337-352.

⁹ G.P. Brizzi, *L'antica Università di Fermo*, Milano, Silvana editoriale, 2001.

¹⁰ D. Aringoli, *L'Università di Camerino*, Milano, Giuffrè, 1951; A. Bittarelli, *Privilegi alla università di Camerino e al suo rettore in un carteggio a Fortunato Savini, 1749-1753*, «Proposte e ricerche», vol. 19, 1987, pp. 40-50; P. L. Falaschi, *L'Università di Camerino*, in Brizzi, Verger (edd.), *Le università minori in Europa*, cit., pp. 129-151; Id., *Studium generale vigeat. Alle origini della Università di Camerino*, s.n.t., 2000.

¹¹ In this regard Boccaccio's severe judgment may be remembered: «Nella nostra città vegnono molto spesso rettori marchigiani, li quali [...] menan seco e giudici e notari, che paiono uomini levati più tosto dallo aratro o tratti dalla calzoleria, che delle scuole delle leggi» (G. Boccaccio, *Decameron*, giornata VIII, novella 5).

the mid-sixteenth century, it was the local further education colleges alone that were committed to maintaining a fragile provision of higher education. The antiquity of the date of origin of the universities became an area of conflict between the cities of Marca which had received the title of ‘major city’ or ‘great city’ from Cardinal Egidio Albornoz (1357) and, in order to confirm their role, referred to the *ab antiquo tempore* merits of their schools. Academic introductory speeches, chronicles and stories of individual universities were used in order to perpetuate their self-celebration: Macerata boasted that its university was so renowned that was considered a rival to Padua and even Paris for its quality of teachers; Fermo bestowed upon itself the attribute of ‘*Civitas studiis aptissima*’ and Gaspare Zoppio praised the new university as being the transfiguration of the schools of Athens¹²; Camerino declared itself «decorated with special privileges» and paraded «pontiff and imperial» concessions. When circumstances required, improbable genealogies were vaunted: Fermo traced the origins of its university to 824 and the actions of Bishop Lupo; Camerino did not exclude the possibility of even more remote origins with respect to the its status granted by Gregory XI and published certain controversial libels in which it derided Macerata’s claims to date its University back to Nicholas IV and the year 1290¹³. These controversies generally hid a desire for legitimisation and not by chance did moments of difficulty emerge when local funding crises imposed cuts in resources for teaching staff or when reductions in student numbers endangered a university’s survival.

To complete the picture of university institutes in the Papal States, it is necessary to recall not only the presence of the University of Urbino, created by Clement X in 1671 following inclusion of the Duchy in the Papal States¹⁴,

¹² Brizzi, *L'antica Università di Fermo*, cit., p. 11.

¹³ The origin of the universities of Macerata, Fermo and Camerino provoked an exchange of polemical pamphlets between Pirro Aurispa and a scholar of Camerino, first in Latin and then in Italian to facilitate the dissemination: P. Aurispa, *Praelectio anni 1777 amplissimo Maceratensium Senatui dicata a P.A. iureconsulto et in Gymnasio antecessore primario*, Macerata, B. Capitani, 1778 (see the oldest universities in Italy and in particular those of Macerata and Fermo); Id., *De initiis plurium Italiae academiarum et maxime in nostra Piceni provincia. Praelectio amplissimo Maceratensi senatui dicata*, Macerata, B. Capitani, 1778; Id., *Prefazione dell'anno 1777 ove espongonsi i principi delle più antiche università d'Italia e di quelle di Macerata e di Fermo dedicata allora ai Signori Maceratesi dal Signor P.A. nell'Università di Macerata professore primario ed ora all'occasione di alcune controversie tra alcuni maceratesi e camerinesi trasportata dal latino all'italiana favella con brevissima aggiunta o prolusione del traduttore*, Macerata, B. Capitani, 1780; [A. Lazzarini?], *Ragionamento dell'origine e prerogative della Città di Macerata in risposta a quanto si dice su tale articolo nella dissertazione apologetica storico-critica de'Camerti umbri in conferma e rischiaramento della lettera del cavalier maceratese*, Macerata, B. Capitani, 1780; [Id.?], *Estratto di proposizioni intorno alla Città di Camerino e suo antico ducato e marca contenute nella dissertazione apologetica-istorico-critica pubblicata in Camerino in risposta all'osservazioni del cavalier maceratese nel mese di luglio 1780 con critiche riflessioni a ciascheduna di esse*, Macerata, B. Capitani, 1780.

¹⁴ F. Marra, *Chartularium. Per una storia dell'Università di Urbino, 1563-1799*, Urbino, Argalia, 1975; F. Palma (ed.), *Urbino e la sua università*, Roma, Lucarini, 1989; S. Pivato (ed.),

but also the creation of two other academic institutes in Fano and Cesena. In Fano, a college created by Guido Nolfi, a high functionary of the Datary, had been in operation since 1680¹⁵. This had been founded as an institute for poor students which then accepted paying students attracted by the quality of teaching provided by the institute. On 25 February 1729, Benedict XIII conferred upon *Collegio Nolfi* the same privileges recognized for a *Studium generale* and two years later the emperor Charles VI recognized the validity of academic qualifications awarded by *Collegio-Università Nolfi* throughout the territories of the Empire. As for Cesena, it was the turn of Clement VII, in 1524, to grant the college the privilege of awarding two law degrees a year. This privilege was later widened and allowed students to graduate in philosophy and medicine. And with the founding of a college of theologians, Pope Pius VI, Giovanni Braschi, introduced two orders in 1793 and 1796 giving degrees awarded here status equal to those awarded by the major universities of the Papal States¹⁶.

Of the 'major' cities of papal Marca, only Ascoli failed to obtain the privilege of founding its own *Studium generale*. On 27 September 1732, in order to win the much-desired privilege, the city authority presented Clement XII with a lengthy petition listing its vaunted qualifications. Following the usual script adopted in similar cases, reference was made to the fact that the city had already hosted a university in the past. Nicholas IV, Girolamo Masci of Ascoli, had granted generous funding to this end and the statutes of 1382 committed the city to employing paid teaching staff. Then, in 1569, Pius V created a college of jurisconsults in Ascoli along the lines of the Macerata institute and, in its petition, Ascoli maintained that, likewise, its college should be able to award academic qualifications. However, due to local political troubles, its application had been long overlooked and the people of Ascoli called on the Pope to restore the old privilege and grant it as new (the formula *restitui vel institui* appeared in such petitions). More interesting still is the provision of education young people could enjoy in the city, because it demonstrates how widespread schools providing higher education were. In the local Jesuit College, students could receive lessons in logic, physics, metaphysics, moral theology, rhetoric, humanity, grammar and scholastic theology and there were two established courses in medicine, two in law and one in Holy Scripture. In the application put forward in 1732 to grant *Studio generale* status, it was assured that such

L'Università di Urbino, 1506-2006, vol. I: *La storia*; Vol. II: *I saperi fra tradizione e innovazione*, Urbino, Università degli Studi di Urbino "Carlo Bo", 2006.

¹⁵ M.L. Accorsi, *Catalogo dei laureati nel Collegio-Università Nolfi di Fano (1730-1824)*, «Annali di storia delle università italiane», vol. 6, 2002, pp. 229-242. During this period, the College Nolfi conferred 368 doctoral titles.

¹⁶ G.P. Brizzi, *Lo Studio cittadino*, in *Storia di Cesena*, 8 voll., Cesena-Rimini, Cassa di Risparmio di Cesena, 1982-1991, Vol. III: *La dominazione pontificia (secoli XVI-XVII-XVIII)*, a cura di A. Prosperi, Rimini, Bruno Ghigi editore, 1989, p. 231.

status would not jeopardise the Universities of Bologna and Macerata, which were well attended by students from Ascoli. However, Ascoli did not achieve its aim and neither did so in 1818 when a further attempt was made¹⁷.

The picture outlined so far illustrates the exceptional presence of universities in the Papal States. If at the beginning of the early modern period there were three, at the end of the 1700s there were ten. A case without equal in Europe at a time when on average there was one university for every 1,200,000 inhabitants, while in the Papal States the average fell drastically to one for every 250,000 and in Marca, the ratio was one for every 160,000 – 7.5 times greater than the European average.

Such an anomaly can be traced back to the contractual nature of the relationship between city oligarchies and the Pope. The request for, and concession of, *Studium generale* status came under the range of privileged relations which local patriciates enjoyed with the Pope. The non-dynastical nature of the papal monarchy greatly increased the opportunities for building relations with the Sovereign-Pontiff to the enormous benefit of local communities who took advantage of every opportunity in order to obtain favourable treatment.

Jesuit professors: inside and outside the universities

In order to complete the picture, consideration must be made of the presence of colleges belonging to the Society of Jesus. Their presence was important, if looked at in relation to the universities, since the Jesuits worked with university schools in a complementary role, and the Society had colleges in all the major cities of Marches¹⁸. The success of the curriculum drawn up by the *Ratio studiorum* of the Jesuits had a determining impact on the universities: they introduced a precise division between lower and higher education into their curricula, pre-empting the model introduced in the public school system during

¹⁷ Gemelli, Vismara, *La riforma degli studi universitari*, cit., p. 67.

¹⁸ On the role of the Jesuits in the field of higher education see: K. Hengst, *Jesuiten an Universitäten und Jesuitenuniversitäten. Zur Geschichte der Universitäten in der Oberdeutschen und Rheinischen Provinz der Gesellschaft Jesu im Zeitalter der konfessionellen Auseinandersetzung*, Paderborn-München, Schöningh, 1981; A. Scaglione, *The Liberal Arts and the Jesuit College System*, Amsterdam-Philadelphia, John Benjamins, 1986; G.P. Brizzi, *La présence et le rôle des collèges des jésuites en Italie*, in L. Giard (ed.), *Les jésuites et l'enseignement dans l'Europe de la Renaissance (XVI^e et XVII^e siècles)*. Actes du séminaire, Paris 23 novembre 1990, Paris, Presses universitaires de France, 1995, pp. 35-53; Id., *The Jesuits and Universities in Italy*, in H. Robinson-Hammerstein (ed.), *European Universities in the Age of Reformation and Counter Reformation*, Dublin, Four Courts Press, 1998, pp. 187-197; G.P. Brizzi, R. Greci (edd.), *Gesuiti e università in Europa (secoli XVI-XVIII)*. Atti del Convegno internazionale di studi, Parma 13-15 dicembre 2001, Bologna, Clueb, 2002; O. Condorelli, *Il diritto accademico della Compagnia di Gesù (secolo XVI)*, in Brizzi, Mattone, *Le origini dello Studio generale sassarese*, cit., pp. 219-250.

the Napoleonic era, which in turn pre-empted the nineteenth-century division of education into high school and university. Even the division into classes with their precise and progressive corresponding cognitive content, whose acquisition was guaranteed by a series of examinations, became common practice in the teaching system and was adopted as a key principle in eighteenth-century school reform. From the latter years of the sixteenth century, teaching in Jesuit colleges incorporated the teaching of grammar, the humanities and rhetoric which were already components of university teaching. This had a major impact on student numbers and make-up, and the slight drop in university student numbers recorded during the early modern period was in part due precisely to changes made to the school curriculum, that is to the foundation of more highly attended courses outside universities, which were precisely those of the arts faculties.

Differently to the traditional universities, the Jesuit colleges did not limit themselves to teaching: the apostolate of the Jesuits, responsible for the running of the colleges, carried out their work in various areas and in various forms, often in an integrated fashion. For its close tie with teaching, I will refer to just the one example, and that is how the most important colleges were the centre point of intense scientific research activity. As of yet no in-depth study of the human and financial resources the Society invested in its scientific research has been made, but the Sommervogel catalogue¹⁹ of written works provides an immediate idea of how intense this work must have been.

Having provided a general overview, we now turn our attention to colleges operating in the Marca region. The first college dates back to 1554 in Loreto, «the second eye of Italy and of the apostolic seat», wrote Polanco, friend and biographer of Ignazio de Loyola. It was, therefore, a choice of an eminently pastoral nature in relation to the large numbers of pilgrimages to the *Santa Casa*. Still in Loreto, in 1581, *Collegio Illirico* was entrusted with the duty of training



Pic. 2. Giacomo A.F. Ghirardelli's degree certificate, Macerata, 1716 August 13th (private collection).

¹⁹ C. Sommervogel, P. Bliard, *Bibliothèque de la Compagnie de Jésus*, voll. 12 (réimpr.), Hévelré-Louvain, 1960.

the clergy that would go on to work on the opposite shore of the Adriatic. In 1561, it was the turn of Macerata: here, upon request of the municipal administration, the Jesuits established themselves, thus causing some perplexity among academic staff who were fearful of the teaching role the Jesuits would carry out. Even in Recanati they opened public schools in 1578, and later it would be the turn of Potenza Picena and Ancona. During the seventeenth century, colleges were founded in Fermo, Fano, Ascoli and Fabriano. In the eighteenth century, the region had not only five universities, but also ten Jesuit colleges, in eight of which public schools operated.

In 1600, the Jesuits working in teaching²⁰ totalled just seven spread over three colleges²¹; in 1650 there were 22 in six colleges²²; in 1700, 27 in 8 colleges²³, and in 1750 there were 29 in 7 colleges²⁴. It is to be underlined that the vast majority of these teachers were employed in the teaching of logic, physics, metaphysics, scholastic theology, morals, and Holy Scripture. In 1700, 63% of the Jesuit teaching staff taught a subject on the higher education courses, and in 1750 this had risen to 70%.

The teaching roles of the Society's teaching staff were largely concentrated on philosophical subject areas (among which were included physics and mathematics) as well as theological subjects. They were, therefore, complementary to those carried out by university teaching staff, which were mainly in the legal and medical areas. If in the cases of Macerata²⁵ and Fermo their teaching was expressly coordinated with that carried out in the universities, in the cases of Ascoli and Ancona the Society provided teaching in the absence of a public *Studium generale*.

Towards a secondary university

Is it possible to draw a picture of minor universities before Italian unification, before the introduction of a league table of universities on the basis of their scientific performance, or on the basis of the number of students enrolling? That is, is it possible to identify structural shortcomings in their history which impeded development, bringing about a silent death, or that did not prevent

²⁰ G.P. Brizzi, *Università e collegi marchigiani in età moderna*, «Quaderni del Consiglio regionale delle Marche», vol. 30, 2000, p. 29.

²¹ Recanati (2), Ancona (2), Macerata (3).

²² Ancona (2), Recanati (2), Ascoli (2), Loreto (2), Macerata (6), Fermo (8).

²³ Ancona (3), Recanati (2), Ascoli (4), Loreto (2), Fabriano (1), Macerata (6), Fermo (8), Potenza Picena (1).

²⁴ Ancona (4), Ascoli (5), Loreto (2), Fabriano (2), Macerata (6), Fermo (9), Potenza Picena (1).

²⁵ W. Angelini, *Portata della cultura del collegio dei gesuiti a Macerata (1561-1773)*, «Studi maceratesi», vol. 35, 2001, pp. 183-222.

them from being downgraded to *liceo* or *ginnasio* (secondary school) status in the Napoleonic era, or from being relegated to the status of a second division or *libera* university after 1861?

In the history of the university it was not uncommon to see university schools disappear or survive on paper after a short-lived existence, such as in the cases of Vercelli, Arezzo and Lucca, or – as in the case, for example, of Parma – to see universities go slowly into decline and disappear, only later to be re-established in a programme which was able to rely on a new and more solid political role enjoyed by their host city. The university-city tie was apparent in the case of the universities of Marca, both for what cities possessing a *Studium* represented in the administrative order of the Papal States and for the chances of their being able to count on the patronage of a pontiff having personal ties with the city. These were factors and circumstances that could alter over time, jeopardizing the solidity and the permanence of the *Studium* if conditions guaranteeing a competitive provision of teaching and stable funding were not created. For the scholars at the time who described the *orbis academicus*, the notion of minor universities or, it can be said, of second rate universities, was certainly real. Jacob Middendorp²⁶ who, towards the end of the sixteenth century, made a review of European universities, mentioned only the existence of a high school in Macerata and ignored all other cultural institutes present in Marca. However, it was different in the case of Carlo Emanuele Fontana²⁷, who listed institutes providing higher education in Italy at the end of the 1600s, and not only universities but also the most important Jesuit Colleges, the *seminaria nobilium*, the colleges for scholarship holders. As a result, alongside the universities of Urbino, Fermo and Macerata, he noted the presence of *Collegio Nolfi* in Fano²⁸. Fontana was a courtier, interested in providing a picture of educational institutes without introducing criteria of a juridical nature. This was not the case with Jacopo Beni²⁹ who, at the start of the 1600s, divided universities into two classes: the first group included Bologna, Roma, Padua, Pavia, Turin, Pisa, Ferrara, Siena, Naples, Macerata, Fermo, Salerno and Perugia, but excluded those whose teaching lacked continuity and provided insufficient ranges of courses. At the end of the seventeenth century, Francesco Domenico Brancaccini³⁰ realised, instead, the need to go beyond the juridical

²⁶ J. Middendorp, *Academiarum universi terrarum orbis libri tres*, Colonia, Cholinus, 1602, Vol. IV, p. 94.

²⁷ C.E. Fontana, *La nobile e virtuosa Italia mostrata in epilogo e dedicata all'altezza Dorotea Sofia*, Parma, G. Rossetti, 1696, pp. 85-89.

²⁸ «In this city there is a college supported through the inheritance of a certain gentleman of Casa Nolfi, with the condition that here not only should a certain number of young noblemen be maintained, and when their numbers are low, young men from the Diocese; but moreover, it is comfortable for study and even more so for the salaried graduates» (*ibid.*, p. 87).

²⁹ J. Beni, *De privilegiis iurisconsultorum liber in tres partes divisus*, Venice, M. Polo, 1602, pp. 9-11.

³⁰ D. Brancaccini, *De jure doctoratus libri IV*, Roma, N.A. Tinassi, 1689.

nature of the *Studium generale*, which was the criterion adopted by Jacopo Beni, and to assess also whether the number of courses provided covered all subjects, including the arts. Of the universities in his time, he identified only four – Bologna, Padua, Pisa, Perugia – which he included in the top category: universities *perfectissimae*. The universities classified as ‘perfect’ were all the other universities which, despite being capable of teaching all disciplines (literary, philosophical, medical, juridical and theological), for some reason, usually due to a lack of funds, they provided an insufficient number of courses. In the third category, that of ‘imperfect’ universities, were those schools which provided only a limited number of higher education courses, and not on a continuous basis, and were not allowed to confer academic qualifications. Although they were not listed, Marca universities were in reality recognised as being in the category of ‘perfect’ universities, that is universities legitimised by a privilege with universal value, incapable, however, of exerting their influence beyond the region and forced, for economic reasons, to offer a reduced teaching programme, delegating certain courses externally.

However, among the Marca universities there were differences that should not be overlooked: Macerata and Fermo were undoubtedly those able to maintain their status over the longer term. Their developments shared a lot in common: in their early years, in order to draw attention towards the new universities, they recruited renowned teachers from the major universities of the time but, very soon, in order to control spending, teaching was entrusted to teachers from the local area. Fundamental in ensuring the stability of teaching provision was undoubtedly the presence of the Jesuits who, having important colleges in both cities, assigned their teaching staff to cover teaching in the literary, philosophical and scientific fields. Being independent of the *Studium generale*, they carried out a complementary function with regard the teaching carried out in the university. Their role was regulated through precise accords with the governments of both cities and, despite not being part of the university teaching staff, they received a percentage of the fees paid by newly graduated students. The two universities carried out an important role in the region: the average number of degrees awarded annually was 20 in Fermo and 19 in the case of Macerata, although certainly inferior to the 50 awarded every year in Bologna. Even more important is to consider the geographical area of origin of the students, which provides a measure of the modest credit given the two universities. The vast majority came from the urban areas of the Marca region and, to a lesser degree from the Papal States, while students coming from other Italian states or abroad comprised an extremely low number. The Marca universities’ decline is most evident in the second half of the seventeenth century: setting the number of graduates at 100 in 1650, the phenomenon appears particularly evident³¹:

³¹ The data are derived from: Brizzi, *L'antica università di Fermo*, cit.; Serangeli, *I laureati*

	Fermo	Macerata
1650-1699	100	100
1700-1749	72	69
1750-1799	33	33

The history of these two universities appears in many respects similar also in the measures adopted in order to seek to halt the decline, and which often had the effect of making it worse. In an attempt to attract students, they aimed at impressing the public by flaunting true or presumed *enfants prodiges*³², a phenomenon much talked about in those times. They allegedly enrolled young polyglots who became expert in writing literary works and others expert in mathematics or physical sciences. In 1748, a ten-year-old boy, Gregorio Spinucci, graduated from Macerata with a double degree in civil and canonical law (*in utroque iure*). However, the result was not what the promoters of the event had hoped for. Benedict XIV reacted strongly, defining the degree as a nonsense which ridiculed «the dignity of graduates and the University itself», and threatened to remove the privilege to award academic qualifications from the *Studium generale* of Macerata. In order to demonstrate the extraordinary qualities of their students, the Universities resorted to awarding multiple degrees. If it is not surprising that a student could, on the same day, sit the exam to graduate in philosophy and theology, or in philosophy and law, then markedly different was the case of those who, such as D. Morichi, P. Aurispa, A. Pellicani, G. Pellicani, G. L. Flaviani, G. Costa, and M. Lazzarini³³, by sitting a single examination, graduated in *utroque iure*, philosophy, medicine and theology; moreover, 99 graduated in *utroque iure*, philosophy and theology. Following the suppression of the Society of Jesus, it became more difficult to maintain the quality and number of courses which were often assigned to teachers with no assessment of their teaching experience and skills. It is significant that, both in Bologna and Rome, institutes were created to host students from the Marches region: *Collegio Montalto*, much desired by Sixtus V, in Bologna (1586) and *Collegio Piceno* in Rome (1643)³⁴. The former took in 1316 students from the region who were studying at Bologna University, of which 737 gained degrees³⁵, and from *Collegio Piceno*, too, young people went on to take up important public positions.

As it has been seen, the premises for a revision of Macerata's role in higher education began to appear in the late seventeenth century. However, it was with the change in the political scene that the decline of the University of Macerata

dell'antica università di Macerata, cit.

³² M. Sacquin, E. Le Roy Ladurie (edd.), *Le printemps des génies. Les enfants prodiges*, Paris, Bibliothèque nationale-R. Laffont, 1993.

³³ Serangeli, *I laureati dell'antica università di Macerata*, cit.

³⁴ *I Piceni oggi. Il Pio Sodalizio dei Piceni dal 1600 al 2000*, Roma, Biblioteca del Pio Sodalizio, 1996, pp. 45 ss.

³⁵ See: <http://asfe.unibo.it/it/onomasticon_studii_bononiensis> (last access: September 27th, 2013).



Pic. 3. Poem on the occasion of the graduation of G.F. Castracani, Macerata (Bologna, University Archive).

was such as to lead to its being downgraded to high school status (1808). The restoration of university status, the pursuit of which began from 1815 onwards, found favour with the ecclesiastic government, even though Macerata was included among the secondary universities³⁶. In order to emancipate itself from such a position, it would take the combined efforts of the city and university lasting more than a century.

³⁶ F. Gasnault, *La réglementation des Universités pontificales au XIX siècle*, «Mélanges de l'Ecole française de Rome. Moyen Age-Temps modernes», vol. 96, 1984, pp. 177-237; D. Cecchi, *Il liceo napoleonico del Dipartimento del Musone (1808-1815)*, «Rivista di storia del diritto italiano», vol. LX, 1987, pp. 139-178; R. Boudard, *Expériences françaises de l'Italie napoléonienne. Rome dans le système universitaire napoléonien et l'organisation des Académies et Universités de Pise, Parme et Turin (1806-1814)*, Roma, ed. Ateneo, 1988; P. Alvazzi Del Frate, *Università napoleoniche negli "Stati romani". Il Rapport di Giovanni Ferri de Saint-Constant sull'istruzione pubblica (1812)*, Roma, Viella, 1995.

Le Università minori. Considerazioni storiografiche, discutendo due recenti volumi sulla storia dell'Università di Macerata¹

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The minor universities. Historiographical considerations, discussing two recent books on the history of the University of Macerata

ABSTRACT: The two recent books on the University of Macerata offer a contribution for identifying the role of minor universities in Italy at the turn of the 19th and the 20th centuries. We consider the legislative profile, the relationship centre-periphery, the association city-nation, cornerstone of the unitary Italian state and of the polycentric university system. Attention is also given to the presence of a single faculty in Macerata, Law School, and to the limits and opportunities for Macerata in the century of the legal profession.

EET/TEE KEYWORDS: University; History; Education System; Italy; XX Century.

Nel 1993 Mario Da Passano presentava un primo volume sulle «università minori nel XIX secolo» con un'indicazione di metodo, che merita di essere ricordata: «oltre la questione sintetizzabile nella formula quale università per quale società, andrebbe anche affrontato il problema di come l'Università italiana, pur con tutti i suoi squilibri e le sue diverse articolazioni, abbia comunque inciso nella vita culturale e civile del paese, al di là dello scarto tra

¹ L. Pomante (ed.), *L'Università di Macerata nell'Italia unita (1861-1966). Un secolo di storia dell'ateneo maceratese attraverso le relazioni inaugurali dei rettori e altre fonti archivistiche e a stampa*, Macerata, eum, 2012; L. Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, Macerata, eum, 2013. Queste pagine aggiungono alcune note alle considerazioni svolte in occasione della presentazione dei volumi, tenutasi a Macerata il 27 Novembre 2013.

processi politici e realtà». Da Passano coglieva che tematizzare il legame tra «Università e crescita culturale e civile del paese» faceva saltare la connotazione «maggiore»/«minore», con la seconda declinata come *status* di minorità; invece – nelle parole del compianto storico del diritto – «certe unità marginali e periferiche molto spesso hanno però salde radici nelle società locali e stretti rapporti con le loro istituzioni»².

Il volume era pubblicato a Sassari, città che per prima poneva al Regno d'Italia il problema delle Università minori; come è noto, la legge Casati prevedeva la soppressione di quell'ateneo, disposizione disattesa per l'opposizione ferma delle istituzioni locali, che, tra l'altro, trovavano un portavoce di rilievo in Pasquale Stanislao Mancini, deputato del collegio e grande giurista³. Il caso Sassari faceva da apripista al futuro: alla tendenziale razionalizzazione del sistema per via riduzionista – una «politica universitaria» nazionale che iniziava nel 1848, come ha mostrato Simonetta Polenghi⁴ – i destinatari dell'abolizione opponevano le «salde radici». Il nodo era già chiaro nei contributi di Ilaria Porciani e Mauro Moretti – presenti nello stesso volume di vent'anni fa – che ricostruivano la storia della legislazione, o dei tentativi di legislazione, dal prevalente, seppur non esclusivo, angolo visuale del rapporto Stato/realtà locali⁵. Prospettiva che comunque non esauriva i tanti profili, culturali e sociali, delle Università minori, e del grande dibattito che esse suscitarono in Italia tra Ottocento e Novecento, come mostra la *Bibliografia* curata dagli stessi Porciani e Moretti. Da subito le sedi che si sentivano minacciate dai ricorrenti tentativi di abolizione rispondevano con le parole d'ordine «conservare e completare»⁶, giustificate, tra l'altro, dall'aspirazione a formare una classe dirigente locale.

² M. Da Passano, *Introduzione*, in Id. (ed.), *Le Università minori in Italia nel XIX secolo*, Sassari, Centro interdisciplinare per la storia dell'ateneo di Sassari, 1993. Sul compianto storico del diritto cfr. ora A. Mattone, *Da Passano, Mario*, in I. Bircocchi, E. Cortese, A. Mattone, M.N. Miletto (edd.), *Dizionario biografico dei giuristi italiani*, Bologna, il Mulino, 2013, pp. 649 ss.

³ G. Fois, *L'Università di Sassari tra Ottocento e Novecento*, in Da Passano (ed.), *Le Università minori in Italia nel XIX secolo*, cit., pp. 81-100.

⁴ S. Polenghi, *La politica universitaria italiana nell'età della Destra storica (1848-1876)*, Brescia, La scuola, 1993.

⁵ I. Porciani, *La questione delle piccole Università dall'unificazione agli anni Ottanta*; M. Moretti, *La questione delle piccole università dai dibattiti di fine secolo al 1914*, in Da Passano (ed.), *Le Università minori in Italia nel XIX secolo*, cit., rispettivamente pp. 9-18 e 19-44. Cfr. inoltre M. Moretti, *Piccole, povere e «libere»: le università municipali nell'Italia liberale*, in G.P. Brizzi, J. Verger (edd.), *Le Università minori in Europa (secoli XV-XIX)*, Soveria Mannelli, Rubbettino, 1998, pp. 533-562; M. Moretti, *Sulla geografia accademica nell'Italia contemporanea (1859-1962)*, in L. Blanco, A. Giorgi, L. Mineo (edd.), *Costruire un'Università. Le fonti documentarie per la storia dell'Università degli Studi di Trento*, Bologna, il Mulino, 2011, pp. 59-100; M. Moretti, I. Porciani, *Da un frammento a un testo. Estate 1859, la discussione preparatoria sulla legge Casati*, in A. Ferraresi, E. Signori (edd.), *Le Università e l'Unità d'Italia (1848-1870)*, Bologna, Clueb, 2012, pp. 15-34.

⁶ Cfr. la voce *Università minori*, e temi collegati nell'*Indice analitico*, in I. Porciani, M. Moretti (edd.), *L'Università italiana. Bibliografia. 1848-1914*, Firenze, Leo S. Olschki, 2002.

A proposito di costruzione del sistema universitario all'indomani dell'Unità di recente i due studiosi hanno scritto di «vittoria delle periferie»⁷.

Ad integrazione dell'abbondante storiografia sulle università maggiori, alle minori in Europa nel 1996 era dedicato un Convegno internazionale, con oltre sessanta comunicazioni. Da qui un corposo volume, che non affrontava il solo secolo XIX, quando la questione acquistava grande visibilità; inseguiva fin dal secolo XV le peculiarità delle varie sedi universitarie, da ricondurre al termine concetto «minore», che si presentava ancor più problematico, se considerato in una prospettiva europea e nella lunga durata. Nella *Presentazione* Gian Paolo Brizzi e Jacques Verger tracciavano una tipologia, che escludeva il nesso piccola città/piccola università, e rifiutava di guardare all'ateneo *minore* dalla prospettiva del fallimento nel divenire *maggiore*. Si prospettavano anzi la vocazione o la scelta della singola sede di restare di dimensioni contenute, nel numero degli studenti, dei docenti, delle Facoltà⁸.

Pertanto, tra «identità ed autoconsapevolezza», Brizzi definiva il cuore vitale di università delle quali era necessario fare una storia in positivo, di contro al difensivismo, al canone dell'«ateneo minacciato», che Ilaria Porciani aveva coniato per Siena⁹, ma che può essere esteso alle vicende di altre sedi. Dai tanti contributi de *Le università minori in Europa* risaltava dunque una «costellazione» di realtà universitarie, la cui sorte si legava alla storia dello «Stato moderno» – di complessa definizione¹⁰ – del rapporto tra Stati moderni e Chiesa, prima e dopo la Riforma, del legame tra atenei e Accademie, Collegi, Scuole private, 'semi-università', fino al *turning point* delle politiche universitarie di Napoleone. Non a torto la storia costituzionale di Piero Schiera ha letto nell'incrocio tra Università e società un «nodo strutturale della storia moderna»¹¹.

Non si legge un saggio specificatamente dedicato alle università minori nei tre densi volumi della *Storia delle Università in Italia*, pubblicati nel 2007 per la cura di Gian Paolo Brizzi, Piero Del Negro e Andrea Romano. D'altro canto le persistenti peculiarità di questi particolari atenei emergevano nelle trattazioni

⁷ I. Porciani, M. Moretti, *La creazione del sistema universitario della nuova Italia*, in G.P. Brizzi, P. Del Negro, A. Romano (edd.), *Storia delle Università in Italia*, 3 voll., Messina, Sicania, 2007, Vol. I, p. 332.

⁸ G.P. Brizzi, *Presentazione*, in Brizzi, Verger, *Le Università minori in Europa (secoli XV-XIX)*, cit., pp. 5-9; Id., *Le Università minori in Italia in età moderna*, in A. Romano (ed.), *Università in Europa: le istituzioni universitarie dal Medioevo ai nostri giorni, struttura, organizzazione, funzionamento*, Soveria Mannelli, Rubbettino, 1995, pp. 287-296.

⁹ I. Porciani, *Un ateneo minacciato: l'Università di Siena dall'Unità alla prima guerra mondiale*, «Annali della Facoltà di lettere e filosofia dell'Università degli studi di Siena», vol. XII, 1991, pp. 97-130; vol. XIII, 1992, pp. 271-288.

¹⁰ Cfr. almeno M. Fioravanti (ed.), *Lo Stato moderno in Europa. Istituzioni e diritto*, Roma-Bari, Laterza, 2002.

¹¹ P. Schiera, *Università e società come nodo strutturale della storia moderna*, in A. Mazzacane, C. Vano (edd.), *Le professioni giuridiche in Europa nell'età liberale*, Napoli, Jovene, 1994, pp. 31-49.

dedicate al governo dell'istituzione, all'insegnamento, alla presenza di docenti e studenti, al rapporto con la città e con lo Stato. Un dato mi sembra da rilevare: le sedi, che pur avevano alle spalle una radicata conformazione preunitaria, nel passaggio al Regno d'Italia si adeguavano senza troppi traumi alla nuova realtà costituzionale¹². Del resto il mondo universitario era da tempo protagonista del processo risorgimentale e dell'unificazione¹³; dal policentrismo universitario della Restaurazione, corollario di quello politico degli antichi Stati, si approdava alla nazionalizzazione dell'istruzione superiore, che non vedeva nel 1861 un punto di approdo, ma che sarebbe stata leggibile nei decenni successivi, pur in una «storia a velocità diverse»¹⁴.

Non pare dunque pensabile un modello «astratto» di Università minore, scollegato dai diversi contesti politici, che nel tempo gli hanno dato senso¹⁵; così come la comparazione tra il sistema universitario italiano e quello francese e tedesco¹⁶ ha fatto emergere le peculiarità del caso Italia. Mi pare che si collochi in questa prospettiva storiografica il libro di Pomante; un grande merito della ricerca è quello di avvalersi delle fonti archivistiche, oltre che a stampa, nella consapevolezza che è quel tipo di documentazione a dare senso al ruolo svolto dall'ateneo nella storia della città e dello Stato nazionale¹⁷. Ma qual era, e qual è, il criterio per connotare le «università minori»? Sgombrato il campo dalla «inerzia dei luoghi comuni» – come fa Brizzi nella densa *Presentazione*¹⁸ – mi sembra che sia possibile ricostruire il ruolo assolto da quei particolari atenei dalla prospettiva della definizione giuridica, offerta dalle norme e dai progetti di assetto dell'istruzione superiore.

Il legislatore nazionale non era peraltro l'attore principale in un sistema universitario che vedeva protagonisti ora il Consiglio di Stato, ora la Corte dei Conti; la scelta centralistica della normazione – tanti Regolamenti e poche leggi, costante più generale dell'esperienza di governo nazionale¹⁹ – conviveva col

¹² Cfr. in particolare Brizzi, Del Negro, Romano (edd.), *Storia delle Università in Italia*, Vol. III.

¹³ Con riferimento specifico all'Università di Siena, ma anche per indicazioni sul mondo universitario in generale come motore del Risorgimento nazionale cfr. D. Cherubini, *Stampa periodica e Università nel Risorgimento: giornali e giornalisti a Siena*, Milano, Franco Angeli, 2012; sugli studenti in particolare cfr. A. Arisi Rota, *La gioventù delle Università come avanguardia politica: per una fenomenologia dello studente patriota*, in Ferraresi, Signori (edd.), *Le università e l'Unità d'Italia (1848-1870)*, cit., pp. 281-290.

¹⁴ A. Ferraresi, E. Signori, *Presentazione*, in Ferraresi, Signori, (edd.), *Le Università e l'Unità d'Italia (1848-1870)*, cit., p. X.

¹⁵ P. Del Negro, *Conclusioni*, in *Le Università minori in Europa*, cit., pp. 925-928.

¹⁶ B. Von Rudiger, *Il modello tedesco: Università e Bildungsbürgertum*, in I. Porciani (ed.), *L'Università tra Otto e Novecento: i modelli europei e il caso italiano*, Napoli, Jovene, 1994, pp. 37-59; V. Karady, *Universities and Nation States*, in Ferraresi, Signori (edd.), *Le Università e l'Unità d'Italia (1848-1870)*, cit., pp. 1-13.

¹⁷ Sull'importanza degli studi su fonti archivistiche cfr. L. Sitran Rea (ed.), *La storia delle università italiane: archivi, fonti, indirizzi di ricerca*, Trieste, Lint, 1996.

¹⁸ G.P. Brizzi, *Presentazione*, in Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., pp. 9-16.

¹⁹ F. Colao, L. Lacchè, C. Storti, C. Valsecchi (edd.), *Perpetue appendici e codicilli alle leggi*

coinvolgimento di enti e istituzioni, a dare sostanza al ruolo cruciale di *Nation building*, che il ceto politico liberale assegnava all'Università. Da sottolineare che il centralismo, che vedeva nel Ministero il motore dell'attività di governo degli atenei, si coniugava, nonostante la contraddizione, con i miti culturali dell'autonomia e della libertà d'insegnamento. Questi cardini dell'Università liberale erano destinati a dare senso alla vita scientifica delle Facoltà, che, al di là del riconoscimento legislativo, o sfruttando i margini della legislazione, sapevano darsi una sorta di «governo dei dotti»²⁰.

Il diritto è stato dunque strumento per costruire un'identità delle università, anche di quella di Macerata. Al proposito Pomante cita un docente illustre, il costituzionalista Gaetano Arangio Ruiz: «Le Università di Camerino e di Urbino chiesero di diventare libere e ottennero i rispettivi decreti [...] l'Università di Macerata non chiese un tale battesimo di libertà, era di Stato, di Stato voleva rimanere. Lo Stato, però, ad opera degli uomini preposti al governo, la abbandonava a sé stessa, riconoscendola come suo istituto quando gli conveniva [...] fingendo di ritenerla università governata dalla bolla *Quod divina sapientia*, non già dalle leggi italiane». Per Arangio Ruiz – che si faceva anche storico dell'ateneo in quella che chiamava l'«epoca moderna (1808-1906)» – l'Università di Macerata era «mezzo governativa e mezzo comunale, essere ibrido venuto fuori da chissà quale innaturale connubio, allorché si trattava di far fronte ai suoi bisogni finanziari»²¹.

Era dunque questa imprecisata identità giuridica a determinare l'incerto destino della sede marchigiana, complicata – come mostra Pomante – dal complesso rapporto tra Stato e Chiesa all'indomani dell'Unità²². Nel volume un primo «problema» risiede nella mancata estensione, come per altri atenei, della legge Casati; l'unificazione/uniformazione giunge nel 1862 col Regolamento Matteucci, peccato originale nella distinzione tra primarie e secondarie, quest'ultime discriminate dal non essere complete, dall'aver docenti retribuiti in misura minore rispetto a quelli delle primarie, incapacitate a formulare piani di studio. Nell'ex Stato della Chiesa si mantenevano le libere; Macerata si vedeva privata delle peraltro esangui Facoltà di Medicina e Filosofia per carenza dei requisiti di legge. L'ateneo non era comunque ricompreso tra quelli governativi; lo diveniva nel 1873, restava di secondo ordine, ed era dotato di una sola Facoltà, Giurisprudenza. Con le università secondarie quella di Macerata condivideva

italiane. Le circolari ministeriali, il potere regolamentare e la politica del diritto in Italia tra Otto e Novecento, Macerata, eum, 2011.

²⁰ Sia consentito di rinviare a F. Colao, *La libertà d'insegnamento e l'autonomia nell'Università liberale. Norme e progetti per l'istruzione superiore in Italia (1848-1923)*, Milano, Giuffrè, 1995.

²¹ Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., p. 100. Sul costituzionalista anche per indicazioni cfr. ora E. Pelleriti, *Arangio Ruiz, Gaetano*, in Birocchi, Cortese, Mattone, Miletto (edd.), *Dizionario biografico dei giuristi italiani*, cit., pp. 90 ss.

²² Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., pp. 47 ss.

la vicenda dei Consorzi e dei pareggiamenti – ricostruita accuratamente da Pomante – che si chiudeva nel 1902, attivo protagonista il rettore, il grande giurista Oreste Ranalletti²³.

Nel tempo i capi dell'ateneo sono stati attori decisivi nel rapporto con gli enti locali e col Ministero, come dimostra anche un recente contributo di Ninfa Contigiani su Luigi Pianesi²⁴; opportunamente Roberto Sani²⁵ si sofferma sull'importanza delle *Relazioni* dei rettori – spesso, come dimostrano i medaglioni, maestri nei rispettivi ambiti disciplinari²⁶ – rivolte al governo ma anche alla città, e che consentono di leggere in filigrana la storia universitaria locale e generale – dalle politiche legislative, ai problemi della docenza e della popolazione studentesca – nel mutare degli anni e delle stagioni legislative. Ad esempio risulta che l'esonero dalle tasse universitarie aveva attratto a Macerata un grande numero di studenti, provenienti anche da fuori regione; il progressivo abbandono della scelta, nonostante gli sforzi degli enti locali, cessava di favorire le sorti dell'ateneo marchigiano, con la drastica diminuzione della popolazione studentesca rispetto agli anni precedenti²⁷.

Si voleva forte di questa situazione di fatto l'opzione abolizionista, iscritta nel noto progetto Martini, basato anche sulle (discusse) Statistiche di Ferraris; come altre minori, l'università di Macerata era espressamente abolita. Come è noto, sulla proposta legislativa ebbe la meglio il peso delle «cento città», di cui ha scritto anche Roberto Sani, presentando l'*Annale* dedicato all'ateneo marchigiano²⁸. Del resto nelle «retoriche dei giuristi», come in quelle di altri intellettuali, la genesi del Regno era riposta nel binomio città-nazione, fondativo della dimensione costituzionale nazionale²⁹, il sistema policentrico conviveva senza contraddizione col celebre interrogativo del De Sanctis, «Ma cosa è lo Stato?, lo Stato si chiama Università»³⁰.

²³ *Ibid.*, pp. 114-132. Su Ranalletti cfr. B. Sordi, *Ranalletti, Oreste*, in Birocchi, Cortese, Mattone, Miletto (edd.), *Dizionario biografico dei giuristi italiani*, cit., pp. 1652 ss.

²⁴ N. Contigiani, *Luigi Pianesi (1809-1878)*, in S. Borsacchini, G.S. Pene Vidari, *Avvocati che fecero l'Italia*, Bologna, il Mulino, 2011, pp. 525-534.

²⁵ R. Sani, *Introduzione. Le Relazioni annuali dei rettori per la inaugurazione degli anni accademici. Una fonte preziosa per la storia delle Università*, in Pomante (ed.), *L'Università di Macerata nell'Italia unita (1861-1966). Un secolo di storia dell'ateneo maceratese attraverso le relazioni inaugurali dei rettori e altre fonti archivistiche e a stampa*, cit., pp. 25-77.

²⁶ Pomante (ed.), *L'Università di Macerata nell'Italia unita (1861-1966). Un secolo di storia dell'ateneo maceratese attraverso le relazioni inaugurali dei rettori e altre fonti archivistiche e a stampa*, cit.

²⁷ *Ibid.*, pp. 147-151; Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., pp. 117-119.

²⁸ R. Sani, *Presentazione. L'università degli studi di Macerata*, «Annali di storia delle università italiane», n. 13, 2009, pp. 51-54.

²⁹ Cfr. ora G. Cazzetta (ed.), *Retoriche dei giuristi e costruzione dell'identità nazionale*, Bologna, il Mulino, 2013.

³⁰ Il noto discorso alla Camera del 1° Luglio 1864 ora anche F. Ferri (ed.), F. De Sanctis, *Il mezzogiorno e lo stato unitario, Scritti e discorsi parlamentari dal 1862 al 1870, III. La situazione politica alla metà del 1864*, Torino, Einaudi 1960, pp. 183-219, in partic. p. 209. Il passaggio

La storia dell'Università di Macerata seguiva quella nazionale: di fronte alle agitazioni studentesche della metà degli anni '90 nel discorso pubblico le sedi meno affollate divenivano una risorsa per l'ordine degli studi. Non a caso – come sostiene Sani – nelle *Relazioni annuali* i rettori, anche in controtendenza rispetto alla società, mostravano una «ossessione» per la «disciplina e studi rigorosi», garantiti da un «piccolo ateneo di provincia». Maestri come Ranelletti e Arangio Ruiz avevano buon titolo per pretendere dagli studenti «giusto rigore» in vista della «selezione dei migliori»; le statistiche degli esami superati confermavano le prese di posizione di quei docenti e rettori³¹. La «linea rigorista» non era peraltro in contraddizione con la parola d'ordine «estensione», che scalzava la precedente «soppressione». Le scelte di politica universitaria d'Europa e degli Stati Uniti parevano confortare il senso delle sedi minori, il cui prestigio scientifico non aveva niente da invidiare agli atenei più grandi e affollati; al proposito Pomante si sofferma sulle note pagine di Schiappoli circa la «strana leggenda quella delle Università minori»³².

Un profilo della storia dell'ateneo maceratese mi è parso di grande interesse: Pomante ha saputo cogliere i problemi, ma anche le opportunità, offerte dalla presenza di un'unica Facoltà, quella di Giurisprudenza, che rilasciava anche il diploma di specializzazione per la professione di procuratore e notaio. Da sempre la giustizia aveva come elemento costitutivo l'essere *anima civitatis*, la dimensione *costituzionale*; Mario Sbriccoli ha indicato con pagine memorabili la grande capacità comunicativa delle sue rappresentazioni³³. In questo orizzonte Roberto Sani ricostruisce e offre senso all'allegoria affrescata in Aula magna, il «monumento», cardine della «pedagogia della tradizione»³⁴. Anche quell'affresco ricorda che Macerata aveva l'esclusiva nel formare laureati che, forti della loro specifica identità disciplinare, sarebbero stati attori decisivi della costruzione dello Stato nazionale, mediatori tra Stato e società civile, protagonisti in Parlamento e nei governi³⁵. Non a torto dalla chiave di lettura

era posto in epigrafe già da M. Moretti, I. Porciani, *Università e Stato nell'Italia liberale. Una ricerca in corso*, «Scienza e politica», 1990, p. 41; cfr. inoltre I. Porciani (ed.), *Università e scienza nazionale*, Napoli, Jovene, 2001.

³¹ Sani, *Introduzione*, cit., pp. 58-63.

³² Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratese tra Otto e Novecento*, cit., p. 152.

³³ M. Sbriccoli, *La benda della giustizia, iconografia, diritto e leggi penali dal medioevo all'età moderna*, in id., *Storia del diritto penale e della giustizia. Scritti editi e inediti (1972-2007)*, Milano, Giuffrè, 2009, pp. 155-192.

³⁴ Sani, *Introduzione*, cit., p. 49.

³⁵ Cfr. tra gli altri G. Cianferotti, *La prolusione di Orlando. Il paradigma pandettistico, i nuovi giuristi universitari e lo stato liberale*, «Rivista trimestrale di diritto pubblico», vol. 29, n. 4, 1989, pp. 995-1024; Id., *L'Università di Siena e la «vertenza Scialoja». Concettualismo giuridico, giurisprudenza pratica e insegnamento del diritto in Italia alla fine dell'Ottocento*, in R. Grispo (ed.), *Studi in memoria di Giovanni Cassandro*, Roma, Ministero per i beni culturali e ambientali, Ufficio centrale per i beni archivistici, Roma, 1991, pp. 212-235; Id., *Università e scienza giuridica nell'Italia unita*, in Porciani (ed.), *Università e scienza nazionale*, cit., pp. 19-75; P. Grossi, *Scienza*

del «giurista uno e trino» il secolo delle Università è parso coincidere col secolo delle professioni giuridiche³⁶.

Opportunamente Pomante ricomprende la storia dell'insegnamento legale entro quella, più generale, che investiva il sapere giuridico e le professioni forensi tra Otto e Novecento. Tra i temi più dibattuti risaltava il canone ricorrente dei «troppi avvocati», prodromo della propaganda sull'inutilità degli studi non spendibili nella società e causa di «spostati sociali», ma che comunque continuavano ad attrarre la popolazione studentesca anche fuori d'Italia, specie di fronte ad un'alta qualità dell'insegnamento del diritto³⁷. Il germanesimo, elemento costitutivo della scienza giuridica del tardo Ottocento³⁸, contribuiva a far radicare l'idea della superiorità del modello universitario tedesco, fatto di centri di cultura diffusa, rispetto all'accentramento francese, con pochi centri di alta formazione³⁹.

Nel libro di Pomante la storia della presenza scientifica a Macerata di maestri come Tartufari, Arangio Ruiz, Ranalletti, e poi Capograssi, Mortati, smentisce la vulgata che voleva un legame tra università minori e docenti di minor qualità, causidici locali e non studiosi. D'altro canto l'ateneo marchigiano si è rivelato sede di passaggio; se ciò evitava il localismo, pure portava alla perdita dei professori illustri, che se ne andavano dopo il triennio di straordinariato, in vista delle chiamate in atenei più ricchi. Neppure il pareggiamento risolveva i problemi dell'organico chiuso, aggravato dai provvedimenti adottati in età giolittiana; la Facoltà era costretta, ad esempio, a rinunciare a chi definiva un «giovane di alto valore», l'allora commercialista Alfredo Rocco, futuro architetto del regime fascista⁴⁰. Negli anni quaranta giungevano poi Jemolo e Carnelutti⁴¹, accomunati da Pomante nel saper tematizzare nella ricerca e nell'insegnamento il rapporto Stato cittadino, dall'evidente dimensione costituzionale. Negli anni

giuridica italiana, Un profilo storico, Milano, Giuffrè, 2000. Cfr. ora, anche per indicazioni, i saggi raccolti in P. Cappellini, P. Costa, M. Fioravanti, B. Sordi (edd.), *Il contributo italiano alla storia del pensiero. Diritto, Enciclopedia italiana di scienze, lettere e arti*, Appendice VIII, Roma, Istituto della Enciclopedia italiana, 2012; F. Ruge, «*Scienze dello Stato e State» building in Italia nei decenni attorno all'Unità*, in Ferraresi, Signori (edd.), *Le Università e l'Unità d'Italia (1848-1870)*, cit., pp. 181-188.

³⁶ A. Mazzacane, *Secolo delle Università, secolo delle professioni: le ragioni di un incontro*, in Mazzacane, Vano (edd.), *Le professioni giuridiche in Europa nell'età liberale*, cit., p. 9.

³⁷ Sul tema anche per indicazioni cfr. A. Mazzacane, P. Schiera (edd.), *Enciclopedia e sapere scientifico. Il diritto nelle scienze sociali nella Enciclopedia giuridica italiana*, Bologna, il Mulino, 1990; Mazzacane, Vano (edd.), *Università e professioni giuridiche in Europa nell'età liberale*, cit.; D. Maffei, *Studi di storia delle Università e della letteratura giuridica*, Golbach, Keip, 1995.

³⁸ G. Cianferotti, *Germanesimo e Università in Italia alla fine dell'Ottocento: il caso di Camerino*, «Studi senesi», vol. C, n. 1, 1988, pp. 327-347.

³⁹ Von Rudiger, *Il modello tedesco: Università e Bildungsbürgertum*, cit.; Karady, *Universities and Nation States*, cit.

⁴⁰ P. Costa, *Rocco, Alfredo*, in Birocchi, Cortese, Mattone, Miletti (edd.), *Dizionario biografico dei giuristi italiani*, cit., pp. 1701 ss.

⁴¹ F. Margiotta Broglio, *Jemolo, Carlo Arturo*, *ibid.*, pp. 1121 ss.; M. Orlandi, *Carnelutti, Francesco*, *ibid.*, pp. 455 ss.

cinquanta Macerata si avvaleva della presenza di protagonisti della civilistica, giuspubblicistica, penalistica, tra gli altri Rescigno, Lavagna, Foschini⁴².

Pomante mostra che l'ateneo maceratense assecondava la riforma Gentile, ben ricostruita nei suoi profili tecnici ed ideologici, in grado di imprimere una indubbia modernizzazione del sistema universitario nel segno della specializzazione. Da qui la creazione dell'Istituto di esercitazioni giuridiche, la scuola di perfezionamento in diritto agrario, di economia e statistica agraria. Nelle parole dell'allora rettore, Bachi, risaltava il saper comprendere il senso della legge del 1923, nel volere legare l'ateneo alle esigenze specifiche del territorio. Sul piano della produzione scientifica, innescata dalla legge del 1923, nascevano gli *Annali* e la *Biblioteca*, ad essi collegata⁴³. Non a torto Sani coglie la distanza tra l'atteggiamento difensivista dei rettori delle Università minori negli anni Ottanta dell'Ottocento – esemplare l'invenzione delle origini duecentesche dello *Studium* – e il voler rilanciare le secondarie come fucina degli operatori del diritto, tanti, richiesti dalla vita giuridica e sociale degli anni trenta del Novecento. Maturava in questo contesto la integrale «statizzazione» del 1935, premessa per la crescita generale della geografia universitaria⁴⁴.

Pomante mostra che, preparata da un grande dibattito, durato decenni, a metà anni Sessanta era istituita la Facoltà di Lettere e Filosofia, articolata in tre corsi, Lettere, Filosofia, Lingue e letterature straniere moderne. Il libro si sofferma sulle politiche universitarie dell'Italia repubblicana, fin dentro gli anni Cinquanta, quando cresceva la popolazione studentesca ed arrivavano le ragazze⁴⁵. Attraverso le *Relazioni* dei rettori Sani rilegge lo scarto tra l'approccio democratico legittimante, Costituzione alla mano, un'Università «di massa», e le criticità e patologie scaturite da quel modello. Segnala la polarità tra lo studente, che aveva «diritto allo studio ma non obbligo dello studio», ed i professori, con la loro domanda di «rigore». L'istanza «meritocratica», rimasta inevasa, è messa in conto ai ritardi del mondo universitario e delle politiche per l'Università, anche di quelle del centro sinistra, inadeguate a coniugare allargamento della popolazione studentesca, efficacia della docenza, preparazione culturale e scientifica dei laureati. Sani conclude che di lì a poco il 1968, «anno degli studenti», avrebbe ridefinito i termini del problema⁴⁶.

Il caso Macerata, che le recenti ricerche hanno ben ricostruito, aggiunge insomma una tessera significativa per la comprensione del ruolo assunto dalle università minori nella storia nazionale, ad iniziare dal profilo a mio avviso

⁴² M. Gregorio, *Lavagna, Carlo, ibid.*, pp. 1156 ss.; I. Rosoni, *Foschini Gustavo, ibid.*, pp. 864 ss.

⁴³ Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., pp. 282-340.

⁴⁴ Sani, *Introduzione*, cit., p. 33.

⁴⁵ Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., pp. 359-392.

⁴⁶ Sani, *Introduzione*, cit., p. 67.

cruciale, la polarità tra accentramento ed autonomia. Al proposito, nella densa *Introduzione* al suo volume Pomante tematizza una «pregiudiziale di carattere centralista», che ha pesato sul «modo stesso di considerare e dunque valutare i singoli atenei minori». Il «centralismo italianista di matrice ottocentesca» ha poi portato i governi a privilegiare, almeno nella seconda metà dell'Ottocento, gli atenei maggiori; la scelta ha segnato anche le tensioni per l'autonomia, dipanatesi tra Ottocento e Novecento. L'autore conclude che, nonostante la Costituzione, neppure il centro sinistra ha arginato da un lato il centralismo, dall'altro le pressioni delle amministrazioni locali, che facevano proliferare sedi, anche distaccate, anche libere, e poi statizzate, fuori da ogni programmazione⁴⁷.

Si torna ad un nodo costituzionale della storia d'Italia, quella liberale, quella fascista, quella repubblicana: lo Stato nazionale ha tra i suoi caratteri originari e tratti permanenti – come è noto, sono termini usati da Mario Sbriccoli⁴⁸ – l'essere stato edificato sul binomio «municipi e nazione», sulle «cento città d'Italia». Un quesito pare meritare una riflessione: nel passaggio dalla città alla nazione il sistema universitario costituiva un «campo di tensione» – come prospettato da un denso saggio di Moretti e Porciani⁴⁹ – o un contenitore di fattori entrambi identitari, a dar senso a quella particolare statualità? In questo senso un attento osservatore delle istituzioni universitarie come Augusto Graziani – autore di un rilevantissimo contributo *Ordinamento dell'istruzione superiore* nel *Trattato* di Orlando – mostrava la *vanitas* dei tentativi dei governi di istituire una sede regionale, vocata a superare quelle municipali in nome di una razionalizzazione delle risorse. Lo stesso Graziani si opponeva con forza ad un eventuale «ordinamento artificiale»⁵⁰.

Una nuova territorializzazione era il profilo meno drastico del progetto Martini, il cui naufragio sanciva il definitivo tramonto delle ipotesi riduzioniste, assenti nelle tensioni per l'autonomia, che pure taluni continuavano a declinare polemicamente come eutanasia, da Baccelli a Gentile ed oltre⁵¹. A fine Ottocento alla logica delle sedi «artificiali» il mondo universitario reagiva appoggiandosi alle «memorie gloriose»; ad esempio il rettore di Siena, Barduzzi, ricordava a

⁴⁷ Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., p. 41.

⁴⁸ Si riprende il titolo del memorabile saggio sul sistema penale di M. Sbriccoli, *Caratteri originari e tratti permanenti del sistema penale italiano (1860-1990)*, ora in id., *Storia del diritto penale e della giustizia. Scritti editi e inediti (1972-2007)*, cit., pp. 591 ss.

⁴⁹ M. Moretti, I. Porciani, *Il sistema universitario tra nazione e città: un campo di tensione*, in M. Meriggi, P. Schiera (edd.), *Dalla città alla nazione. Borghesie ottocentesche in Italia e in Germania*, Bologna, il Mulino, 1993, pp. 289-306.

⁵⁰ A. Graziani, *Ordinamento dell'istruzione superiore*, in *Primo Trattato di diritto amministrativo diretto da V.E. Orlando*, Milano, Giuffrè, 1904, p. 845, citato anche da Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., p. 140.

⁵¹ Sia consentito rinviare a F. Colao, *Tra accentramento e autonomia: l'amministrazione universitaria dall'Unità ad oggi*, in Brizzi, Del Negro, Romano (edd.), *Storia delle Università in Italia*, cit., Vol. I, pp. 287-322.

Martini che l'«artificioso» ateneo etrusco era stato istituito dal retrivo Granduca nel 1851, soprattutto per arginare gli ideali e l'azione risorgimentisti di docenti e studenti, e che Mazzini aveva posto la «vita italiana nella vita comunale, col fondamento dell'unità nazionale nelle Università»⁵².

La regionalizzazione delle sedi è un'istanza avanzata anche oggi, specie per le scarse risorse finanziarie, che affliggono la nostra contemporaneità; il tema pare peraltro trovare un limite anche nella vita non facile delle Regioni, ipotesi istituzionale tramontata alle origini dello Stato unitario, decollata negli anni Settanta del Novecento⁵³. Al proposito sia le pagine di Sani sui tentativi di varare un «ateneo del medio Adriatico»⁵⁴ che il libro di Pomante ben ricostruiscono i fallimenti delle ricorrenti ipotesi di creazione di un polo regionale; mostrano che per i contrasti delle autorità accademiche e politiche locali sfumavano un progetto di riordinamento del 1919, l'«Università nazionale dell'Adriatico», la «grande Università marchigiana». Anche in assenza di decollo legislativo l'ateneo conosceva peraltro una «regionalizzazione», nel segno dell'attrazione della popolazione studentesca delle Marche. Eppure, tra Otto e Novecento, la creazione di un ente «artificiale» era rimandata all'erigendo «ente regione», percepito dal legislatore come un «problema»⁵⁵.

⁵² Sulla vicenda sia consentito rinviare a F. Colao, *L'Università tra Stato, città, regione. Il «Progetto Martini» tra statistiche e «memorie gloriose»*, «Rassegna storica toscana», vol. LI, n. 1, 2005, pp. 123-144, in partic. p. 140; cfr. ora A. Breccia, R.P. Coppini, «Etruria docet». *L'Università di Pisa tra Granducato e Regno d'Italia*, in Ferraresi, Signori (edd.), *Le Università e l'Unità d'Italia (1848-1870)*, cit., pp. 129-143.

⁵³ Si veda *Storia d'Italia. Le regioni dall'Unità ad oggi*, Torino, Einaudi, 1977-2002.

⁵⁴ Sani, *Introduzione*, cit., p. 67.

⁵⁵ Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., pp. 359-392. cit., pp. 257-264 e pp. 359-392.

Due recenti volumi sulla storia dell'Università di Macerata¹

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Two recent books on the history of the University of Macerata

ABSTRACT: The recent books of Luigiaurelio Pomante on the University of Macerata offer an important contribution for identifying the role of minor universities in Italy. On the basis of a careful analysis of recently published books, the author examines the evolution of the Italian university system between the nineteenth and twentieth century with special reference to the minor universities.

EET/TEE KEYWORDS: University; History; Education System; Italy; XIX-XX Centuries.

Gli studi sui singoli atenei italiani a lungo hanno avuto un carattere celebrativo e, per così dire, interno all'istituzione studiata, della quale venivano messi in luce analiticamente dati prosopografici dei docenti, le discipline, e la storia quindi istituzionale. Dal lavoro di Nicola Spano sull'Università di Roma, del 1935, a quello di Pietro Vaccari sull'Ateneo ticinese, del 1948², diverse sono state le opere, ancor oggi utili, aventi però questo taglio. Negli ultimi 25 anni invece gli studi hanno connesso la politica universitaria nazionale allo sviluppo economico e scientifico del paese, nonché al processo di costruzione dello Stato italiano e alle ideologie via via dominanti – si pensi ai lavori di Roberto Maiocchi sul fascismo, la scienze e il CNR³, o all'indagine di Helmut

¹ L. Pomante (ed.), *L'Università di Macerata nell'Italia unita (1861-1966). Un secolo di storia dell'ateneo maceratese attraverso le relazioni inaugurali dei rettori e altre fonti archivistiche e a stampa*, Macerata, eum, 2012; L. Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, Macerata, eum, 2013.

² Nicola Spano, *L'Università di Roma*, Roma, Mediterranea, 1935, ancora utile nonostante il palese fine politico-celebrativo; P. Vaccari, *Storia della Università di Pavia*, Pavia, Il Portale, 1948.

³ R. Maiocchi, *Scienziati italiani e scienza nazionale (1919-1939)*, in S. Soldani, G. Turi (edd.),

Goetz sul giuramento fascista⁴, ma prima ancora agli imprescindibili studi di Pierangelo Schiera sul nesso scienza-politica nel 'laboratorio borghese' della Germania ottocentesca⁵.

Sono fioriti, quindi, nuovi studi, e Centri di ricerca, dal 1996 coordinati dal Centro interuniversitario per la storia delle università italiane (Cisui), che dal 1997 ha dato vita agli *Annali di storia delle Università italiane*, diretti di Gian Paolo Brizzi, importante strumento di diffusione della ricerca. Al Cisui si deve dal 1997 l'annuale pubblicazione on-line del repertorio bibliografico degli studi sull'università⁶ che, dopo il *Repertorio nazionale degli storici delle università 1993-1997* di Daniela Negrini⁷, costituisce un altro utilissimo mezzo per orientarsi nel panorama scientifico e che illustra la ricchezza degli studi degli ultimi 25 anni. Tra gli studi più recenti, segnalano i volumi sulla storia dell'Università Cattolica del Sacro Cuore, che sono stati pubblicati a seguito dell'impulso dell'allora rettore prof. Lorenzo Ornaghi⁸.

I volumi che qui si presentano si inseriscono all'interno di un filone di studi, quello relativo agli atenei minori, che da tempo pure è stato oggetto di diverse ricerche e vari convegni, di cui i due testi danno conto in sede di discussione e di note⁹. Il caso dell'ateneo maceratese, peraltro, presenta caratteristiche molto particolari, che lo pongono in una situazione quasi unica. Intanto, il mancato riconoscimento giuridico costituì a lungo un pesante fardello. Tenacemente fermi nel rivendicare lo status di università regia, benché secondaria, i rettori dell'ateneo, negli anni postunitari, dovettero fronteggiare le difficoltà legate ai problemi economici conseguenti alla non inclusione dell'Università marchigiana

Fare gli italiani: scuola e cultura nell'Italia contemporanea, 2 voll., Bologna, il Mulino, 1993, Vol. I, pp. 41-86; R. Maiocchi, *Gli scienziati del duce: il ruolo dei ricercatori e del CNR nella politica autarchica del fascismo*, Roma, Carocci, 2003; Id., *Il CNR negli ultimi anni del fascismo*, in P.G. Zunino (ed.), *Università e accademie negli anni del fascismo e del nazismo: atti del Convegno internazionale*, Torino, 11-13 maggio 2005, Firenze, Leo S. Olschki, 2008, pp. 273-298.

⁴ H. Goetz, *Il giuramento rifiutato: i docenti universitari e il regime fascista*, Scandicci, La nuova Italia, 2000.

⁵ P. Schiera, *Il laboratorio borghese: scienza e politica nella Germania dell'Ottocento*, Bologna, il Mulino, 1987.

⁶ Url: <http://www.cisui.unibo.it/frame_biblio.htm> (ultimo accesso: 22 novembre, 2013).

⁷ D. Negrini (ed.), *Repertorio nazionale degli storici dell'università. 1993-1997*, Centro interuniversitario per la storia delle università italiane, Bologna, Clueb, 1998.

⁸ *Storia dell'Università Cattolica del Sacro Cuore*, Milano, Vita e Pensiero, 2007- : Vol. 1. *Le fonti: i Discorsi di inizio anno da Agostino Gemelli a Adriano Bausola: 1921/22-1997/98*, a cura di A. Cova.; Vol. 2. *Le fonti: l'Università Cattolica nelle carte degli archivi*, a cura di M. Bocci, con un repertorio degli studi e delle fonti a stampa a cura di N. Martinelli, S. Riboldi; Vol. 4. *Le istituzioni: Per una comunità educante: la formazione e la didattica*, a cura di A. Carera, Vol. 5. *Le istituzioni: I patrimoni dell'Università Cattolica*, a cura di M. Bocci, L. Ornaghi; Vol. 6. *Agostino Gemelli e il suo tempo: atti del convegno storico "Nel cuore della realtà. Agostino Gemelli e il suo tempo"*, Milano, 28-30 aprile 2009, a cura di M. Bocci.

⁹ M. Da Passano (ed.). *Le Università minori in Italia nel XIX secolo*, Sassari, Centro interdisciplinare per la storia dell'ateneo di Sassari, 1993; G.P. Brizzi, J. Verger (edd.), *Le Università minori in Europa (secoli XV-XIX)*, Soveria Mannelli, Rubbettino, 1998.

nell'elenco degli atenei finanziati dallo Stato, nella legge Matteucci del 31 luglio 1862. Il contributo governativo, infatti, era di entità risibile, sicché per decenni i docenti dell'ateneo soffrirono di una forte sperequazione nello stipendio, ciò che determinò il loro scarso radicamento. La mobilità estrema dei docenti, che vedevano necessariamente in Macerata una sede di passaggio, non poté non riflettersi negativamente sulla storia scientifica dell'ateneo, che non fu privo di docenti di spicco, ma che non ebbe scuole durature, appunto per la brevità della permanenza dei professori.

La terza via per le università minori, soffocate dalla legge Matteucci e minacciate dai provvedimenti di stampo accentratore da un lato e dall'altro invece tese a richiedere la piena parificazione, sarebbe stata la via dei consorzi. Inaugurata da Correnti nel 1872, con il Consorzio per l'istituto di Studi superiori di Firenze, questa strada fu intelligentemente proposta da Scialoja nel suo progetto di legge del 1872-73, che prevedeva che gli atenei con un numero di studenti inferiore a 100 chiudessero, o continuassero a vivere qualora gli enti locali – Comune e Provincia – sostenessero metà delle spese. In tal caso, lo Stato si accollava l'altra metà. Una soluzione equa, che sollecitava il concorso delle forze locali. Di lì a poco i consorzi si moltiplicarono: nel 1875 Bonghi diede vita a quelli per Siena, Pavia e Milano; nel 1876-77 Coppino varò quelli per Genova, Modena, Parma e Torino. Nel 1880 fu approvato il consorzio appunto di Macerata, cui seguirono Messina, Bologna, Sassari, Palermo¹⁰. I risultati di questi provvedimenti furono però disomogenei: lenti negli atenei minori, come Giuseppina Fois ha dimostrato per Sassari¹¹, e invece rapidi negli atenei di primo grado, che partivano già avvantaggiati, come Torino, o che comunque si trovavano in aree economicamente avanzate e con maggior disponibilità di fondi. Non a caso, nel 1895 Martini e Ferraris osservando appunto che i consorzi sortivano effetto positivo nel caso degli atenei maggiori, proposero, in un celebre loro scritto, di chiudere gli atenei di Messina, Siena, Modena, Parma, Sassari e Macerata¹². Nell'età della Sinistra, comunque (ma già, come detto, da Scialoja nel 1872) venne riconosciuto alle università minori un ruolo politico nello sviluppo del tessuto sociale locale, ovvero un ruolo dinamico e propulsivo per la piccola e media borghesia. Non si trattava cioè di vedere nei piccoli atenei solo dei centri scientificamente poveri e arretrati, da chiudere per evitare la dispersione dei (pochi) fondi disponibili e l'erogazione di titoli di

¹⁰ Mi permetto di rimandare a S. Polenghi, *Autonomia e decentramento nell'università italiana dalla Destra storica dal secondo ministero Coppino (1859-1878)*, in *Il cerchio e l'ellisse. Centralismo e autonomia nella storia della scuola dal XIX al XXI secolo*, a cura di F. Pruneri, Roma, Carocci, 2005, pp. 57-107.

¹¹ G. Fois, *L'Università di Sassari nell'Italia liberale: dalla Legge Casati alla rinascita dell'età giolittiana nelle relazioni annuali dei rettori*, Sassari, Centro interdisciplinare per la storia dell'Università di Sassari, 1991.

¹² F. Martini, C.F. Ferraris, *Ordinamento generale degli istituti d'istruzione superiore: studi e proposte*, Milano, Hoepli, 1895.

studio di scarso valore. Essi non erano ostacolo allo sviluppo della scienza e del paese, come Matteucci e molti avevano sostenuto, non erano espressione di logiche di potere campanilistiche, bensì erano luoghi di aggregazione e formazione politico-scientifica della classe dirigente locale. In particolare con l'ampliamento del suffragio, la formazione di più ampi strati di giovani alla visione nazionale e la partecipazione al processo di costruzione dell'identità dello Stato nazionale passava anche attraverso l'opera degli atenei minori. Alcune cattedre svolsero un ruolo non secondario in questo processo di coinvolgimento della piccola borghesia nel movimento di *Nation building*¹³. Il riconoscimento di questa funzione positiva caratterizza i nuovi studi storici, tra i quali questi di Pomante. Tra l'altro, merita notare che avendo l'ateneo maceratese solo la Facoltà giuridica, non abbisognava di fondi cospicui, quali quelli necessari per le Facoltà scientifiche, quindi più facilmente si sarebbe potuto intervenire per sanarne il bilancio, consentendo ai docenti uno stipendio più decoroso.

Non a caso, proprio nel 1890 a Macerata si operò una falsificazione storiografica, che retrodatò la nascita dell'ateneo, al fine di celebrarne le glorie. Questa invenzione delle origini dello Studio maceratese, collocate nel 1290, in realtà costituì un'operazione di voluta mistificazione che, come opportunamente nota Roberto Sani riprendendo Hobsbawm e Ranger, si poneva nel solco dell'invenzione della tradizione mirante a legittimare un'istituzione¹⁴.

Finalmente nel 1901 Macerata ottenne il pareggio, ma nel 1909 i suoi docenti furono esclusi dal ruolo organico nazionale: nuova beffa sino alla definitiva parificazione nel 1919. La riforma Gentile incluse Macerata tra gli atenei di gruppo B, assegnandole ancora un finanziamento misero. Nel 1924, aspirando Macerata a porsi come polo scientifico del medio Adriatico e guardando alle coste dalmate, si stipulò una nuova convenzione tra lo Stato e gli enti locali per il sostentamento dell'Università, che tra l'altro erogò 53 borse di studio annue, un numero elevato, che, come nota Pomante, consentì di arginare il calo delle iscrizioni in atto dagli anni Venti. L'incremento numerico degli iscritti (maschi, perché il numero delle studentesse, già basso, fu ridotto quasi a zero negli anni del fascismo) però corrispose alla loro regionalizzazione e si accompagnò al perdurare del fenomeno della fugace permanenza dei docenti di ruolo e all'abnorme numero di docenti incaricati. La capacità di Macerata di attirare studenti dalle regioni meridionali (Puglie, Marche e Abruzzo) andò poi scemando in corrispondenza dell'apertura di altri Atenei, prima Bari nel 1924, nel 1955 Lecce e poi L'Aquila, Chieti-Pescara e Ancona.

¹³ Da Passano (ed.), *Le Università minori in Italia nel XIX secolo*, cit.; M. Moretti, *Piccole, povere e «libere»: le università municipali nell'Italia liberale*, in Brizzi, Verger (edd.), *Le Università minori in Europa (secoli XV-XIX)*, cit., pp. 533-562.

¹⁴ R. Sani, *Introduzione. Le Relazioni annuali dei rettori per la inaugurazione degli anni accademici. Una fonte preziosa per la storia delle Università*, in Pomante, *L'Università di Macerata nell'Italia unita*, cit., pp. 25-77; E. Hobsbawm, E. Ranger (edd.), *The Invention of Tradition*, Cambridge, Cambridge University Press, 1983 (1^a ed. it. Torino 1987).

Un dato che Pomante mette in luce e che contraddice la fama di atenei 'facili' che gravava sulle università minori – e che in effetti a volte era fondata – è la severità dei professori. Le valutazioni, infatti, a Macerata furono sempre rigide. Gli esami appaiono connotati dal rigore, ancora negli anni Sessanta.

La presenza a Macerata della sola Facoltà di Giurisprudenza faceva dell'ateneo un caso singolare, connotato per decenni da un piccolo numero di studenti. La concorrenza, inoltre, all'interno della medesima regione, di Camerino e Urbino, ove pure era presente la Facoltà giuridica, costituiva un palese esempio di incapacità politica di razionalizzazione e coordinamento delle risorse, ancora denunciata negli anni Sessanta dalle organizzazioni studentesche. Solo nel 1964 sarebbe stata firmata la convenzione per erigere la Facoltà di Lettere e filosofia. Il volume di Pomante opportunamente si arresta a questa data, che apre nuovi campi di indagine.

Diverse sono le ragioni di apprezzamento del volume pubblicato nel 2013 dal giovane studioso. Anzitutto, la ricchezza delle fonti utilizzate, a partire da quelle archivistiche: Pomante ha infatti setacciato gli archivi locali e nazionali, con grande precisione e acribia. Tra le fonti a stampa, oltre agli atti parlamentari, al Bollettino del ministero della PI, ai dati ISTAT e alla pubblicistica locale (pure fonte di rilievo e che richiede lunga consultazione), si è avvalso delle relazioni dei rettori, raccolte nel 2012 nel corposo volume, corredato da un'ampia introduzione di Roberto Sani, già rettore dell'ateneo maceratese, e da un lungo saggio del medesimo Pomante¹⁵. È appena il caso di sottolineare l'importanza di questa fonte, che delinea strategie di politica accademica ed evidenzia problemi e scelte di un ateneo a lungo posto in una situazione di grave difficoltà.

Altro pregio del volume sullo *Studium Generale Maceratense* tra Otto e Novecento è il termine *a quo* della ricerca, che non principia dall'unità d'Italia, bensì dall'età napoleonica, assai spesso momento di svolta nella storia della scuola e dell'università. La drastica decisione di sopprimere l'ateneo e sostituirlo con un Liceo, secondo il disegno accentratore napoleonico, anticipava le proposte postunitarie, peraltro attuate per poco tempo solo nel caso di Sassari. L'età della Restaurazione, con la Bolla *Quod Divina Sapientia*, con le tensioni liberali e il forte controllo sugli studenti è pure opportunamente ricordata nel primo capitolo¹⁶.

Sotto il profilo della costruzione della ricerca, merita rilevare che Pomante ha ricostruito non solo la storia istituzionale del piccolo ateneo, ma ha avuto cura di dedicare spazio ai docenti e ai loro studi, nonché alla popolazione studentesca. Molto interessanti sono i dati quantitativi esaminati dall'autore,

¹⁵ Sani, *Introduzione*, cit.; L. Pomante, *Per una storia dell'Università di Macerata nell'Italia unita (1861-1966)*, in Id., *L'Università di Macerata nell'Italia unita (1861-1966). Un secolo di storia dell'ateneo maceratese attraverso le relazioni inaugurali dei rettori e altre fonti archivistiche e a stampa dell'Università di Macerata nell'Italia unita (1861-1966)*, cit., pp. 79-199.

¹⁶ Pomante, *Per una storia delle Università minori nell'Italia contemporanea. Il caso dello Studium Generale Maceratense tra Otto e Novecento*, cit., pp. 47-86.

che ricostruiscono la provenienza geografica degli studenti nel corso dei decenni. Sarebbe interessante (in un futuro lavoro, perché questo è già molto ampio e articolato) avviare un'ulteriore indagine di tipo qualitativo, per poter determinare quale fu l'impatto del conseguimento della laurea, ovvero se il titolo di studio consentì effettivamente mobilità sociale. Trattandosi di una sola Facoltà, con numeri contenuti, una ricerca a campione su avvocati e magistrati o su altri impieghi nelle Marche potrebbe consentire di verificare la ricadute sociali del possesso del titolo di studio. Inoltre, un futuro lavoro potrebbe prendere in considerazione la vita studentesca, avvalendosi, ove possibile, di fonti quali memorie, diari, giornali studenteschi. Gli anni Settanta del secolo scorso potrebbero costituire un interessante campo di indagine, per verificare l'impatto del movimento del '68 in un piccolo ateneo¹⁷.

Un'altra pista di ricerca riguarda le donne, studentesse e docenti. La presenza della sola facoltà giuridica, in tal senso, non agevola, perché come è noto pochissime furono in Italia le laureate in diritto, stante l'impossibilità per loro di esercitare l'avvocatura, sino al 1919¹⁸. Il noto caso di Lidia Poët¹⁹ è emblematico e proprio a Macerata si laureò in diritto una delle prime e poche studentesse, Iriade Tartarini nel 1898. La seconda si laureò solo nel 1923/24. Con l'apertura della Facoltà di Lettere e filosofia, nel 1964, anche a Macerata si sarebbe verificata la femminilizzazione del corpo studentesco, un fenomeno da indagare, insieme a quello delle prime docenze femminili: già è interessante

¹⁷ Numerosi sono ormai i lavori sulla vita studentesca e sulla politicizzazione degli studenti. Mi limito a rimandare al pionieristico lavoro di K.H. Jarausch, *Deutsche Studenten 1800-1970*, Frankfurt a-M., Suhrkamp, 1984 e ai recenti A. Arisi Rota, *La gioventù delle università come avanguardia politica: per una fenomenologia dello studente patriota*, in A. Ferraresi, E. Signori (edd.), *Le Università e l'Unità d'Italia (1848-1870)*, Bologna, Clueb, 2012, pp. 281-290; E. Signori, *Gli studenti dopo l'Unità: patriottismo, protesta corporativa e impegno politico*, ibid., pp. 291-308. Ma si vedano anche come modelli: G. Quagliariello *Studenti e politica: dalla crisi della goliardia prefascista al primo congresso nazionale universitario, 1925-1946*, Manduria, Lacaita, 1987 e M. Bocci, *Un problema di identità? Alle origini della contestazione studentesca all'Università Cattolica*, in M. Invernizzi, P. Martinucci (edd.), *Dal "centrismo" al Sessantotto*, Milano, Ares, 2007, pp. 143-228.

¹⁸ Sull'accesso delle donne all'università e sulle prime libere docenti mi permetto di rimandare a S. Polenghi, «Non spostare artificialmente dalla missione naturale». *Le donne e l'università tra Otto e Novecento*, in C. Ghizzoni, S. Polenghi (edd.), *L'altra metà della scuola. Educazione e lavoro delle donne tra Otto e Novecento*, Torino, SEI, 2008, pp. 285-318.

¹⁹ Sulla Poët e sulla storia dell'accesso femminile alle professioni giuridiche si rimanda a F. Tacchi, *Gli avvocati italiani dall'Unità alla Repubblica*, Bologna, il Mulino, 2002, pp. 262-303; Ead., *Donna e avvocatura dall'età liberale a oggi*, «Rassegna forense», n. 3, 2002, pp. 461-499; Ead., *Dall'esclusione all'inclusione. Il lungo cammino delle laureate in giurisprudenza*, «Società e storia», n. 103, 2004, pp. 101-125; cfr. anche F. Taricone, *Associazione e interventismo femminile*, in F. Taricone, B. Pisa (edd.), *Operaie, borghesi, contadine del XIX secolo*, Roma, Carocci, 1985, pp. 25-27, 30-31; R. Canosa, *Il giudice e la donna: cento anni di sentenze sulla condizione femminile*, Milano, G. Mazzotta, 1977, pp. 26-33; M. De Giorgio, *Donne e professioni*, in *Storia d'Italia, Annali*, Vol. 10: M. Malatesta (ed.), *Professionisti*, Torino, Einaudi, 1996, pp. 463-471; C. Bounous, *La toga negata: da Lidia Poët all'attuale realtà torinese. Il cammino delle donne nelle professioni giuridiche*, Pinerolo, Alzani, 1997.

il caso della Tartarini, che ebbe il coraggio di scrivere una tesi in filosofia del diritto, nella quale sosteneva i diritti delle donne ad accedere alla professioni e all'avvocatura e che probabilmente per le sue tesi emancipazioniste fu penalizzata in sede di votazione, come hanno notato Sandro Serangeli e lo stesso Pomante in un articolo²⁰.

Infine, i due volumi in questione consentono di aggiungere alcuni importanti tasselli alla conoscenza della storia dell'università italiana e dei piccoli atenei, offrendo spunti di riflessione anche in ordine all'odierna situazione, caratterizzata ancora da una irrazionale distribuzione sul territorio e dalla proliferazione di università telematiche. Le politiche attuali di controllo, contrazione e tagli, conseguenti ad una espansione recente ed esagerata, rischiano, se mal condotte, di produrre effetti distorti. La saturazione dell'offerta accademica nelle Marche affonda le radici nella storia recente e in quella più lontana: la differenziazione dell'offerta formativa e l'eccellenza scientifica si presentano come possibili vie di uscita dalla crisi, resa più difficile, anche oggi, dalla carenza di risorse economiche.

²⁰ S. Serangeli, L. Pomante, *L'inatteso dono di un abbandonato album fotografico: Iriade Tartarini e i suoi compagni d'università del 1897*, «Annali di storia delle università italiane», vol. 13, 2009, pp. 175-185.

Forum / Discussioni

Imparare a scrivere lettere

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ABSTRACT: This work, inspired by a careful analysis of the recent book of Fabio Targhetta, "*Signor Maestro Onorandissimo*". *Imparare a scrivere lettere nella scuola italiana tra Otto e Novecento*, tries to draw a quick but comprehensive picture on the most recent works of history of education and of the history of the school and the main areas of study in which it is possible to understand ferments of great interest. In this context, the book of Targhetta is an interesting document of the new frontiers of educational history for its ability to value sources until now unpublished, for the intelligence demonstrated in reading them and interpreting them.

EET/TEE KEYWORDS: History of education; Citizenship education; Nationalization; Teacher's education; Italy; XIX-XX Centuries.

1. Il recente volume di Fabio Targhetta dedicato all'educazione epistolare ("*Signor Maestro Onorandissimo*". *Imparare a scrivere lettere nella scuola italiana tra Otto e Novecento*, Torino, Sei, 2013, pp. 195, euro 17) costituisce un ulteriore tassello di quella rilettura degli ultimi due secoli di storia educativa e scolastica italiana in corso ormai da qualche anno e dovuta a un gruppo di studiosi – molti dei quali abituali collaboratori di questa rivista – impegnato sia a valorizzare nuove fonti e sia a tracciare nuove ipotesi interpretative.

Numerosi saggi, volumi e lavori collettanei hanno ampliato le conoscenze sull'educazione, la pedagogia e la scuola tra Otto e Novecento, sottraendole a luoghi comuni e a schematismi storiografici. La profondità delle ricerche condotte in varie direzioni (compreso il livello territoriale locale) stanno infatti disegnando una radiografia dell'Italia educativa e pedagogica nella quale si è perseguito l'obiettivo non solo di «fare gli Italiani» (la scuola al servizio del progetto risorgimentale), ma anche e soprattutto – senza per questo sconvolgere le gerarchie sociali – di sottrarli all'ignoranza, riscattarne la povertà materiale

e sconfiggere quella che, nel linguaggio del tempo, era definita «la miseria morale» identificata spesso nella mancanza di un «carattere».

Dalle indagini compiute in varie direzioni – dalla formazione dei maestri all'educazione e assistenza dei portatori di handicap, dai preti e dalle suore ai tanti medici che associarono alla loro vocazione e professione l'identità di 'educatori', alle ricerche sui libri per l'infanzia, solo per citare qualche esempio – è emersa una realtà nazionale ben più complessa e varia rispetto alla ricostruzioni che, con opposte argomentazioni, fortemente impregnate di ideologie precostituite, la cristallizzarono in passato come l'esito quasi taumaturgico del processo risorgimentale oppure si limitarono a denunciarne i limiti in nome della sua origine 'borghese'.

Le varie iniziative messe in campo hanno rischiarato – sia detto incidentalmente – l'appassionata militanza di tante, talora oscure e dimenticate figure di educatori (soprattutto maestri e maestre, ma non solo) che, senza rinnegare ideali politici e convinzioni religiose diverse, condivisero l'obiettivo di creare le condizioni per diffondere l'istruzione, amare la lettura, concepire la scuola come una parte non secondaria del 'bene comune'. Il *Dizionario Biografico dell'Educazione* recentemente apparso costituisce la prova più evidente di quanto estesa ed eclettica fu la platea degli educatori in campo.

Come dimostrano il saggio di Targhetta e altre nuovissime pubblicazioni tutte dovute a giovani studiosi che qui appena accenno (*Ottocento fra casa e scuola*, a cura di Lorenzo Cantatore; *Falce e fumetto. Storia della stampa periodica socialista e comunista per l'infanzia in Italia* a cura di Juri Meda; *Formare maestre e maestri dell'Italia meridionale*, di Valeria Miceli; *Cremona civilissima: storia di una politica scolastica* di Matteo Morandi) i lavori sono ancora in corso. Vorrei fare cenno ad almeno due ambiti di studio nei quali si possono cogliere fermenti di grande interesse.

Il primo riguarda le ricerche che – a fianco della costituzione di numerosi Musei dell'educazione, della scuola e del libro per l'infanzia (le intitolazioni sono diverse) – hanno riportato alla luce, oltre ai quaderni, il materiale didattico prodotto specialmente dagli anni '80 del XIX secolo in poi. Si tratta di sussidi (mappamondi, alfabetieri, cartelloni murali, raccolte di pesi e misure, carte geografiche, attrezzi ginnici, ecc.) che innovarono le pratiche didattiche del tempo e accompagnarono l'evoluzione del libro di testo, spesso frutto entrambi dell'intraprendenza imprenditoriale degli editori maggiori. Un mondo di 'cose' che sta sollecitando l'attenzione non solo degli specialisti di storia scolastica e pedagogica, ma anche di storici della scienza, dell'arte, dello sport, di studiosi di geografia (basta pensare alla ricchezza delle carte geografiche e degli atlanti) e altre discipline.

Un secondo ambito riguarda l'appena intrapresa storia dell'evoluzione delle materie scolastiche e dei loro rapporti con i programmi di insegnamento. I cambiamenti che, di volta in volta, si susseguirono ai vari livelli scolastici furono, certo, l'esito di scelte politiche e la conseguenza di nuovi orientamenti culturali,

ma si compirono grazie all'azione di personalità che misero a disposizione della scuola la loro autorevolezza di studiosi allo scopo di sottrarla alla superficialità e di allinearla ai più alti livelli culturali. Basta a tal riguardo ricordare l'influenza di Giosue Carducci sui programmi di italiano e quella di Luigi Cremona in ambito matematico per averne un'idea.

La storia delle discipline è molto ricca di prospettive ancora in gran parte da indagare. Essa consente, tra l'altro, di approfondire i rapporti tra sapere scolastico e quello colto, coglierne gli scarti e stabilire l'entità degli scambi che, in prima approssimazione, furono assai più intensi e frequenti di quanto non si pensi. L'editoria per la scuola a tal riguardo costituisce una probante cartina di tornasole. A partire dagli anni '80 si moltiplicarono infatti i docenti universitari che si prestarono come autori di grammatiche, antologie letterarie, compendi di storia, manuali di matematica.

2. Il volume di Fabio Targhetta concorre a migliorare le conoscenze intorno a quei circuiti a base di «pedagogia implicita» che agirono – talora con maggior forza dei programmi stessi – nella formazione degli italiani, spesso inconsapevoli di esserlo o, addirittura, refrattari all'idea di far parte dell'Italia unita.

La ricerca dello studioso trevigiano è centrata sulla letteratura epistolare e sull'educazione a scrivere lettere ed è condotta attraverso innovative metodologie informatiche¹.

Per cogliere l'importanza dell'indagine bisogna porre mente a cosa significavano la lettera privata e quella d'affari almeno fino all'avvento dell'uso corrente del telefono (non parliamo delle odierne forme di comunicazione ultra veloci che stanno cancellando, in pratica, dalla nostra vita il rapporto epistolare scritto). Scrivere bene una lettera implicava, certo, la correttezza linguistica, ma tale – in apparenza semplice – gesto doveva anche dimostrare il possesso di quelle buone creanze repute parte inalienabile dell'identità sociale. La padronanza della scrittura epistolare rappresentava, infatti, una componente essenziale delle abilità di una persona reputata «educata».

L'immenso spazio delle lettere di affari costituiva, poi, un aspetto non secondario di molte professionalità, da quelle impiegate più semplici a quelle più complesse (ma su questo aspetto Targhetta si limita a qualche cenno soltanto).

Si comprende, dunque, come imparare a scrivere lettere costituisse un aspetto importante nella formazione personale e, dunque uno degli obiettivi previsti immancabilmente nei programmi scolastici fin dalla scuola elementare.

¹ Si veda F. Targhetta, "Signor Maestro Onorandissimo". *Imparare a scrivere lettere nella scuola italiana tra Otto e Novecento*, Torino, Sei, pp. XVIII-XXIII.

Ma, come vedremo, l'educazione epistolare costituiva anche una via per l'interiorizzazione di norme, regole e valori: a tal fine gli esempi proposti attraverso i modelli presentati negli appositi testi ricchi di esempi di lettere di ogni tipo (in prevalenza destinati agli adulti semi illetterati, ma spesso usati anche dai ragazzi), nei libri di scuola e nelle riviste per maestri costituivano un 'summa' dei sentimenti che un buon italiano avrebbe dovuto coltivare.

Già la «grammatica epistolare» rappresentava un disciplinamento pedagogico di tutto rispetto, tanto nel caso della scrittura privata quanto nelle lettere d'affari, perché era scandita da regole precise e di antica origine, regole senza la cui cognizione e lo scrupoloso rispetto lo scrivente dava di sé una impressione goffa o addirittura negativa.

Tra la metà dell'Ottocento e i primi decenni del secolo seguente l'educazione epistolare non subì grandi variazioni. Le regole mutuata dalla grande tradizione letteraria furono con il tempo solo mitigate a favore di una modesta libertà di espressione, ma sempre restando ben lontani dall'essere intesa come potremmo concepirla noi oggi. «Le remore di pedagogisti e uomini di scuola nell'abbandonare una metodologia didattica consolidata a favore dell'espressione libera erano dettate dal timore che i fanciulli difettassero quanto a immaginazione e fantasia e necessitassero di un'«imbeccata» da parte dell'insegnante»: nonostante i rischi, universalmente criticati, connessi all'impiego del metodo imitativo, esso era non di meno considerato «basilare nell'apprendimento linguistico»².

Alle tracce interamente preordinate si sostituirono semplicemente falsarighe meno cogenti. A loro volta gli argomenti delle letterine restarono tuttavia i medesimi dei decenni precedenti e solo modestamente 'modernizzati' nella forma linguistica. Neppure il «componimento libero» proposto da Giuseppe Lombardo Radice riuscì a mettere in discussione questo impianto, complici le pigrizie e gli interessi degli editori che spesso rieditavano immutabili i manuali di lettere precostituite.

3. Ben più ampio è tuttavia lo spazio che Targhetta riserva alla rilettura di alcuni sostanziali passaggi della pedagogia otto-novecentesca attraverso i modelli presentati negli appositi testi ricchi di esempi di lettere di ogni tipo, nei libri di scuola e nelle riviste per maestri.

Vorrei soffermarmi su pochi aspetti tra i tantissimi segnalati dall'autore, a cominciare dalle forme di quello che, all'inizio del Novecento, sarebbe poi diventato il tema dell'«educazione nazionale». I modelli epistolari veicolano in ordine di tempo soprattutto la centralità dell'educazione morale, a partire dal valore attribuito a quella impartita in famiglia intesa in duplice senso, come nucleo ristretto di genitori e fratelli e come sodalizio allargato a parentele più

² *Ibid.*, p. 17.

vaste e alla comunità di appartenenza (il borgo natio, il quartiere cittadino). È questa esperienza che media il rapporto con la patria.

«I riferimenti alla patria nelle lettere del secondo Ottocento sono rari, decisamente inferiori a quelli che si riferiscono alla comunità in cui vivono mittenti e destinatari»³, il che conferma quanto già documentato a proposito dei libri di testo: la pedagogia post risorgimentale non è nazionalistica come in tanti hanno improvvidamente scritto. La curvatura in tal senso è più tarda, verso la fine del secolo, quando l'ideologia della «Terza Italia» condizionerà anche la vita scolastica.

Prima di ogni cosa sta la preoccupazione per la formazione di un italiano solido nelle sue virtù private: probò, onesto, leale, sincero, lavoratore, in commistione con l'emergente mentalità self helpistica. Parte vitale della formazione etica, sono l'incitamento al lavoro, la condanna della pigrizia, la denuncia della menzogna bollata come «uno dei vizi più sconci che possano contaminare il nostro onore», il valore dello studio, il rispetto per il sentimento religioso.

Così si legge in un esempio di lettera tra fratelli:

Bada bene a quello che fai, ché il tempo vola ben più rapidamente che tu nol creda; presto sarai uscito dalla fanciullezza e dovrai procacciarti da per te il necessario alla vita, dato come sei all'ozio, non saprai piegarti a lavorare con quella sollecitudine che si conviene; ignorante, non saprai far cosa che valga, ti troverai in grande imbarazzo e per conseguenza in non poche strettezze⁴.

Saranno l'espansionismo coloniale, poi la guerra (a partire dall'impresa di Libia) e il fascismo a imprimere una sterzata significativa con la graduale, ma sostanziale, transizione dall'italiano probò all'italiano nazionalista e militarista. La letteratura epistolare risulta fortemente condizionata dalle vicende della Grande guerra, dall'impegno dei bambini a sostenere il morale dei soldati, dal militarismo che fatalmente accompagnò la militanza infantile e dalle conseguenze che ne derivarono non solo sul piano politico, ma anche su quello sociale (ricorrente fu, ad esempio, il tema degli invalidi e dei mutilati e degli orfani di guerra).

Il fascismo venne di conseguenza e s'impossessò anche della pedagogia epistolare. Il nome di Mussolini, quasi una moderna rock star, ricorre incessantemente: virile, atletico, in sella a un cavallo bianco, oggetto di culto, se non proprio di venerazione⁵. Non è casuale che lo stile epistolare sia scelto per le vicende del balilla Vittorio, il libro di Stato per la quinta elementare che più di ogni altro s'imprese, a giudizio di molti studiosi, nella memoria degli scolari del tempo.

³ *Ibid.*, p. 52.

⁴ *Ibid.*, p. 54.

⁵ *Ibid.*, pp. 154-155.

4. Altre annotazioni meritevoli di attenzione Targhetta riserva alla corrispondenza femminile. All'inizio del Novecento si verifica l'incremento di modelli epistolari nei quali mittente e destinatario sono entrambi 'al femminile': lettere scambiate tra madre e figlia, tra sorelle, tra zie e nipoti, tra amiche. Fenomeno da collegare senz'altro all'aumento dell'alfabetismo delle ragazze, ma in grado di documentare anche – accanto ai consueti inviti alla riservatezza, alla moralità, alla sopportazione e dedizione e alla centralità della figura materna – alcuni mutamenti del costume.

Nelle lettere si trovano i primi cenni, ad esempio, di scelte professionali (l'alternativa è posta tra maestra, sarta e fiorista!), di occupazioni fuori casa, dell'importanza dello studio per assicurarsi una certa indipendenza, in qualche caso addirittura di viaggi, tutti segnali dell'avvio di relazioni esterne all'ambiente domestico e di una percezione della donna in parte diversa – almeno a livello dei ceti borghesi – rispetto alla rigidità del ruolo materno e interamente casalingo tipica dei decenni precedenti.

Elementi innovativi e interessanti, per quanto da non sopravvalutare perché il quadro etico nel quale gli scambi epistolari femminili di svolgono non segnalano apprezzabili cambiamenti, avverte prudentemente l'autore, nei confronti dei «modelli tipici della formazione epistolare del secondo Ottocento: apologia del risparmio, consolazione di fronte alle disgrazie, promozione di valori e atteggiamenti quali la generosità, l'umiltà, la modestia, l'obbedienza»⁶.

Il saggio di Fabio Targhetta costituisce un interessante documento delle nuove frontiere della storia educativa e pedagogica per la capacità di valorizzare fonti fino ad ora inedite, per l'intelligenza dimostrata nel leggerle e nell'interpretarle, per la sperimentazione di nuove prassi metodologiche – quelle informatiche – destinate a ridisegnare alcuni aspetti della storiografia dei prossimi anni.

⁶ *Ibid.*, p. 97.

Storia ed evoluzione. Dai paradigmi scientifici alle nuove frontiere dell'educazione

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History and Evolution: from scientific paradigms to new frontiers of education

ABSTRACT: In this article we have attempted to investigate how, in the second half of the twentieth century, it has come to set up a comparison between the neurobiological paradigm, motivated scientist with a pedagogical one, fingerprint humanist, to the most recent tendencies of transhumanist thought. The critical facility of this essay refers to reflections which start Bateson's epistemology. A setting that, through the theory of knowledge of school in Santiago, evidenced especially by the work of Maturana and Varela, there comes widely argued in its educational implications, with the dense pages of Morin. This is the theoretical framework that supports our argument. The clarification seems important to us because, as we learn from Bateson, the epistemological framework of our thinking determines the questions we ask and the procedures that we follow to find answers, to build solutions to problems, to come up with new ideas. Determines, therefore, the points of view. We started from the hypothesis that the sciences that study the life (neurobiology, cognitive neuroscience, biology) and those dealing with education can not speak foreign languages between them. The most recent studies show that as much life as education shall be on a multiplicity of levels of organization.

EET/TEE KEYWORDS: Education; Evolution; Epistemology; Pedagogical Theory; XX Century.

Introduzione

Questa nostra stagione culturale è caratterizzata dalla pervasività della tecnoscienza a partire dalla manipolazione più minuta della materia sino alla nostra più spicciola quotidianità. Si tratta dell'esito di un lungo processo del quale intendiamo studiare le ultime fasi. Il ruolo dell'educazione è quello di collocare le conoscenze in relazione alla molteplicità dei punti di vista, dei fenomeni e delle loro interpretazioni, poiché il problema di fondo non è più tanto l'estensione del conoscere, quanto la sua capacità di interconnessione.

Nel corso della lunghissima evoluzione che ha portato all'*homo sapiens* la vita sul nostro pianeta così come le strutture neurocerebrali è andata via via acquisendo complessità. Tale molteplicità ha prodotto quella complessità organizzativa neurocerebrale che è approdata alla Coscienza, alla Mente, alla Cultura. Tutto ciò ha molto a che vedere con l'educazione, non solo dal punto di vista dell'ottimizzazione degli apprendimenti o dell'efficacia didattica degli insegnamenti, ma anche con il suo senso profondo e l'epistemologia delle scienze che la studiano. Il nostro tentativo va in questa direzione.

La vita si è organizzata in sempre nuovi livelli strutturali, i quali, intrecciandosi fra di loro hanno dato origine ad un cambiamento che è diventato qualitativo. La coscienza ha potuto emergere solo ad un alto livello di organizzazione per livelli differenti e di complessità delle strutture cerebrali. La natura è qui colta nella sua accezione di «matrice totale»¹, in base al processo secondo il quale ogni organismo, *tras-formandosi*, fa di se stesso un'immagine della natura. Scrive, in proposito, Bateson: «La storia naturale microcosmica a cui tutte le piccole storie naturali si conformano a un punto tale che, se se ne capisce una piccola, si hanno indicazioni per capire quella grande»². Infatti, la complessità è un'organizzazione a vari livelli di aggregazioni significanti, cioè a dire che le aggregazioni sono tali in base ad una logica, esistono nessi di significato che uniscono i loro singoli elementi, esistono familiarità e simpatie. L'aumento degli elementi e delle loro aggregazioni implica necessariamente l'aumento delle interrelazioni. in modo tale che gli effetti di questo intreccio «danzante»³ si propagano e si sommano. Ne consegue che l'aumento delle interconnessioni porta all'aumento dell'intensità energetica, ovvero, del flusso di informazioni che, negli esseri viventi, 'danza' fra le varie cellule e i loro raggruppamenti entro un dominio di coerenza. Per dominio di coerenza si intende la configurazione strutturale dinamica che sottende, per esempio, la trama delle sinapsi neuronali.

¹ Cfr. G. Bateson, *Una sacra unità. Altri passi verso un'ecologia della mente*, Milano, Adelphi, 1997.

² *Ibid.*, p. 354.

³ Il termine «danza di relazioni» è stato coniato da Gregory Bateson ed è la struttura portante della sua epistemologia. Cfr. G. Bateson, M.C. Bateson, *Angels Fear. Toward an Epistemology of the Sacred*, New York, Macmillan, 1987; G. Bateson, *Mind and Nature: A Necessary Unity*, New York, Dutton, 1979.

Si tratta dello schema organizzato che dà vita a quell'unità di elaborazione centrale che è il cervello o che sottende la 'forma' degli organismi viventi a partire dai più semplici come, per esempio, i batteri. Insomma, come sostiene Boncinelli: «ogni essere vivente è una trappola per catturare informazioni»⁴. Questo, a nostro modo di vedere sancisce una sorta di continuità di significato fra vita e formazione. Gli organismi, anche i più elementari, per vivere devono acquisire informazioni dal e sul contesto nel quale vivono. Da questo punto di vista, la conoscenza e dunque la formazione rappresentano una necessità della vita. La vita stessa per sussistere non può che compiere atti cognitivi. È per questo che, sul piano dell'epistemologia pedagogica, possiamo ragionevolmente affermare che la conoscenza è una struttura ontologica della vita. Senza conoscenza non può esserci alcun atto vitale. È in questo senso che Maturana e Varela sostengono che ogni atto vitale è un atto di cognizione⁵. Ed è qui che si postula la necessità epistemologica di un confronto serrato fra paradigmi che anticamente si sono configurati come opposti: da una lato il paradigma scienziata, dall'altro quello umanista.

Molti esempi possono essere portati del pensiero seicentesco, in cui nasce la scienza moderna, di questo coinvolgimento emotivo e affettivo, che va là di là della ragione e genera un vero e proprio entusiasmo, come nel caso di Galilei quando afferma che il «corpo lunare» è «Bellissima cosa e oltremodo a vedersi attraente»⁶, aggiungendo poco oltre di aver osservato le stelle con «incredibile godimento dell'animo». Lo stesso entusiasmo «sognante» per la ricerca è riscontrabile in Bacone, nella concezione del «domino di tutto il genere umano sull'universo», che è superiore sia all'ambizione di accrescere la potenza della patria, sia di quella di estendere il potere della nazione sul genere umano. È nota, per altro, la conclusione del filosofo inglese, spesso ignorata: «alla natura non si comanda che ubbidendole»⁷.

Ma l'esempio simbolicamente più rilevante che vorremmo addurre è quello di Giordano Bruno, la cui morte sul rogo per eresia inaugura questo secolo così fecondo per la scienza. Egli, filosofo e non scienziato, entusiastico sostenitore del copernicanesimo, offre un contributo fondamentale agli sviluppi della ricerca astronomica, poiché ha il coraggio di teorizzare che l'universo può essere infinito nello spazio, dato che non vi è alcuna ragione che lo impedisca. Le rassicuranti sfere celesti che, come muri di una fortezza, dovevano cingere gli spazi gerarchici del rapporto uomo-Dio, crollano sotto l'impulso di una riflessione innovativa che Copernico non aveva nemmeno osato sfiorare. Allo stesso modo la terra non è al centro dell'universo, ma un mondo come tanti altri, perché «l'eccellenza di Dio» si manifesta non in un pianeta ma «in duecentomila, dico

⁴ E. Boncinelli, *Il cervello, la mente e l'anima*, Milano, Mondadori, 2000, p. 53.

⁵ Cfr. Maturana, Varela, *Autopoiesis and Cognitions*, cit., p. 46.

⁶ G. Galilei, *Sidereus nuncius*, a cura di A. Battistini, Venezia, Marsilio, 1993, p. 84.

⁷ F. Bacone, *Nuovo Organon*, I, in *Novum Organum*, a cura di E. De Mas, Bari, Laterza, 1968, p. 102.

in infiniti» e, come se non bastasse, vi saranno sicuramente mondi più belli del nostro, abitati da gente migliore. Di qui anche l'incitamento ad un'etica dell'azione che rende l'uomo simile a Dio, ossia creativo, produttivo, per nulla dedito alla mera contemplazione e ossequioso all'idea dominante di un mondo chiuso, protetto da mura come le città medioevali⁸. Infine Pascal, scienziato e filosofo, ci richiama alla nostra fragilità e incertezza, che avverte un bisogno psicologico di stabilità nonostante il desiderio inarrestabile di inseguire il vero: «Noi bruciamo dal desiderio di trovare un assetto stabile e un'ultima base sicura per edificarci una torre che s'innalzi all'infinito; ma ogni nostro fondamento scricchiola, e la terra si apre fino agli abissi»⁹. Argomento spinoso questo, ce ne rendiamo conto, visto che il filosofo della *rêverie* ha più volte insistito sulla necessità della separazione epistemologica tra razionalità scientifica e forme del pensiero atte a frenarla o a deviarla dal suo cammino. Per lui la fenomenologia non è meno dannosa del più unilaterale empirismo, dal momento che pone la necessità di tornare al soggetto, al suo vissuto e, più in generale, al mondo della vita.

1. *Passato remoto*

Un sistema vivente è un sistema che si *tras-forma*, che muta producendo e metabolizzando differenze:

Concentrando la nostra attenzione sui batteri, i sistemi viventi più semplici, – scrive in proposito Capra nello spiegare le caratteristiche che li definiscono – abbiamo caratterizzato una cellula vivente nei termini di una rete metabolica chiusa a livello di struttura organizzativa, circondata da una membrana e capace di autogenerarsi. In questa rete sono inclusi diversi tipi di macromolecole altamente complesse: le proteine strutturali; gli enzimi che agiscono come catalizzatori nei processi metabolici; l'RNA, il messaggero che trasporta l'informazione genetica; il DNA, che conserva l'informazione genetica ed è responsabile dell'autoreplicazione della cellula¹⁰.

La cellula vivente più elementare è già strutturata nella sua differenziazione, ed è proprio tale intima molteplicità che le consente, con la possibilità della vita, la relazione con l'esterno. La comunicazione, che avviene attraverso la membrana, le permette di introiettare energia in termini di alimento e informazioni. Così

⁸ Il riferimento etico è tratto da G. Bruno, *Spaccio della bestia trionfante*, in Id., *Dialoghi italiani*, a cura di G. Gentile, Firenze, Sansoni, 1958. Per quanto riguarda la concezione bruniana dell'universo, si veda il dialogo III di *De infinito universo et mundi*, sempre edito da Sansoni e la *Cena delle ceneri*, in *Opere italiane*, a cura di G. Gentile, Bari, Laterza, 1907, Vol. I.

⁹ B. Pascal, *Pensieri*, Milano, Mondadori, 1985.

¹⁰ F. Capra, *La scienza della vita. Le connessioni nascoste fra la natura e gli esseri viventi*, Milano, BUR, 2004, p. 66.

lo scambio energetico che l'organismo vivente – ogni organismo è in realtà un sistema – intreccia con il suo ambiente può essere definito come un atto cognitivo. Allo stesso modo, ogni cognizione è, al contempo, una creazione, come ancora ci suggerisce Morin, ossia un'azione generativa¹¹.

Si profila così una visione sistemica della vita e della conoscenza, che già era stata annunciata negli anni sessanta da Gregory Bateson¹², e che coinvolge tutti gli esseri viventi in quanto rappresenta la condizione della vita:

Ciascun organismo – scrive Sergio Manghi, profondo conoscitore dell'opera batesoniana – potremo dire, per poter elementarmente sopravvivere e riprodursi, deve saper ricavare attimo dopo attimo, dal coacervo delle infinite informazioni possibili, un qualche quadro del contesto in cui si trova a vivere e ad agire. Un quadro che renda compatibile la propria biografia, nell'irripetibile singolarità dell'attimo, con tutto quel che gli sta accadendo dentro e intorno. Nessuna realtà esterna preconfezionata gli può fornire le informazioni per questo quadro. D'altra parte, nessun genoma interno gli può fornire istruzioni adeguatamente preconfezionate, per quell'attimo irripetibile e sempre in qualche misura imprevedibile. La combinazione tra vincoli interni ed esterni non può che essere un atto creativo¹³.

La cognizione quindi è energia, scambio, mutamento, autorinnovamento e trasformazione, cioè: autopoiesi. Cosa significa? Significa che ogni vivente si accoppia strutturalmente con il suo ambiente attraverso delle interazioni che innescano dei cambiamenti sistemici, ovvero, tanto nell'individuo, quanto nel contesto. Ed è proprio tale 'accoppiamento' strutturale che segna il confine fra vivente e non vivente. In questo, il contributo degli studi di Capra è stato essenziale¹⁴. Insomma, come sostiene anche Morin¹⁵, ogni organismo è un sistema il cui scambio energetico con l'ambiente può essere definito come un atto cognitivo. Un atto che produce conoscenza. Ma, se questo è vero, allora le scienze che studiano la vita e quelle che studiano l'educazione devono imparare a dialogare, a porre a confronto i loro paradigmi e confrontare le loro epistemologie.

Di più, dato che la visione del mondo è, in gran parte l'esito di una costruzione che, nella comunità, riveste un ruolo identitario, la tecnoscienza agisce come una sorta di coscienza preliminare, presente in tutte le relazioni che intrecciamo con il nostro mondo¹⁶. Cosa intendiamo per conoscenza? si tratta

¹¹ E. Morin, *La méthode*, Tome 2: *La vie de la vie*, Paris, Seuil, 1980 (trad. it. *La vita della vita*, Milano, Feltrinelli, 1987).

¹² Bateson, *Mind and Nature*, cit.

¹³ S. Manghi, *La conoscenza ecologica. Attualità di Gregor Bateson*, Milano, Raffaello Cortina Editore, 2004, p. 35.

¹⁴ Cfr. Capra, *La scienza della vita. Le connessioni nascoste fra la natura e gli esseri viventi*, cit.

¹⁵ Cfr. Morin, *La méthode*, cit.

¹⁶ Cfr. F. Sancén Contreras (ed.), *Aportaciones al estudio de la cosmovisión*, México D.F., Editores Universidad Autónoma Metropolitana-Unidad Xochimilco, 2009.

di un fenomeno dinamico sia perché si muove sia perché produce cambiamenti tanto negli individui quanto nei contesti.

Per vivere abbiamo bisogno di elaborare un quadro del mondo compatibile con la nostra biografia del contesto in cui viviamo. Nessun genoma ci può fornire tutto il necessario per definire tale elaborazione, per il semplice motivo che la realtà nella quale ci muoviamo è in movimento e sempre possono insorgere sia variabili che imprevisti. Per questo motivo possiamo giungere alla conclusione che ogni atto cognitivo è anche un atto creativo. Ma, la conoscenza ha anche funzione di autoconservazione, perché, in questo gioco orientante, ci aiuta a sopravvivere e a costruire un ambiente-mondo adatto alla nostra vita. Ed è proprio questa la funzione della scienza e della tecnologia, che sono prodotti della conoscenza, non gli unici, poiché esiste anche una conoscenza di natura spirituale che, maggiormente, si avvale della dimensione estetica¹⁷.

L'attività della mente è tutta in questo gioco di interrelazione fra gli individui e l'ambiente perché tali interrelazioni sono atti cognitivi. Ma, se, in questo senso, possiamo affermare che l'attività mentale è immanente a tutti gli organismi, qualsiasi sia la loro complessità biologica, dunque anche in quegli esseri che sono privi di un sistema nervoso, cosa distingue gli umani? L'opzione di scelta sulla base dell'attribuzione di valore. Tale facoltà è alla base dell'agire etico e si avvale della capacità di astrazione, ovvero della possibilità di creare simboli. I simboli sono spazi di organizzazione ed elaborazione di nozioni e concetti che ci consentono di conservare un gran numero di dati conoscitivi e, infine, di costruire una semantica. Anche in questo caso si tratta di una facoltà emergente: la semantica è una facoltà emergente dei simboli e della loro capacità di aggregare, integrare e organizzare i concetti. Ma lo è anche la coscienza, ovvero, la consapevolezza della situazione, del contesto e del mondo come di un tutto integrato. L'autocoscienza è la coscienza di sé entro tale consapevolezza.

Ad un certo livello dell'attività mentale, emerge la coscienza e, con essa, la facoltà di compiere delle scelte sulla base di un giudizio, il quale, a sua volta, agisce con il criterio dell'attribuzione di valore. In breve: io adotto un certo comportamento, agisco in un determinato modo sulla base di un'attribuzione di valore. Tale attribuzione risponde alla domanda: «a cosa mi serve?», solo ai suoi livelli più elementari e immediati, perché si tratta di un'attribuzione di valore che tiene in considerazione la dinamica relazionale più semplice. La mente può essere definita come processo che può essere osservato e vissuto tanto dall'esterno, quanto dall'interno. La mente esprime una capacità: l'intelligenza che consiste nell'individuare nessi, anche reconditi, fra situazioni, fenomeni, contesti.

¹⁷ Su questo concetto, in particolare, si vedano i saggi: A. Gramigna, M. Righetti, C. Rosa, *Estetica della formazione. La bellezza nella conoscenza*, Milano, Unicopli, 2008; A. Gramigna, M. Righetti, *Inquietudini euristiche. Saggi di estetica della formazione*, Bologna, Clueb, 2010.

La reattività della nostra mente – come di qualsiasi vivente – consiste nella intensità e nella densità del flusso di informazioni. L'unità di elaborazione entrante della mente è il cervello. Il cervello è un'organizzazione reticolare di cellule interconnesse: cellule vincolate da miliardi di nessi 'solidali', ovvero, da sinapsi che trasportano il flusso informativo captato dai sensori e ne consentono l'elaborazione. Ma il nostro cervello non fotografa la realtà: la interpreta. Secondo Richard Gregory noi riceviamo vaghe immagini degli oggetti che ci circondano, i nostri occhi percepirebbero forme distorte e imprecise, ma poiché la visione è un atto creativo, attraverso gli stimoli che colpiscono la retina, creiamo un mondo ordinato di cose distinte¹⁸. La nostra mente interpreta quello che i sensi percepiscono, elabora chiavi di lettura, narrazioni. Come? Individuando delle regolarità, cercando delle coerenze, stabilendo dei nessi causali.

I nostri meccanismi cognitivi di base sono tesi alla individuazione di regolarità. Allo stesso modo, poiché i circuiti neuronali lavorano sia in serie che in parallelo, ci inducono ad costruire un ordine nel mondo attraverso quelle categorie che conosciamo come tempo, spazio, causalità, e poi, colore, odore, suono. Insomma, noi costruiamo il nostro approccio con il reale sulla base di un andamento, potremo chiamarlo anche programma, che è biologico ma che si è venuto strutturando nel rapporto con l'ambiente. Come dire che la mente «interpretante» si forma mentre *tras-forma* il suo campo cognitivo e, con esso, il mondo; il quale si manifesta ai nostri sensi in qualità di rappresentazione, che è una forma dell'interpretazione. In questo senso, potremo arrivare a sostenere che il *bios*, la natura della vita, si dipana attraverso un processo che è sostanzialmente interpretativo. Ma questo già ce lo aveva spiegato Gadamer, in *Verità e metodo*¹⁹, quando sosteneva che l'interpretazione è la forma di ogni esperienza del mondo, mettendo definitivamente in crisi ogni pretesa di oggettività sia del metodo scientifico sia della conoscenza che produce. La nostra coscienza percettiva è la creazione di una mente interpretante. Il mondo, con ogni probabilità, non è come lo vediamo²⁰. La mente risponde con una maggiore lentezza agli automatismi del cervello, infatti, se, in un certo senso, ottimizza ed esalta la funzione del cervello, da un altro punto di vista, lo limita. Propone reazioni lente là dove l'istinto sollecita risposte automatiche e veloci.

La conoscenza, frutto dell'interazione complessa fra sensi e cervello, inventa delle regolarità, delle rappresentazioni, delle astrazioni, che ci aiutano a orientarci nel mondo, ad adattarci al suo dinamismo, ad affrontare i problemi che ci pone. Così, se è vero che, in un certo senso, la conoscenza è mappata nel

¹⁸ R.L. Gregory, *Eye and Brain. The Psychology of Seeing*, London, Weidenfeld and Nicolson, 1966; trad. it. *Occhio e cervello. La psicologia del vedere*, Milano, Raffaello Cortina Editore, 1988.

¹⁹ H.G. Gadamer, *Verità e metodo*, Milano, Bompiani, 1972. Cfr. anche Id., *Ermeneutica e metodica universale*, a cura di U. Margiotta, Genova, Marietti, 1973.

²⁰ Cfr. M. Merleau-Ponty, *Fenomenologia della percezione*, Milano, Bompiani, 2003.

nostro sistema nervoso, è vero anche il contrario, ovvero che il nostro sistema nervoso si *tras-forma* attraverso le esperienze che il mondo gli pone. Il sistema nervoso è composto di tessuto neurale. Il cervello è il sistema nervoso centrale in quanto è collegato ad ogni punto del nostro corpo attraverso i nervi, che sono fasci di assoni. I saperi dell'educazione devono sondare questi meccanismi per elaborare le strategie di ottimizzazione degli apprendimenti e per rinnovare criticamente la propria epistemologia.

La scuola, l'Università, i centri di ricerca, le varie istituzioni educative, il lavoro dovrebbero concorrere nell'elaborare una descrizione sempre elastica ma soddisfacente (cioè in grado di fornirci una mappa di orientamento) del contemporaneo. Abbiamo bisogno di un sistema concettuale dinamico ed ecologico del contesto socioculturale cui apparteniamo. Tale necessità non può che fare riferimento, da un punto di vista formativo, ad una dinamica di 'assimilazione' delle esperienze e, al contempo, di "accomodamento" del sistema – che è ermeneutico – di comprensione del suo mondo²¹. In breve: dovrebbe costruire una struttura dinamica di interpretazione della realtà che contempi le strategie di una sua costante revisione. Si tratta di costruire – come prodotto e anche come atteggiamento cognitivo – un sistema cangiante e complesso che genera i propri stessi meccanismi regolatori, i quali dovrebbero avere una capacità di retroazione. Quali sono tali congegni regolatori? I valori, le sinestesie, le condizioni di stabilità della struttura di riferimento, i processi di integrazione dei dati informativi acquisiti.

Poiché il sistema nervoso non opera "catturando" dati dal mondo esterno, ma li filtra, li interpreta e li elabora, è ingenuo pensare che se ne ricavi una descrizione oggettiva del mondo²². La nostra epistemologia, dunque, implica un approccio ermeneutico, nella consapevolezza, appunto, dell'ineludibile relativismo della stessa percezione:

Passiamo la vita a combattere questa instabilità e il nostro sistema nervoso è geneticamente predisposto a mantenere coerente la percezione di stimoli che si modificano costantemente. L'astrazione, ossia la nostra capacità di formare un'idea generale a partire dal particolare gioca un ruolo fondamentale nel compito che il nostro cervello svolge per mantenere una costanza percettiva²³.

²¹ È evidente l'impronta del modello piagetiano. Cfr. J. Piaget, *L'epistemologia genetica*, Roma-Bari, Laterza, 2000. Nello specifico ci sembra interessante il libro di F. Aqueci, *Ordine e trasformazione. Morale, mente, discorso in Jean Piaget*, Acireale-Roma, Bonanno, 2003.

²² Facciamo qui riferimento alla teoria di Maturana, medico e dottore in Biologia, che a nostro avviso è uno fra i primi e più importanti studiosi ad aver argomentato sulle basi biologiche della conoscenza e sulle sue implicazioni pedagogiche. Cfr. H. Maturana, *La realidad objetiva o construida? II. Fundamentos biológicos del conocimiento*, Barcelona, Universidad Iberoamericana – ITESO – Anthropos, 1997; H. Maturana, B. Pörkensén, *Del ser al hacer. Los orígenes de la biología del conocer*, Santiago de Chile, J. C. Sáez, 2004.

²³ L. Lumer, S. Zeky, *La bella e la bestia: arte e neuroscienze*, Roma-Bari, Laterza, 2011.

Le regolarità attraverso le quali inventiamo leggi scientifiche, cartine stradali e ricette di cucina sono tentativi più o meno efficaci di governare l'ambiguità del reale. Già il premio Nobel per la medicina Francois Jacob²⁴, ci aveva mostrato che il nostro cervello crea una propria immagine della realtà, filtrandone solo certi aspetti. La conoscenza dunque ha a che vedere con questa costruzione che, ripetiamo, è una interpretazione. Le ragioni di questa selezione dei dati, che vengono prima filtrati, poi interpretati e ricostruiti, risponde ad una esigenza di tipo biologico. Infatti, la percezione dipende dagli organi che sovrintendono i nostri sensi e dall'opera di integrazione che il cervello pone in atto. In breve, potremo affermare che abbiamo una conoscenza intuitiva del mondo esterno. Tale conoscenza, che è una costruzione del sistema nervoso, rappresenta una sorta di modello per scegliere, stoccare ed organizzare le informazioni nel modo più conveniente. Ma, questa impronta 'pragmatica' non deve trarci in inganno; infatti, se è vero che la costruzione della conoscenza ha una origine pragmatica, cioè legata alla necessità di preservare nel migliore modo possibile la sopravvivenza, è anche vero che lo sviluppo della conoscenza e della cultura giunge ad esiti di elaborazione e di astrazione che svettano ben oltre il raggiungimento di questo scopo. L'evoluzione della conoscenza e dei suoi prodotti, alcuni dei quali possono seriamente mettere in pericolo la vita dell'intero pianeta, ci mostra la tendenza ad allontanarsi da questo implicito primigenio di carattere biologico. Tale allontanamento, tale apparente libertà dall'urgenza della sussistenza approda tanto alle più sublimi forme d'arte come alle più sofisticate armi di distruzione di massa. Se è vero che lo sviluppo tecnoscientifico ha portato enormi vantaggi sul piano della qualità della vita, è anche vero che l'enorme potenziale di conoscenza messo oggi a disposizione dalla scienza non ha ancora raggiunto l'obiettivo – ammesso che sia mai stato tale – di sconfiggere la fame del mondo.

Confortati dagli studi che abbiamo citato e in coerenza con la prospettiva ermeneutica che da anni sostiene le nostre ricerche, siamo convinti che, se le esperienze attivano i processi di conoscenza del reale, tuttavia, non ne determinano la loro oggettiva determinazione. Se questo è vero, ne consegue che la conoscenza è un processo che si dipana lungo le correlazioni che intersecano il mondo al nostro sistema di rappresentazione, il quale è strettamente connesso al sistema neuronale. A noi sta di valutare, con la massima competenza possibile, la loro intrinseca coerenza, in relazione, sia al nostro sistema culturale e biologico di riferimento, sia ai contesti nei quali ci muoviamo. A noi sta verificare la resistenza e la coerenza della rete strutturale che organizza, con la nostra epistemologia, la nostra stessa cognitività.

Rimandare o rinunciare ad un piacere in vista di un bene futuro, per noi o per il nostro prossimo, implica il coinvolgimento della coscienza nel processo della decisionalità. La valutazione che motiva questa scelta presuppone

²⁴ F. Jacob, *Il gioco dei possibili*, Milano, Mondadori, 1983.

l'immaginazione di un 'bene' futuro per sé e/o per gli altri. È una sorta di previsione che presuppone l'immaginazione di quanto deve ancora accadere: quella che Rodolfo Llinás definisce come «la massima funzione cerebrale»²⁵. I primi studi sul tema sono degli anni '90 del secolo scorso. In quegli anni, il gruppo diretto da Giacomo Rizzolatti presso l'Università di Parma, studiava i neuroni motori dell'area pre-motoria del lobo frontale dei macachi, osservando che certi gruppi di neuroni si attivavano solo se determinati movimenti – come afferrare un cibo – erano finalizzati ad un obiettivo. Si ipotizzò così l'idea che l'area pre-motoria interessata contenesse una sorta di vocabolario di atti finalizzati. Si verificò poi che esistevano neuroni che si attivavano quando era chiara l'intenzione del soggetto osservato di compiere una determinata azione. Se ne dedusse che i neuroni a specchio genererebbero una sorta di rappresentazione dell'azione osservata che preluderebbe alla capacità di comprendere la suddetta azione, nonché di apprendere per imitazione. Cosa significa? Significa che, in tal modo, i macachi – ma anche i bambini – imparano a riprodurre una sequenza osservata proprio grazie all'agire di tali neuroni che genererebbero un'attivazione interna dell'atto osservato. Se è vero che questo non è l'unico meccanismo che sottende l'apprendimento per imitazione, è senz'altro plausibile pensare che sia il modo più semplice, più diretto e forse più antico, dal punto di vista dell'evoluzione. Di più, Rizzolatti e Ardib ritengono che possa essere il substrato neurologico sul quale si è evoluto il linguaggio²⁶. Partendo dall'ipotesi che il linguaggio si sia sviluppato da un precedente sistema comunicativo di tipo gestuale, gli autori hanno constatato che il processamento linguistico coinvolge regioni motorie congruenti con il contenuto semantico. Il dibattito su questi temi è ancora aperto e, in parte, controverso, tuttavia, è certo che questo raffinato congegno cosiddetto dei «neuroni specchio» è coinvolto nei meccanismi dell'apprendimento.

In generale, questo può significare che il nostro sistema cervello-mente si è evoluto via via specializzandosi nel valutare i nostri interessi, ma anche quelli del nostro 'prossimo': figli, parenti, amici, gruppo, comunità, ecc.. Sembra inoltre di poter sostenere che questa 'competenza sociale' segue di pari passo lo sviluppo della cerebralizzazione, l'insorgere della Coscienza, e poi, della Coscienza della Coscienza. E non è tutto, perché è innegabile che nelle prassi di solidarietà sociale, nelle varie forme di attaccamento e di cura, insorgano emozioni, sentimenti, empatie, desideri, tolleranze che vanno di pari passo con la capacità di previsione e di cooperazione. Il che significa che la cerebralizzazione è densa di tensioni affettive. Infatti, le emozioni – siano o meno consapevoli – svolgono un effetto prolungato nel tempo se si mutano in sentimento ed approdano alla coscienza. Cioè a dire che solo con la chiara percezione di un senso del sé il

²⁵ R. Llinás, *I of the Vortex: from Neurons to Self*, Cambridge, The MIT Press, 2001.

²⁶ G. Rizzolatti, M.A. Arbib, *Language within our grasp*, «Trends Neurosci», n. 5, 1998, pp. 188-194.

soggetto giunge alla consapevolezza dei sentimenti che prova. In questo senso e citando una bella espressione di Damasio, possiamo affermare che il sentimento è l'esperienza mentale dell'emozione²⁷.

Le emozioni ed i sentimenti hanno una base biologica comune. Le emozioni sono catene di risposte chimiche e neurali, pertanto sono processi biologici che dipendono da dispositivi cerebrali innati. Esse rappresentano una risposta specifica ad una situazione induttrice. Il dolore ed il piacere rispondono agli scopi adattivi del programma biologico, ci segnalano una disfunzione, un pericolo, oppure la soluzione di una difficoltà o l'appagamento di un bisogno.

La capacità di immaginare quello che ancora non esiste – o di prevedere le conseguenze di un dato comportamento – implica la possibilità di predire le azioni altrui, di interpretarne le reazioni, gli stati d'animo, i sentimenti e le intenzioni. È questa la tensione empatica dell'intelligenza, che sfuma in competenza sociale e che si nutre di una tensione emozionale. Si è visto come, alla base della capacità di comprendere gli stati mentali degli altri, ci siano i meccanismi cerebrali che fanno capo ai neuroni specchio²⁸, i quali, s'è detto, sottendono la comprensione di un'intenzione o di un fine.

Il meccanismo neuronale che potremo chiamare 'empatico', con ogni probabilità, è uno fra gli elementi biocognitivi che sottostanno alle nostre competenze sociali, alle nostre scelte morali, alla capacità di prendere decisioni, perché ci aiuterebbero a comprendere le intenzioni dei nostri simili. Il mio cervello imiterebbe i segni esteriori di uno stato (per esempio di sofferenza o di paura), facendomi percepire in parte la stessa emozione e dunque riconoscendola. In breve: il circuito dell'imitazione simulerebbe le espressioni emozionali facciali di altri soggetti. Questo congegno appartiene al sistema neurocognitivo sotteso alla comprensione, previsione e gestione delle relazioni fra individui. Questa esperienza condizionerebbe l'attività nel sistema limbico, area nella quale l'emozione associata con una data espressione è percepita dall'osservazione²⁹. Il costante processo decisionale del nostro cervello opera una sorta di sedimentazione delle soluzioni ai problemi che via via affronta. Tale sedimentazione potrebbe essere definita come una conoscenza, ovvero un apprendimento che gli fornisce uno schema d'azione, sia pure suscettibile di continui assestamenti. Le abitudini hanno molto a che vedere che tali schemi d'azione.

Tutto ciò ha evidenti ricadute non solo nell'ambito delle competenze sociali, ovvero delle norme che regolano e organizzano nei vari contesti le relazioni fra individui e comunità, ma anche, nel campo più generale della formazione, per le risonanze che questi apprendimenti riverberano nella sfera esistenziale. Altre

²⁷ A.R. Damasio, *Emozione conoscenza*, Milano, Adelphi, 2003, p. 59.

²⁸ G. Rizzolatti, C. Sinigaglia, *So quel che fai. Il cervello che agisce e i neuroni specchio*, Milano, Raffaello Cortina Editore, 2006.

²⁹ Cfr. M. Iacobini, *Neurobiology of imitation*, «Current Opinion in Neurobiology», n. 6, 2009, p. 663.

considerazioni interessanti si possono estendere all'ambito dei valori morali, dei costumi, degli usi. La valutazione, scrive ancora Patricia Churchland:

si radica nelle emozioni, nelle passioni che sono endemiche della natura umana e nelle abitudini sociali acquisite durante d'infanzia. I processi valutati vi impiegano la memoria e attingono dalla capacità di risolvere problemi. La ragione non crea valori, ma si modella attorno ad essi e li induce in nuove direzioni³⁰.

Insomma, il vivere sociale è strettamente legato alla capacità del nostro cervello di apprendere, ma, al contempo è grazie al processo di cerebralizzazione che hanno origine le prime forme culturali di socializzazione. Due facce della stessa medaglia. Esiste una dimensione genetica della morale ed una dimensione morale della genetica. Ci sono dei fondamenti biologici che sono modellati sia dall'ecologia locale del contesto, sia dai suoi sviluppi culturali ed educativi.

Ma, quello che ci sembra chiaro è che esiste un affascinante processo evolutivo che, via via, porta alla Coscienza. Nella Coscienza, attenzione, memoria e apprendimenti sono momenti importanti di sviluppo che rappresentano un processo le cui fasi sono difficilmente separabili. Una sorta di interazione relazionale e processuale la cui sinergia riverbera su tutti gli elementi in gioco i suoi dinamismi e le sue innovazioni. Di certo, possiamo affermare che il comportamento etico, la scelta morale, l'opzione di valore, hanno origine nella coscienza. E la conoscenza ne rappresenta, ad un tempo, uno strumento d'azione e d'espansione.

2. *Il futuro imminente*

Il movimento dei transumanisti postula la possibilità, anzi, la certezza che la tecnologia forgerà una nuova umanità implica l'assunzione di responsabilità niente di meno che nel «ri-progettare la condizione umana». Gli scopi di tale alto disegno mirano ad «evitare l'inevitabilità del processo di invecchiamento, le limitazioni dell'intelletto umano». Lo sfondo, per così dire, etico di questi presupposti riguardano «il diritto individuale di espandere le capacità fisiche ed intellettuali e di aumentare il controllo sulla propria vita», ovvero: «ad una crescita personale ben al di là delle limitazioni biologiche a cui siamo legati». Infine, il settimo principio recita che «il transumanesimo è fautore di benessere di tutti gli essere senzienti (siano questi umani, intelligenze artificiali, animali o eventuali extraterrestri)». Il soggetto umano è dunque l'essere senziente, cosa che abbiamo visto avere radici consolidate, ma, in questo quadro di significazione, sarebbero senzienti anche le intelligenze artificiali, gli animali (tutti?) e gli

³⁰ P.S. Churchland, *Neurobiologia della morale*, Milano, Raffaello Cortina Editore, 2012, p. 194.

extraterrestri (umanoidi o appartenenti ad altra fauna?). Cosa distinguerebbe il soggetto umano senziente dagli altri esseri non umani senzienti, visto che tutti godono del diritto alla propria perfettibilità tecnologica? Probabilmente la volontà di perfettibilità che l'intelligenza tecnologica renderebbe altamente proficua. Se ne deduce che gli animali e le intelligenze artificiali non avrebbero per ora tale autonomia di decisione, ma ne godrebbero i benefici grazie all'intervento dei soggetti umani. Insomma, il soggetto è colui che decide di applicare i procedimenti e i prodotti della tecnoscienza per superarsi. Questa azione autopoietica di perfettibilità lo definisce in un nuovo status. È questa decisionalità che lo distingue dagli animali e dalle intelligenze artificiali; non sappiamo cosa dire degli extraterrestri. L'idea di soggetto sembra qui riprendere la sua vecchia unità ora garantita da tale diritto decisionale di 'riprogrammarsi' sia a livello fisico che intellettuale che psicologico. È un soggetto che si crea, anzi che si ri-crea, perché così come è nato non si piace affatto. È un soggetto che sconfigge l'invecchiamento e forse la morte, che si fa migliorandosi costantemente non più per giungere alla propria aretè, virtù morale per eccellenza, ma per sorpassare tutti i limiti imposti dalla natura. Il proprio autoperfezionamento attiene prevalentemente alla sfera di una fisicità che, grazie alle nuove tecnologie, si rigenera. Questo significa che gli ambiti d'intervento educativo ai quali eravamo abiruati a pensare cambiano radicalmente. L'educazione avrebbe dilatato la sua potenzialità tecnica in intervento tecnologico vero e proprio. La trasformazione non è più opera paziente di lunghi addestramenti educativi, è manipolazione tecnica del corpo, della mente, della psiche.

Questa decisionalità autopoietica è il frutto più recente della razionalità tecnologica. Il soggetto è un essere razionale tecnologico che opera su di sé e sull'umanità senza limiti, ovvero che può legittimamente intervenire sulla struttura stessa della vita e portare nel breve giro di pochi anni a cambiamenti epocali.

Ma, se la razionalità ritrova qui il suo imperio definitorio, quasi ontologico, la corporeità emerge in un rinnovato protagonismo. Essa diviene la materia sulla quale la ragione tecnica agisce per ottimizzarne tutte le prestazioni, oltre i limiti dell'età e della vita stessa, così come sino ad ora la si è concepita. Il corpo diviene un oggetto tecnologico e, in questo, perde la sua originaria e individuale unicità. Tutti, indipendentemente dalla nostra genetica e dai nostri talenti, possiamo diventare forti, attraenti e immortali, secondo schemi che la scienza contemporanea traccia per la nostra felicità. Infatti, sostiene Max More «la morte è un'imposizione sulla razza non più tollerabile», mentre Kevin Davis arriva ad affermare che «bisogna riscrivere il linguaggio di Dio»³¹. In questo contesto, l'educazione con i suoi tempi lunghi e l'alea di una soggettività che sempre sfugge ai determinismi, sembra perdere importanza.

³¹ Cfr. Redazione, *Estinzione degli sciocchi e figli forti, attraenti. Ecco il transumanesimo*, «Il Foglio», 8 marzo 2005.

Il soggetto del mondo futuro dovrà avere un'altissima alfabetizzazione tecnologica, dovrà conoscere i linguaggi e le logiche tecnoscientifiche che hanno forgiato il suo mondo e, forse, la sua umanità. Perché, se ci saranno i tecnocrati che a seconda delle proprie specializzazioni interverranno sulla sua psiche, sulla sua mente, sui suoi geni, ecc. ...? Per capire quello che sta accadendo attorno a lui, per orientarsi nel mondo in cui vive, per fare delle scelte con cognizione. Il Soggetto del futuro dovrà essere un ermenuta supercompetente per 'svelare' le suasioni occulte della retorica scienziata, per smontare le narrazioni tecnoscientifiche e fantascientifiche che popolano il suo immaginario. Perché? Per essere più libero. O, detto, in altri termini, per essere padrone della propria mente. Per decidere cosa fare di sé capendo chi si è e cosa è quella meravigliosa avventura che chiamiamo tecnologia. Perché rispondere alla domanda immeditata del «cosa serve» la tecnologica non serve se non se ne conosce la natura, non si sa cosa è e quale idea ne abbiamo. E per porsi simili interrogativi occorre anche una mente filosofica. Occorre un pensiero libero, plurale. Occorre una educazione che sappia tracciare percorsi di significazione fra i vari ambiti del sapere. L'alfabetizzazione tecnocratica tanto inneggiata dalle politiche scolastiche del mondo Occidentale non è, di per sé, sufficiente a capire il senso della scienza e della tecnologia, la loro destinalità nel contemporaneo, infine, il peso esistenziale che riveste ai nostri occhi. L'addestramento tecnocratico sfugge ai tempi lunghi della comprensione profonda dei fenomeni.

Invece, un confronto analitico fra il paradigma umanista del sapere educativo e quello scienziato delle cosiddette scienze della vita implica una consapevolezza profonda della storicità di tale relazione, di come essa si è venuta configurando nel tempo recente. La nostra riflessione sugli studi di Bateson, sui suoi sviluppi nelle riflessioni di Maturana e Varela, per giungere alle ultime ricerche nel campo della neubiologia ci aiutano a vedere nelle derive transumaniste quella carenza di saggezza sistemica già denunciata negli anni '70 da Gregory Bateson. A questo proposito Bateson avrebbe parlato di intenzionalità miope generata da una «carenza di saggezza sistemica», che spinge il soggetto ad intenzionare il mondo secondo fini che perdono di vista il significato globale della sua esperienza, e che gli impedisce di cogliere, nelle processualità, la 'danza' relazionale e trasformativa nella quale è egli stesso incluso. Si tratta di un agire – ma anche di un conoscere – strumentale, teso al raggiungimento di uno scopo contingente che non tiene conto del contesto, né delle reazioni a catena che vi innesca. La compartimentazione del sapere che ne deriva ci ostacola nella comprensione della globalità dei fenomeni, disconosce il valore epistemico ed etico del principio solidale³².

³² Anita Gramigna, in particolare, ha approfondito questa riflessione nel suo: *I fondamenti di una Pedagogia solidale nelle questioni sociali. Per una ermeneutica della prassi democratica*, in A. Escolano Benito, A. Gramigna, *Formazione e Interpretazione. Itinerari ermeneutici nella Pedagogia sociale*, Milano, Franco Angeli, 2004, pp. 129-150.

Il vivente è dunque sempre dentro il gioco vitale di percepire, leggere, comporre e codificare le informazioni genetiche ed ambientali, entro schemi d'azione plausibili, in costante e mutua compenetrazione con la propria soggettività nel quadro d'insieme. L'elaborazione di tali schemi, il loro intrecciarsi comunicativo e la loro ricomposizione, rappresentano mosse della vita in quanto ne sanciscono la presenza e ne consentono, con lo svolgimento, l'esistenza. Ad un tempo, sono atti cognitivi anche quando si esplicano fuori dalla sfera di ciò che chiamiamo consapevolezza, perché tendono a rendere l'organismo competente per la sua vita in quel contesto. Lo scenario che la ricerca scientifica più recente va elaborando richiede uno sguardo sistemico, un orizzonte concettuale integrato e un vocabolario aperto che ci consentano di interpretare, di narrare e di affrontare la complessità.

L'epistemologia complessa della educazione è quella che 'apprende', ovvero che sa interpretare il cambiamento perché è in grado di riconfigurarsi a fronte della processualità che incontra. È complessa perché contempla un repertorio di processi, di nessi e di strumenti, tanto ampio quanto variamente articolato in strutture differenti. La sua complessità, paradossalmente, rende meno complicata la nostra scelta valoriale, nel senso che ci aiuta a fronteggiare la sensazione soggettiva di difficoltà che il nostro tempo di crisi ci impone. Se la complessità è legata all'aumentare del numero di elementi che segnano il presente, solo un'epistemologia in grado di organizzare l'interazione dinamica di tali elementi e dei loro effetti, può offrirci risposte esaurienti dal punto di vista formativo. Infatti, tale epistemologia è in grado di leggere l'entropia, il disordine che genera incertezza e da cui nasce la sensazione di smarrimento che ci caratterizza, costruendo un dominio di coerenza, cioè estendendo nel tempo e nello spazio una rete di relazioni significanti fra i fenomeni che connotano il nostro mondo. Di più, poiché è in grado di apprendere, sa esercitare una correzione continua della propria azione sulla base dei risultati parziali ottenuti con un effetto virtuoso di carattere moltiplicativo.

La sua rete di strutture è organizzata in una gerarchia elastica, dinamica, fortemente integrata e, ad un tempo, aperta. Si tratta di una impalcatura organizzativa della conoscenza con la quale interpretiamo e costruiamo, ha pertanto una tensione attiva e concreta. Attiva, perché agisce sul reale e attiene sia ai processi, alla acquisizione, alla costruzione, all'organizzazione dei dati conoscitivi. Ed è concreta, perché si riferisce al modo in cui vediamo il mondo, alle domande che ci poniamo quando agiamo e che dirigono la nostra condotta, riguarda le ipotesi della nostra ricerca e i suoi procedimenti. La conoscenza, che è il suo oggetto-ambiente di studio, ci orienta nella giungla di relazioni entro la quale ci muoviamo, ci aiuta a riconoscerle, costruirne di nuove e così tracciare percorsi di significazione; ovvero: nessi solidali. La conoscenza, lungi dal rappresentare l'accumulo di saperi, è in realtà la loro organizzazione. La sua semplificazione – come evidenzia anche Bachelard nel suo libro sul «nuovo spirito scientifico» – non è che l'opera riduttiva di un'epistemologia

ancorata al cartesianesimo. Gli schemi semplificatori hanno dato risposte semplificatrici e unidimensionali a fronte delle emergenze del presente che invece sono globali. Le nostre consolidate tradizioni gnoseologiche quando si sono abbandonate pienamente al determinismo ed alla semplificazione, hanno prodotto un sapere poco solidale dal punto di vista epistemologico ed etico: atomizzazione, anonimizzazione, mercantilizzazione, degrado morale. La perdita di responsabilità morale nei confronti dei prodotti della tecnoscienza (inquinamento, modificazioni genetiche, armi atomiche, ecc. ...) è l'altra faccia della medaglia della perdita di solidarietà, perché ha portato alla disarticolazione del nesso fra individuo e società.

New education and active school in Europe in the early 20th century. Models, themes and figures

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ABSTRACT: The text is about a brief review of a work of interpretation and reconstruction of the characterizing aspects of the complex season of educational, didactic and pedagogic innovation that took place at the beginning of the twentieth century, which led back to the movements of the New Education and the Active School, within the initiatives promoted by the Department of the Educational Process of Catania University that has given the literature of the sector original investigative tracks.

EET/TEE KEYWORDS: New Education; Active School; Experimental Education; Educational Innovation; Italy; Europe; XIX-XX Centuries.

Between the end of the 19th century and the first decades of the 20th century, a new transformation movement turned to impress important and substantial changes to the Italian and European usual thought and educational practice. The echo of this vanguard will be so wide-spreading and elusive that Hameline will define it as a «monument “incontournable”»¹.

A very complex season arose due to the social and political dynamics, which had an important role to set the standards for the current European features as a common desire of renewal and educational regeneration. The pedagogical science was at the centre of a heated debate developed by social and educational ideals of renovation. Therefore, a redefinition of the teaching/learning practices in educational field took shape conveying the modernization driven by the arising new experimental pedagogy.

¹ D. Hameline, *Avant-propos*, in D. Hameline, J. Helmchen, J. Oelkers (edd.), *L'éducation nouvelle et les enjeux de son histoire: Actes du colloque international des Archives Institut Jean-Jacques Rousseau* (Genève, avril 1992), Éditions scientifiques européennes, Berne, Peter Lang S.A., 1995, p. I.

This showed a polychrome context where, however, often strong shades were gathered because of a generalized reading protocol around some common clauses. As a matter of fact, some of the forerunners of education seems to be forgotten outlining a lack of concern about some trends not really appreciated or even unknown. Latest studies, turned towards figures *oubliés* belonging to the Italian pedagogic experimentalism and also presented some aspects not so popular about important characters who remained flat within the standard context of interpretation.

Nowadays, new guidelines of research seem to be outlined, with an ideal continuity of reference profiles offered by important enterprises promoted during the last decade, such as the Spanish conference about *Reformas e innovaciones educativas: España, 1907-1939, en el centenario de la JAE*, organized in Madrid in 2007 and the 26th session of the International Standing Conference for the History of Education entitled *L'Education nouvelle, genèse et métamorphoses*, occurred in 2004 at Geneva University with the support of the *Fondation Archives Institut J.J. Rousseau*.

In the light of these short notes, the hard interpretation and rebuilding process of the outlining features of this period for the European pedagogy was the subject of the International Conference *Educazione Nuova e Scuola Attiva in Europa all'alba del Novecento. Modelli, temi, figure*, carried out in Catania from the 25th to the 27th of March 2010 in the Department of the Educational Process of the University of Catania. The project, promoted by the research group led by Maria Tomarchio, turns towards a renewed engagement on this field of study in order to compare more intellectuals opinions coming from well-known European academic Institutes and roughs out some interpretations able to recompose the model framework, themes and figures of the New Education and of the Active School. Among the main purposes highlighted during the event, it is underlined the Italian involvement to the wide European movement linked to reiterative interpretative plans which limited innovation and the typical Italic declension. It is introduced, therefore, a new important element in comparison to the latest Italian studies about the theme examined in the historical field proposing hypostatized readings of the Italian essays restricted only to the activism or rebuilt according to the well-known French *Education Nouvelle*. The opinion deduced, above all from the post-war period, is that Italy was not involved in updating the field of education and did not took part with a substantial contribution, but rather has adopted and copied models developed abroad. Differently named around Europe as *Educazione Nuova*, *Éducation Nouvelle*, *Educación Nueva*, *Reformpädagogik*, this movement shows not only a flexible way of declension of the word, but also features and aims of rebuilding connected to a rough child-centring.

In this international study environment, the editorial enterprise of Maria Tomarchio and Gabriella D'Aprile has a great influence, as it collects the

Conference Acts in two monographic volumes of the review «I Problemi della Pedagogia».

The researchers work interweaves a un *fil rouge* which passes through all the contributions of the first section (*Educazione Nuova e Scuola Attiva in Europa all'alba del '900. Modelli e temi*, monographic number of «I Problemi della pedagogia», vol. LVI, nn. 4-6, July/December 2010) in comparison to the inspiring guidelines and to the theoretical leanings which characterized the pedagogical and educational-didactic transformation movement around Europe. The opening analysis of the essay of Maria Tomarchio restores the protean nature of this pedagogy season through the prism metaphor, which spreads only a light ray among its several spectral components. The critical reading is a deep overview, where the common denominator is found in the 'integral education' model, developed in a different way in comparison to the individual development both for social aspects of cooperation and for dialogue. Maria Tomarchio proposes to neglect the worn-out 'hypostatization' models developed around the limited and consumed activism, in favour of a point of view much more well-structured and full of shades able to capture forgotten experiences. The intellectual examine reading rules concerned, till today, to the Italian studies that from the post-war period, supported an inexplicable discrimination between the sources and a sort of *vice* codification. The scientific meaning of this kind of opening can be found on the foreign sources that bring back the Italian experiences inspired to the New Education. Among those *L'aube de l'école sereine en Italie. Monographies d'Education nouvelle*, volume conceived and developed by Adolphe Ferrière and published as a monographic number of the periodical «Pour l'Ere Nouvelle», never translated in Italian, as *Las escuelas nuevas italianas*, a review about the new Italian schools written by the Spanish educator and pedagogue Concepció Sainz-Amor (1897-1994) published in the same year as a monographic number edition of the «Revista de Pedagogia» of Lorenzo Luzuriaga, leading personality of the international pedagogic transformation.

The Spanish study overview presents a huge documentary research, almost unknown, about the Italian studies, a grey area in the Italian rebuilding that, however, highlights several educational vanguard experiences during the first decades of the XX century. Isabel Corts Giner writes an essay where publishes the work of cataloguing and rebuilding lead by the G.I.P.E.S. (Grupo de investigación: Recuperacion del patrimonio histórico-educativo sevillano)² about *La recepción de la pedagogía de la Escuela Nueva en España a través del Boletín de la Institución Libre de Enseñanza (1876-1936)* and about the role of the *Institución libre de Enseñanza* in the spread of the new pedagogic tendencies

² M^a I. Corts Giner et al., *Ciencia y Educación en el Boletín de la Institución Libre de Enseñanza: Catálogo de sus contenidos*, Sevilla, GIPES/Dpto. de Teoría e Historia de la Educación y Pedagogía Social de la Universidad de Sevilla, 2004.

in Spain and in the rest of Europe. The Spanish pedagogic experimentalism was subject of study of Joan Soler I Mata, *Europa en la renovación pedagógica de la escuela rural en Cataluña y España*, which highlights the main features of the rural school model in Spain and Catalonia. This presents some interesting suggestions about the educational experience of the work on a setting where political, social, economic and cultural aspects weave together. Thanks to this transformation overview in the educational field, the interest for the rural school seems to be at the centre of the study finding in the land cultivation the main relationship between nature and culture, as a place of experience learning/apprenticeship, and promotion of social integration requests.

The volume presents significant contribution that roughs out some guidelines for the New Education model. Among those, Gaetano Bonetta, through a huge number of reflections, considers the New Education as an historical and theoretical standard, thinking about the dialectic complementarities of the categories of the historical concern and the modernity and about the 'continuity' and the 'change' in education. The analysis of Franco Cambi finds in the New Education and in the European Active School a «movement of movement», where he finds some evolution profiles. In order to read in a better way the peculiarities of this «prism», he proposes to adopt an interpretative equipment archaeological-genealogical to fix some genetically aspects, the original structure of the movement that can be karstic for the knowledge construction, and the evolving aspects to understand the variety and their historical development.

On the German overview studies, Ignazio Volpicelli, in discontinuity with some reconstructions of manner of the work of Johann Friedrich Herbart, brings into question the supposed and incompatible distance between the consideration of the pedagogue consideration and of its followers regarding the Reformpädagogik. He shows the lack of meaning of the reasons which led the exponents of the German education vanguard to engage a «battle against Herbart» (as entitled in the exemplary article appeared in 1907 on the magazine *Die Deutsche Schule*). Volpicelli thinks that the essay of the Oldenburgish should be removed to the plans and stereotypes of the historiography established in order to catch all the renewal features with particular reference to the arising scientific pedagogy.

At the end of this first volume, two essays show the possible forecast of bringing up to date the argument in different ways: Giuseppe Spadafora offers a reinterpretation of the work of John Dewey around the school-laboratory of Chicago, through the strong relationship between the scientific research and the activist school; Stefano Salmeri shows some aspects of the educative relationship teacher/student as a freedom exercise, of relation and responsibility opening a window on the Hasidic Judaism of the Eastern Europe.

In this section it is supplied, the essay of Letterio Todaro which examines some possible conflicts between the Gentile Reform and the culture of the New School with a method micro-historical proposing to pass through the narrow

door of the activist school, through the “narrow passage” of the educational realities still alive. Some important examples of pedagogic experimentalism appear in Sicily. The school “Cesare Battisti” in Catania, is addressed to the didactic and innovation method in order to have a new education and modernization application of the social life. Another interesting local situation is represented by the unknown activity of the section of the National Female Union in Catania, indicated by Giuseppe Lombardo Radice as one of the best experiences of the «new schools».

The work of the intellectuals continues on the second volume (*Educazione Nuova e Scuola Attiva in Europa all'alba del '900. Figure ed esperienze*, monographic number of «I Problemi della pedagogia», vol. LVII, nn. 4-6, July/December 2011) which contains fourteen essays concerning figures and experiences of the characters operative for the ideas spread and educational renewal practices. One of the qualities of this work is to introduce a new overview, different, about the engagement of the educators and pedagogues already well known by the Italian public of the academics of Education Science, permitting to catch the aspects not already analysed by the Italian historiography, to avoid old interpretation *clichés*. The classical profiles of the most famous exponents of the New Education or Active School result very rich or almost invalidated. Among those Roger Cousinet, Célestin Freinet, Adolphe Ferrière and Giuseppe Lombardo Radice. Apart from this engagement in putting famous characters in order, the collection rediscovers some of them *oubliés*, the most dynamic promoters of the new educative practices, forgotten by the pedagogic studies not only in Italy, a «Corporation des silencieux»³ according to the speech of Elda Mazzoni.

The volume opens with an essay of Gabriella D'Aprile who brings forward some parts of the unpublished correspondence of Giuseppe Lombardo Radice and Adolphe Ferrière, found on the *Fonds Adolphe Ferrière* in the *Fondation Archives Institut J.J. Rousseau* of the Geneva University. In a restoration overview of the primary sources of the «virtuous and thought writing», the correspondence offers to the historical-educative research an important element to restore the relationship network between the Geneva institute and the Italian movement of the New Education.

The pedagogue coming from Catania is at the centre of different essays. The analysis led by Francesca Pulvirenti finds a deep connection and mutual references between language education and critical didactic in the work of Giuseppe Lombardo Radice. These aspects are considered functional for a full consideration of the reform pedagogic model in Europe and predisposed to

³ E. Mazzoni, *Les Ecoles Nouvelle set leur rôle dans la culture italienne*, in A. Ferrière (ed.), *L'aube de l'ècole sereine en Italie. Monographies d'éducation nouvelle*, Paris, Crémieu, 1927, p. 183.

an updating in the multicultural social question that makes a contemporary pedagogic reflection.

In the overview of Giuseppe Lombardo Radice able to give back to the complexity of his figure and the deep interconnections with the social, political and cultural context of that time, it is possible to situate the studies, which fix some micro-realities where he operates. Among those, recently, some works are concentrated on the editorial enterprise, which considers the pedagogue of Catania as the promoter of the educational debate in a way very far from the social and cultural questions⁴. In this direction the essay of Giuseppe Pillera gives back aspects showed by the editorial engagement conducted by Lombardo Radice towards the magazine «Rassegna di Pedagogia e di Politica Scolastica». This is presented as a declared extension of the «Nuovi doveri» and is edited by Sandron in Palermo for a short lapse of time, for two years (1912-1913). In spite of the publication so limited in time, this magazine presents interesting documentary sources around the most touched pressures of the Italian School. It is strongly felt the stress of reformation linked to the requirements for the feminine and popular spread in order to fight the illiteracy. During these years, Lombardo Radice managed these questions in his works of advisor and didactic consultant of the National Association for the Interests of the South of Italy, born in 1910⁵.

In southern Italy, the Sicilian background shows an educational renewal feeling proposed as a representative of the most known experiences of European

⁴ Cf. M. Colaci, *Gli anni della riforma. Giuseppe Lombardo Radice e "L'Educazione Nazionale"*, Lecce-Brescia, Pensa MultiMedia, 2000; A.R. Rossi, *Idealismo pedagogico e riforma della scuola nella rivista "Nuovi Doveri"*, Cosenza, Periferia, 2002.

⁵ The Association is founded by a group of young intellectuals after the earthquake in 1908 in Messina and Reggio Calabria. Among its main most important exponents there are the main intellectuals who represent the Italian *intelligenza* of the first years of the nineties: Leopoldo Franchetti, Giustino Fortunato, Gaetano Salvemini, Umberto Zanotti Bianco apart from the educators and masters such as David Levi Morenos and Giovanni Cena, and above all Giuseppe Lombardo Radice who, from the date of its foundation, is the councilor member and didactic supervisor. The Association had a primary role for the spread of education and instruction in the South of Italy with the foundation and the support of popular libraries and nursery schools of Montessori's inspiration in the areas of Calabria shocked by the earthquake. It is however from 1921 that the scholar work starts in order to fight the illiteracy through the *Opera contro l'analfabetismo* which commits to the Association the management of the evening school in Calabria, Basilicata, Sicilia and Sardegna. This Association keeps the mandate for seven years, during which it introduces some interesting innovations such as the obligation for the teacher be resident near the school in order to ensure the didactic continuità, the adoption of the Montescala calendar for the valorization of the graphic activity and the natural observation, in addition to a strong attention to the land element and in the definition of the scholar programs. Cf. Associazione Nazionale per gli interessi del Mezzogiorno d'Italia, *Il nostro lavoro nel Mezzogiorno*, Catania, Cav, S. Di Mattei & C., 1922; Associazione Nazionale per gli Interessi del Mezzogiorno d'Italia, *Le nostre scuole: l'opera contro l'analfabetismo in Basilicata, Calabria, Sardegna e Sicilia. 1923-1924*, Roma, Associazione Nazionale per gli Interessi del Mezzogiorno d'Italia, 1926; Associazione Nazionale per gli interessi del Mezzogiorno d'Italia nei suoi primi cinquant'anni di vita, Roma, Collezione meridionale editrice, 1960.

vanguard. Its main exponents are moved by requests of reforms that are in line with the continuity model of the New Education and Active School, but at the same time they give importance to the social and cultural feature of the area. Some of the inspiring reasons are the celebration, spontaneity and childhood freedom, the education of the mankind, the complete idea of education, the importance of the natural method of learning, the relationship between education and work. Among the exponents of this educational transformation and of the didactic experimentation there is the educator and pedagogue Michele Crimi (1879-1963) who will be the forerunner of many enterprises in Trapani giving particular attention to his reference environment⁶. The Sicilian fervour of educational vanguard is confirmed by the birth of the three-monthly magazine «La Nuova Era», founded in Palermo in January the 1926, as the French magazine «Pour l'Ere nouvelle», The German «Das werdende Zeitalter», the English «The new Era». Ferrière writes that «another good news concerning our Italian friends Gaetano Arcara of the “Reale Istituto Tecnico F. Parlatore” of Palermo announced the birth of the Rivista internazionale di Nuova Educazione “La Nuova Era”»⁷.

One of the protagonists of the reformation progress in Sicily is Emanuele Latino de Natali, expert of the educational reality of Sicily and promoter of requests of masterful professionalization and didactic transformation, is introduced by Marisa Marino. Latino was not only known as an academic of Sicilian cultural environment but also appreciated by the Instruction Ministers thanks to a short scientific production spread. Professor of anthropology and pedagogy at the University of Palermo, Latino founded in 1879 the *Museo Pedagogico di Palermo*, one of the first in Italy, where interesting enterprises were directed having as main features the hygiene and innovation for the school building and furniture. The magazines «Archivio di Pedagogia e scienze affini» and the «Conferenze pedagogiche» led by Latino speak about some important events. He works on the Sicilian context where Marisa Marino proposes an interesting reading finding some reasons which forward the activism. A cultural unrest, where in the «local micro-history» is possible to find some of the transformation guidelines of the most cultural international movement.

In a rediscovery overview of the Italian influence with the so called minor figures, the essay of Viviana La Rosa highlights the outline of the master of Milano Maurilio Salvoni (1879-1933), one of the forgotten of the Active

⁶ An educational model which link school, extra-school and land is the inspirer of the enterprises proposed by Michel Crimi, as the *Educatório-ricreatório Garibaldi*, the *Pro-Infantia*, the popular course and the supplementary course, the garden classes, the summer-camp. In order to deepen the figure of Michele Crimi cfr M. Tomarchio, G. D'Aprile, *Michele Crimi, pagine inedite di pedagogia siciliana*, Acireale-Roma, Bonanno, 2007; M. Tomarchio (ed.), *Lo sperimentalismo pedagogico in Sicilia e Michele Crimi*, Roma, Anicia, 2008; G. D'Aprile, *Adolphe Ferrière e les oubliés della scuola attiva in Italia*, Pisa, ETS, 2010.

⁷ Cf. A. Ferrière, *Livres et revues*, «Pour l'Ere nouvelle», vol. 1, January 1926, p. 16.

School, and his innovative experience educative/didactic, thanks which Pierre Bovet will forge the expression *école active*. As remembered in the document of Viviana La Rosa, Salvoni is the promoter of *lezioni unitarie* at the *School of Education of the spontaneous activity* of Gazzada (Varese). He collects a report of this activity, from 1909 to 1916, in the volume *Una macchia sul muro e altre lezioni*⁸. After one year of the exit of this work of Salvoni, *L'intermédiaire des Educateurs*⁹ appears a review on the volume, not signed but probably written by Bovet, where for the first time appears the expression «*école active*», as indicated by Daniel Hameline¹⁰.

Salvoni is the main interpreter of the thought of John Dewey in Italy and for this reason very appreciated in the Italian and international environment. In spite of the success obtained by the master of Milan, witnessed by the choice of Ferrière and Claparède during the meeting in their trips in Italy, he suffers a work of a too heavy removal. Defined by Ferrière in the *L'école active* in 1922 «*vétéran de l'éducation nouvelle*», after five years Salvoni does not find any mention to the review *L'aube de l'école sereine en Italie. Monographies d'Education nouvelle*¹¹ of the Genevan although the draft corresponds with the visit of Ferrière at the Carducci Institute where Salvoni was the director. The work of recovery of Salvoni delivers to the Italian studies one of the forerunner of the Active School in Italy and denounces some of the most serious gaps of the recreation of this season of educational vanguard.

According to the most well-known exponents of the movement New Education, France offers some of the best names of didactic and education transformation. Roger Cousinet and Célestin Freinet are among the best known, nevertheless their work appears limited to some guidelines linked to a scholastic reflection environment. Freinet and his *didactic techniques*, Cousinet and the free work method for groups, are the most diffused summaries not only in Italy. In order to show these profiles, simplified because free from the most huge reflections gathered in the context dynamics, the collection offers to the intellectuals two interesting analysis of the studies of these pedagogues.

In an overview of a socially active research, in order to point out different interpretative keys, the essay of Dominique Ottavi, entitled *Roger Cousinet entre tradition et modernité*, proposes to find some of the theoretical model of free work for groups and to operate an analysis of the work in Paris. The French intellectual finds two big reasons in Roger Cousinet life and work strongly linked: the first and the less known phase of the experimental interests is strictly linked to the second season of his life which is, instead, the most diffused in the pedagogic contemporary literature. The vice repeated in literature in the

⁸ M. Salvoni, *Una macchia sul muro e altre lezioni*, Milano, Libreria Editrice Milanese, 1917.

⁹ Cf. Livres nouveaux, «L'intermédiaire des Educateurs», June-July 1917.

¹⁰ Cf. D. Hameline, A. Jornod, M. Belkaïd, *L'école active. Textes fondateurs*, Paris, Press Universitaires de France, 1995.

¹¹ Ferrière (ed.), *L'aube de l'école sereine en Italie. Monographies d'éducation nouvelle*, cit.

work of Cousinet is the lack of consideration of his young studies. In order to dismantle the logic order, Ottavi needs to use some reading lens for the 'second' Cousinet, mediated and determined by the guidelines of the study of the *first*.

He shares with Cousinet the destiny of having delivered his thought to the scholastic environment, eclipsing part of his cultural heredity to the French pedagogue Célestin Freinet. The essay of José Gonzàles Monteagudo brings some important ideas in direction to a reflection among the most spread reading records. He proposes an interesting analysis of the Freinet's work from the approach to the enterprise led by Adolphe Ferrière and of the *Ligue internationale pour l'éducation Nouvelle* (LIEN), till the progressive removal. The biography of Celestin Freinet shows his intellectual profile, as the critical successor of the *Education Nouvelle* from his ideological positions. The *focus* of the essay is above all round the improvement of a particular position from the French pedagogue according to the International vanguard movement of education inspired to the themes of social progressivism in which he is interested.

Around the figures well known of the movement of the New Education, the volume delivers to the attention of the academics also interpreters of the educational practices new and less known in Italy. Some interesting ideas are showed in the essays of Marinella Muscarà about Beatrice Ensor (1885-1974), scholastic supervisor English director of the propaganda of the New Education in the United Kingdom «The New Era» and of Maria Consolación Calderón España about *Las Reales Sociedades Economicas de Amigos del País y la educación*. They open a window to the Swedish essays of Anders Svensson about Ellen Key (1849-1926), writer of one of the best pedagogic texts of the nineties as *Il secolo del fanciullo* and of Ariana Mellquist on three of the writers who have mostly inspired the New Education in the Swedish Literature for childhood: Selma Lagerlöf, Tove Jansson and Astrid Lingred. Another important aspect is the educative vanguard in the Swedish literature, above all about some themes such as the valorisation of the natural dimension and the learning experience.

The two volumes collection of the conference Act debated in Catania is an editorial proposal which gives a detailed reconstruction of the educative transformation season of the first years of the nineties. The work delivers an outcome of study looking both to the analysis of interpretation of the inspiring guidelines to the theoretical approach, and to the research about the figures and experiences of educational and didactic figures. A well-structured context, enriched by a European influence of the contribution that ensured a prolific content outlook.

An important aspect of the work is the choice of the interpretation overview adopted removing the most obvious reading procedures, both for the models of the New Education and to the so-called *portraits* of the international Active School. Along the same idea of transformation of this complex period, we find interesting essays led in almost unpublished sources, giving to the research setting

some experiences of teachers and educators belonging to the *Corporation des silencieux*, as Elda Mazzoni defined them.

The collection offers them important research lines and asks to some questions for the adequacy of general characters, which from the after world war period, have denied an Italic declination of the education renewal movement. Through the recovery and international relationships, the work of the academics aims to appreciate the heterogeneous Italian movement, rich in shades, polymorphic for the requests and for the educational practices.

This important mass of unpublished material is reintroduced in the research domain. Many are, indeed, the theoretical analysis and the interpretation theories that can express in order to outline advanced overviews of research and give new impulse to some features still operating today, directly or indirectly, on the pedagogic contemporary cultural background.

Thanks to the prolific pedagogic transformation and the thoughts about the categories for the research aimed to analyse themes and models, the volume essays deliver to the Italian pedagogic studies what we can define phylogenetic roots of new the education requests; roots which do not follow coherent expansion and so, in reference to the Italian work, they reintroduce their essays in order to the research environment, opening many interpretative ways.

*Scientific News
and Activities
of Research Centres*



Cronache scientifiche
e Attività
degli istituti di ricerca

History of education and children's literature in the Italian universities (1988-2013). Anatomy of a university discipline between teaching, scientific research and cultural presence¹

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ABSTRACT: The contribution presents the main purposes and the scientific lines of a research aiming at deepening the characteristics and the perspectives acquired by the

¹ Paper presented at the ISCHE Pre-Workshop *Project Cartography* – University of London (UK), July 22nd 2014.

discipline of the *History of education/Storia dell'educazione* and, more generally, by the whole spectrum of the disciplines included in the scientific and disciplinary field M-PED/02 (Storia della Pedagogia) in the Italian university system. The research, which represents the Italian chapter of a more exhaustive investigation developed within the framework of the ISCHE (*International Standing Conference on the History of Education*) and under the European coordination of Alexandre Fontaine (Université de Genève), Rita Hofstetter (Université de Genève), Emmanuelle Picard (École Normale Supérieure de Lyon) and Solenn Huitric (École Normale Supérieure de Lyon), intends to focus on the time-span from 1988 to 2013 and to examine in depth the following topics: chairs and teaching courses, as well as doctoral courses of history of education (Storia dell'Educazione) and, more in general, the disciplines included in the scientific and disciplinary field M-PED/02 (Storia della Pedagogia) established and started in the Italian universities; research projects carried out at Italian and international level financed – in the above mentioned time span – respectively by the Italian Ministry of Education, University and Research and by the European Union; scientific and cultural initiatives (conferences, seminars and workshops at national and international level) organized by the different Italian universities on topics related to the disciplines belonging to the scientific and disciplinary field M-PED/02 (Storia della Pedagogia); scientific reviews and specialized editorial collections which are part of the same scientific and disciplinary field; Documentation and research centers specialized in the field of the history of education and of children's literature (departmental or between departments; inside one university or between some universities) and school and Didactics Museums established inside the Italian universities. Finally, the research intends to deepen the achievements and the initiatives carried out, in the period 1988-2013, by the Italian Center of the History of Education research/Centro Italiano per la Ricerca Storico-Educativa (CIRSE), a scientific society raised in the 1980 under the impulse of the historians of education and children's literature in Italy.

EET/TEE KEYWORDS: History of Education; History of Children's Literature; Mapping the discipline; Italy; 1988-2013.

The research group constituted inside the ISCHE (*International Standing Conference on the History of Education*) intends to realize a real map of the *History of Education* in Europe in the last 25 years (1988-2013), through the reconstruction, from a chronological point of view, of the characteristics and the perspectives acquired by this discipline in the university and research centers of the whole Europe in the above mentioned time span².

It is a scientific and cultural initiative of undeniable value and importance, especially because it will allow the scholars of different countries to lay the foundations for the starting of a better knowledge of the national research institutions and traditions and, at the same time, to build a real European network of the historical-educational research, capable, more than it happens nowadays, to include, enhance and integrate the communities of scholars and researchers of the field belonging to different European universities.

² See A. Fontaine, R. Hofstetter, S. Huitric, E. Picard, «*History of education*»: *Mapping the discipline / Cartographie de la discipline «Histoire de l'Éducation*», «*History of Education & Children's Literature*», vol. IX, n. 1, 2014, pp. 853-856.

Within the framework of this international group of work, a research unit was established at the University of Macerata with the aim of deepening the characteristics and the perspectives acquired by the History of education/*Storia dell'Educazione*, and more in general, by the whole spectrum of the disciplines included in the scientific and disciplinary field M-PED/02 (*Storia della Pedagogia*)³ in the Italian universities (1988-2013), providing a picture as organic and exhaustive as possible of this university discipline in Italy, with the purpose to highlight the didactic problems connected with the high education teaching as well as those connected with the scientific research and the cultural presence of this discipline in the Italian and international context.

In this perspective, the Research unit of Macerata has started a few months ago, thanks to the friendly and fertile collaboration of the colleagues of 46 Italian Universities directly engaged in the project⁴, a specific research aiming at arising and deepening the different scenarios that characterize the discipline in the Italian university system:

³ Between the University disciplines included in the scientific and disciplinary field M-PED/02 (*Storia della Pedagogia*) there are: History of Pedagogy, History of the school and of the educational institutions, History of Education, History of education and of the schools, Compared history of the educational institutions, Comparative education, Theory and History of Children's Literature, Children's Literature, History of Youth Literature, See the list of the Scientific and disciplinary fields (*Elenco dei settori scientifico-disciplinari*) and the *Declaratorie dei settori* attached to the Decreto Ministeriale 4 ottobre 2000 – *Settori scientifico-disciplinari*, «Gazzetta Ufficiale», 24 ottobre 2000, n. 249 – supplemento ordinario n. 175.

⁴ Between the colleagues who have contributed to the present research, providing news and information concerning the different Universities, we should mention, with a particular appreciation: Maurizio Piseri (University of Valle d'Aosta), Maria Cristina Morandini (University of Torino), Giuseppe Zago (University of Padua), Paolo Marangon (University of Trento), Annemarie Augschöll (Free University of Bolzano), Angelo Gaudio (University of Udine), Monica Ferrari (University of Pavia), Pino Boero (University of Genova), Giuseppe Bertagna and Evelina Scaglia (University of Bergamo), Simonetta Polenghi (Catholic University of Milan), Gabriella Seveso (State University of Milan and University of Milan «Bicocca»), Mario Gecchele (University of Verona), Cristiano Casalini (University of Parma), Fulvio De Giorgi (University of Modena and Reggio Emilia), Luciana Bellatalla (University of Ferrara), Emy Beseghi and Tiziana Pironi (University of Bologna), Carmen Betti and Stefano Oliviero (University of Firenze), Giuseppe Serafini (University of Siena – Campus Arezzo), Mario Tosti (University of Perugia), Angela Giallongo (University of Urbino), Furio Pesci (University «Sapienza» of Rome), Ignazio Volpicelli (University of Rome «Tor Vergata»), Carmela Covato (University of Roma Tre), Francesco Casella (Salesian Pontifical University in Rome), Rachele Lanfranchi (Pontifical Faculty of Education «Auxilium» of Rome), Marco Antonio D'Arcangeli and Luca Puglielli (University of L'Aquila), Ilaria Filograsso (University of Chieti-Pescara), Enrico Corbi and Fabrizio Manuel Sirignano (University of Napoli «Suor Orsola Benincasa»), Leonardo Acone (University of Salerno), Alberto Barausse (University of Molise), Michela D'Alessio (University of Basilicata), Giuseppe Trebisacce (University of Calabria), Antonella Cagnolati (University of Foggia), Luca Gallo (University of Bari), Hervè A. Cavallera (University of Salento), Salvatore Agrestra and Caterina Sindoni (University of Messina), Antonio Bellingreri (University of Palermo), Antonia Criscenti (University of Catania), Stefano Salmeri (University «Kore» of Enna), Marco Salis and Susanna Barsotti (University of Cagliari), Fabio Pruneri (University of Sassari).

1) Arrangement of an organic *map of the chairs and of the teaching courses* related to the multiplicity of the disciplines included in the scientific and disciplinary field M-PED/02 (Storia della Pedagogia) introduced in the Italian universities in the period related to the years 1988-2013. In this perspective, in order to build a specific *map*, the research unit intends to focus its attention, first of all, on the legislative and institutional reforms and reorganization of this scientific field, as well as on the ministerial politics about high education, University orders and the teachers recruitment for the different orders and levels of schools, which have characterized the last decades, and in particular the period starting from the end of the '80s until today. After having clarified the legislation and institutional framework to which we will refer, a particular attention will be given to verify the positioning of the chairs and of the courses of the different disciplines included in the scientific and disciplinary field M-PED/02 (Storia della Pedagogia) in relation to the existing degree courses and University Faculties. At the same time, we will try to outline the typology and the possible characteristics of the holders of the chairs and of the above mentioned courses for the period taken into consideration (1988-2013): Tenure/Staff professor/external professor with a contract; Full Professor/associated/researcher; professor specialized in the scientific disciplinary field/teacher specialized in similar or different scientific and disciplinary fields.

2) Census and description, with reference to the period included between 1988 and 2013, of the PhD. programs (*dottorato di ricerca*)⁵ specifically dedicated to the whole spectrum of the disciplines belonging to the scientific disciplinary field M-PED/02 (Storia della Pedagogia), or of those related to the pedagogical and educational sciences, and to the social and human sciences with specific *curricula* or *courses* (*curricula* or *indirizzi*) oriented to the history of pedagogy and education, or in a simpler way, those in which Doctoral dissertations devoted to historic-pedagogical or educational topics have been discussed. In the context of the in-depth analysis of this topic, we will try not only to highlight the specific ministerial legislation regulating the doctoral studies in Italy and the evolutions occurred with the passing of the time, but also to provide a precise map of these doctoral studies (administrative headquarters, eventually associated seats, directors, teaching staff involved, procedures of recruitment of doctoral students, programs of studies and other educational

⁵ See the most important legislation acts concerning recruitment procedures: Legge 3 luglio 1998, n. 210 – *Norme per il reclutamento dei ricercatori e dei professori universitari di ruolo*, «Gazzetta Ufficiale», 6 luglio 1998, n. 155; D.M. 30 aprile 1999, n. 224 – *Regolamento recante norme in materia di dottorato di ricerca*, «Gazzetta Ufficiale», 13 luglio 1999, n. 162; Legge 30 dicembre 2010, n. 240 – *Norme in materia di organizzazione delle università, di personale accademico e reclutamento, nonché delega al Governo per incentivare la qualità e l'efficienza del sistema universitario*, «Gazzetta Ufficiale», 14 gennaio 2011, n. 11; D.M. 8 febbraio 2013, n. 45 – *Regolamento recante modalità di accreditamento delle sedi e dei corsi di dottorato e criteri per la istituzione dei corsi di dottorato da parte degli enti accreditati*, «Gazzetta Ufficiale», 6 maggio 2013, n. 104.

and research activities provided by the program); lastly, an inventory of the doctoral thesis about topic strictly related to historic-pedagogical topics and presented in Italy from 1988 to 2013 will be realized.

3) Census and presentation of projects of national and international interest (*progetti di ricerca di respiro nazionale e internazionale*) devoted to topics with historic-pedagogical or educational character – in particular the Projects of National Interest (Progetti di Ricerca d'Interesse Nazionale, PRIN) the European Project – which, during the period 1988-2013, have been financed respectively by the Italian Ministry of University research (MIUR) and by the European Union. In this perspective, the present investigation intends not only to verify the role and the importance of the funds granted to the *research projects* in the historical-pedagogical and educational field, compared to those granted to other human and social sciences (philosophy, history, sociology, anthropology), but also to highlight the characteristics of the research groups at the origin of each project, the typology of the latter (aims, methodological approach, international references) and the effect which each of them had in the historiographical context and in the organization of the research field.

4) Census and presentation, with reference to the period included between 1988 and 2013, of the main and more relevant scientific and cultural initiatives – *conferences and seminars* of research with a national and international character – organized in the different Italian Universities about the topics related to the disciplines included in the scientific and disciplinary field M-PED/02 (Storia della Pedagogia). In this context, a particular attention will be devoted to the research meetings and to the initiatives which have promoted the pedagogical and historiographical renewal and the internationalization in the field of the historic-pedagogical and educational research.

5) Configuration of an atlas of the Italian specialized scientific reviews and editorial collections (*atlante delle riviste scientifiche e delle collane editoriali*) referring to the scientific and disciplinary field M-PED/02 (Storia della Pedagogia), with a particular reference to the period from 1988 to 2013. With particular reference to the scientific reviews, our purpose is to give a specific attention not only to those strictly historic-pedagogical – as in the case, for example, of the «Bollettino del Centro Italiano per la Ricerca Storico-Educativa (CIRSE)» (Parma, then Florence), of the «Studi di Storia dell'Educazione» (Rome) by Fabrizio Ravaglioli, of the «Annali di Storia dell'Educazione e delle Istituzioni Scolastiche» (Brescia) by Luciano Pazzaglia and of «History of Education & Children's Literature» (Macerata) by Roberto Sani –, but also of those dedicated more in general to the different branches of the research of the pedagogical and educational sciences, which have devoted a significant space to contributions of historical character, such as the «Rassegna di Pedagogia» (Padua), «Riforma della Scuola» (Rome), «Scuola e Città» (Florence), «Ricerche Pedagogiche» (Parma), «Pedagogia e Vita» (Brescia), «Orientamenti Pedagogici» (Rome), «I problemi della Pedagogia» (Rome), «Studi sulla Formazione» (Florence) e

«*Studium Educationis*» (Padua)⁶. Similarly, for what concerns the specialized editorial collections, we'll refer not only to those exclusively devoted to the historical essays, such as in the case, just to make some examples, of «*Social History of Education*» (*Storia sociale dell'Educazione*) by the publisher Unicopli of Milan, of «*Paedagogica. Historical texts and studies*» (*Paedagogica. Testi e studi storici*) by the Publisher La Scuola in Brescia, of «*History of Education. School and educational institutions*» (*Storia dell'Educazione. Scuola e istituzioni formative*) and of «*Paideia*» by the Publisher Pensa MultiMedia in Lecce, of the so-called «*Library of History of Education & Children's literature*» (*Biblioteca di History of Education & Children's literature*) by the Publisher of the University of Macerata (eum), of «*Nerbiniana. History of the periodical press for children and youth*» (*Nerbiniana. Storia della stampa periodica per l'infanzia e la gioventù*) by the Publisher Nerbini in Florence; but also to those in the more general field of the educational sciences, which have devoted an adequate and significant space to the historical research. Some examples for this case: «*Old and modern educators*» (*Educatori Antichi e Moderni*) by La Nuova Italia in Florence, «*Educational Sciences*» (*Scienze dell'Educazione*) by the Publishers ETS in Pisa, «*Gender, difference, education*» (*Genere Differenza Educazione*) by Guerini e Associati in Milan, «*Heuresis. Educational sciences*» (*Heuresis. Scienze dell'educazione*) by CLUEB in Bologna and «*Theory and History of Education*» (*Teoria e Storia dell'Educazione*) by the Società editrice Internazionale (SEI) in Turin. To these, naturally, we should necessarily add the different specialized collections promoted, since several years, by the Publisher Franco Angeli in Milan.

6) Census and presentation, with a reference to the activities and the initiatives promoted in the period included between e 1988 and 2013, by the main Documentation research centers (*Centri di documentazione e ricerca*) specialized in the field of the history of education and of children's literature (departmental and interdepartmental, of one university or between universities)⁷; and of the school Museums (of the education and Didactics) (*Musei della*

⁶ For a more systematic and updated picture of the scientific reviews of the field, owe can refer to the (forthcoming) proceedings of a recent National Seminar of the Italian Society for Pedagogy/ Seminario nazionale della Società Italiana di Pedagogia (SIPED) about the theme *Pedagogical Reviews and the quality of research / Riviste pedagogiche e qualità della ricerca*, hold in Rome in March 27-28 2014.

⁷ Just as an example, we can mention: the «Center of Documentation and research on the history of school textbooks and children's literature» (Centro di documentazione e ricerca sulla storia del libro scolastico e della letteratura per l'infanzia), created in 2004 at the University of Macerata; The «Center of Documentation and research on the history of educational institution, of the school textbook and of Children's literature (Centro di documentazione e ricerca sulla storia delle istituzioni scolastiche, del libro scolastico e della letteratura per l'infanzia), instituted in 2006 at the University of Molise; and recently, the «Center of Research in Children's Literature in Italy» (Centro di Ricerca in Letteratura per l'infanzia in Italia), instituted in 2013 at the University of Bologna.

scuola o dell'Educazione o della Didattica ecc.)⁸ founded inside the Italian universities. A particular attention, from this point of view, will be devoted to the role played by those university centers high specialized in the organization and in the enhancing of research, as well as on the internationalization of the studies of the field. Similarly, referring to the Museums, a particular attention will be devoted to the role played by them both from the point of view of the cultural entertainment and of the popularization of the historic-educational and school knowledge, and from the point of view of the professional training and education of the teachers of the schools of all levels and orders (through stages, workshops and seminars ecc.).

7) The last, but not less important, chapter of the research aimed at underlining and deepening the multiple dimensions and the different scenarios that, in the Italian university context, characterized the whole disciplines concerning the scientific disciplinary field M-PED/02 (Storia della Pedagogia), is that devoted to highlight the activity played since its origins (1980) and more in particular in the period from 1988 to 2013, by the Scientific society of our field that is the Italian Center of the Historic-pedagogical research (*Centro Italiano per la Ricerca Storico-Educativa*, CIRSE)⁹, of which we intend to reconstruct the genesis, the projects and the initiatives developed for the enhancing of the historic-educational research in our country, the productive and intense activity of workshops and Conferences, the recent initiatives aimed at the internationalization of our investigation field.

The research, that has just been started, should be concluded within three years with the publication of a monograph, written by four authors, in Italian and in English, aimed at the spreading of its results between the scholars.

⁸ About the School Museum of Education and didactics instituted in the Italian universities and on their activity during the last decade, we can refer to: J. Meda, *Musei della scuola e dell'educazione. Ipotesi progettuale per una sistematizzazione delle iniziative di raccolta, conservazione e valorizzazione dei beni culturali delle scuole*, «History of Education & Children's Literature», vol. V, n. 2, 2010, pp. 489-501.

⁹ We can notice the lack of an organic and documented reconstruction of the origins and of the activity carried out by the CIRSE in the last thirties years. See some brief information presented by G. Trebisacce, *La ricerca storico-educativa oggi tra acquisizioni consolidate e prospettive di sviluppo*, in H.A. Cavallera (ed.), *La ricerca storico-educativa oggi. Un confronto di metodi, modelli e programmi di ricerca*, 2 vols., Lecce-Brescia, Pensa MultiMedia, 2013, Vol. I, pp. 1-11.

Freinet Pedagogy in Romania

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ABSTRACT: This paper intends to highlight the need for complementary education. Freinet pedagogy represents a successful alternative in transversal competences formation of today's students from all over the world. In Romania, as we try to emphasize in this article, it is considered as a promoter of self-regulated learning, one of the most important competence for adapting today's world challenges. This pedagogy is student orientated and the teacher is a facilitator for guiding the students when they need it or ask for help. The objectives of the Freinet Association provide an introduction and ongoing training as well as the development of cooperation between academic staff and international movement teachers interested in the renewal and modernization of education.

EET/TEE KEYWORDS: Célestin Freinet; Teaching Practice; Primary school; School System; Romania; XX-XXI Centuries.

Introduction

Freinet pedagogy is «a modern school that prepares today's children and teenagers to act in the world of tomorrow»¹. This pedagogy follows the national curriculum in Romania and it is practiced in the states alternative education. In our country the method is applied in preschool and primary schools (groups and classes integrated into state schools established in the alternative educational network). In lower and upper secondary level are applied some of the Freinet techniques. It is also often used in non-formal education in the country in organizations named Palace of Children and extra-curricular activities, national and international camp *Freinet Holiday School*.

Principles and techniques of the alternative education presented, constitutes a universal approach specific to the education of today. Practiced for more than 80 years, this pedagogy demonstrates nowadays its deep topical. Pedagogical alternatives open a wide social reform. The real change is the one that affects the entire system, for the next period and for the future.

Democracy always needs educational alternatives confirmed in time at a social scale. Freinet pedagogy is a modern school that prepares children and adolescents of today to solve specific problems of the contemporary world. It is an educational alternative opened outwards. The child does not live only in school, the pedagogical view of his family, cultural and social environment is allowing him to speak freely and make proposals.

Freinet pedagogy is validated by research in educational science of the present addressing topical issues such as: the globality of the student customized cognitive strategies, the multitude of stimulating situations, creating a safe environment.

Avoiding failure is a constant concern of Freinet pedagogy by suppressing threats, punishments, humiliation, and classifications through an education that will lead to success. To reach success, the student should be helped and encouraged by organizing around his work and life, around his own possibilities, even the most modest ones. Freinet created a pluralistic pedagogy, pedagogy of success, which is trying different formulas for students to reveal and fulfil their potential. Thus at any time, each student can take the lead of the platoon. Consistent with the idea of linking school with society, life, Freinet does not self-proclaim a follower of the liberal individualism and unfettered liberty, saying: «We are, therefore, the proponents of school subjects and teacher authority, without which there could be no training, no education»². For Freinet «true

¹ About Freinet Pedagogy see website: <http://www.cnae.ro/documents/prezentare_freinet.pdf> (last access: December 2nd, 2013).

² C. Cociuba *et al.* (edd.), *Un deceniu de Pedagogie Freinet în România*, Timișoara, Asociați Română pentru o Școală Modernă, 2003, p. 39.

discipline [...] is the natural consequence of a good organization, cooperative work and moral climate of the classroom»³.

Freedom, in his view, makes sense when it means not the possibility to do nothing nor to do anything, but the possibility to choose for various activities. The child theorized by Freinet belongs in a group, social class and a cultural community. These memberships, from the point of view of the author, are important and give a higher social belonging. Through its intimate structure, Freinet pedagogy protects child's rights and international cooperation practice and aspires to a society of justice, brotherhood, freedom and peace.

Freinet pedagogy is not confined to propose new teaching methods to educators, but also promotes a process of global unity and uniqueness. It proves that a renewal of the educational report strengthens if the techniques modify as well as organizational tools, attitude of the teacher and teaching ability.

1. *Fundamental Guidelines of Freinet's educational practices*

We list the most important fundamental principles and guidelines that this pedagogy promotes:

1. *The rights and needs of children and adolescents* (respect for a person, the need for knowledge, the right to criticize);

2. *Respect for personal identity and diversity*: the child shall not be subjected to predetermined patterns, but accepted as such, with his personality. The problem is not reinserting deviant individuals into standardized categories, but to recognise their identity without exiling them for their differences, or have quit.

3. *The need for free speech and communication*:

- everyone has the right to express themselves;
- everybody must have the means to create;
- everyone should have the right to communicate freely within its group or with members of other groups (e.g., by sharing educational journals);
- techniques of expression should not be imposed in advance;
- free expression involves listening to others and respect for them;
- free expression is valuable both through its creative approaches and through its productions.

4. *An education through success*: only the success reinforces personal dynamism. Every child is capable of success. It is essential not to push the child to failure by excessive or premature demands. It does not require an education of facility, but a dynamic through accomplishments that will lead to others.

³ M.Șt. Rădulescu, *Pedagogia Freinet-un demers inovator*, Iasi, Ed. Polirom, 1999.

5. *A labour education*: education must find its essential engine in work, a creative work, freely chosen and assumed. In conquest of autonomy, each must learn to set goals instead of waiting to be always imposed from outside. School becomes a place of production, decided jointly by children through creation, research, skills acquired. Thus, it becomes a real preparation for the world of work in which everyone will be able to participate in decisions.

6. *Creative Responsibility*: Freinet pedagogy is based on cooperation between the adult and the child. They always assume greater responsibilities, preparing for their lives as citizens.

7. *Cooperative organization of the class/school*: class/ school is an important social environment and a first production site. The group has a positive connotation in the potentiation of individuals, respecting the collective life and individual needs.

8. *Another way of acquiring knowledge, and recognizing the child*:

- the right to pleasure;
- the right to experimentation.

It is denied any authoritarian approach and it monitors compliance, in all its diversity, the experimental trials of each child. It is the only mean to teach human beings how to be able to invent, instead of confining to reproduce.

9. *Critical analysis of reality*: refers to the following rights:

- experimenting;
- making assumptions;
- committing errors;
- getting dirty;
- interviewing the past;
- inquire about socio-economic entourage.

Experimental exploration is part of the global progress of becoming for each child.

10. *Another conception of programs and controls*: it is recommended that programs meet the needs of children. Self-correction, positive self-criticism of the group is fundamental in control.

11. *Other techniques and other pedagogical tools*: multiple techniques in Freinet pedagogy introduce various schemes of relationships in the classroom, but also outside of it. These relationships do not always pass through the teacher. The variety of work techniques creates the richness and quality of the educational environment relations that are established. Some of the Freinet techniques applied today in Romania are: School Journal, Free text, School correspondence, Documentary investigation, Plastic Expression, Body Expression, Manual creativity, Dramatic expression, Academic outing.

The best tools are those that allow great flexibility in use and meet the child's experimental exploration. The instruments are specific to individual work and collective excitement. They refer to the documentation, incitement, creation and production, learning and consolidation assessment.

2. Freinet pedagogy in Romania

Romanian Association for Modern School C. Freinet Timisoara, nongovernmental national professional association – A.R.S.M. C. Freinet – with legal personality from 1993 is promoting an alternative educational activity Freinet. Members are educators, teachers, secondary school, college and university teachers from all round the country.

The Association was formed by a group of teachers of French in Timisoara, which participated in a job training organized by the School Inspectorate Timis, the Ministry of Education in collaboration with I.Ch.E.M. France in August 1991. There followed a probation in France and one in Romania at Caransebes, 1992. Increasingly, it emerged the need for an association that brought together teachers who wanted a change in education. It was completed in 1993 by the establishment of the Romanian Association for Modern School in Timisoara. The following internship organized in partnership with the Association of Teachers from Timis in 1996, the membership has diversified through the joining of primary school teachers who began to apply at the classroom Freinet techniques. The years that followed were years in which the association aims were to promote Freinet pedagogy by organizing internships in collaboration with Teaching Staff from Timis, Arad, Mures, Brasov, Bacau, Buzau, Suceava etc. Following these activities among the association members numbered educators, teachers in the counties mentioned, and the association acquired a national character.

ARSM is represented in the National Commission for Educational Alternatives to M.E.N. from the date of its foundation (in 1999), along with representatives of educational alternatives practiced in Romania: Montessori, Jena Plan, Step by Step, Waldorf, and Curative Pedagogy.

The objectives of the Association targets the promotion of Freinet pedagogy through specific activities, providing introduction and on-going training in Freinet pedagogy as well as the development of cooperation between academic staff and international movement teachers interested in the renewal and modernization of education. ARSM C. Freinet is a full member of the International Federation of Modern School Movement (F.I.M.E.M.) federation that brings together all national movements throughout the world, which promote Freinet pedagogy⁴.

Among the associations activities we can include the development and organization of initiation and on-going training stages in Freinet pedagogy; Training teachers in to forming Freinet groups/classes; Organizes seminars, conferences, camps/holiday schools. Among associations activities there are: International Seminar *School otherwise* (1999); National Symposium *School otherwise* (2000); *Freinet Holiday School* national/international camp 1996-

⁴ M. Bâdea (ed.), *20 de ani de Pedagogie Freinet in Romania*, Timișoara, ARSMF, 2013.

2014; Internships organized in collaboration with training institutes in Timis and from the country contributed to attracting new members especially educator and teachers.

Increasingly took shape the desire in constituting Freinet classes. Thus were born the draft training in Freinet classes in France, projects funded by ICEM⁵ France and the French Cultural Services of the French Embassy in Bucharest. These stages were followed by internships in Romania conducted with the contribution of French trainers. The national Project «Freinet Universe» included in the Calendar of Activities National MECTS C. Freinet initiated by A.R.S.M. in partnership with the Children's Palace Timisoara and Children's Palace Buzau – 4 editions (2010, 2011, 2012, and 2013). Groups participating in this project are Freinet groups and classes, secondary and high school students. The project proved to be sustainable and is currently working for his submission. The association has developed successful partnerships with the Cooperative Institute of Modern School (ICEM), France; C.C.D. from Timis, Arad, Bacau, Bihor, Buzau, Brasov, Mures, Iasi, Suceava; French Cultural Institute in Timisoara.

3. *School network*

Numerous internships, held in country, led to a good advertising of Freinet pedagogy and to the desire to establish groups/classes in this alternative education given that it have been created the legislative framework – the National Commission for alternative educational setting 1999 and the Regulation on organization and operation of public alternative education and particularly in Romania. Freinet groups/classes are integrated into state schools and meets national curriculum.

Preschool level. Leading the way in pre-schools in Arad were teachers from kindergarten PN no. 2 Ineu. Introducing techniques has been made since the school year of 2001-2002. In this town, the group includes three Freinet promotions – 2005, 2007 and 2011 and continuing today. The 2006-2007 school years brings in Freinet network, 2 groups: Kindergarten PP no. 12 Timisoara – Kindergarten PN Sag, Timis County. Kindergarten with extended program Nr. 14, Timisoara Timis CSI's has made an agreement with the school year of 2010-2011. In 2012-2013 school years, in the big kindergarten Freinet Group 32 children were enrolled.

Primary School. The first Freinet class was formed in 2000-2001. Upon returning from Rennes, internship in a Freinet school is considered the first

⁵ About the ICEM see the website: <<http://www.icem-freinet.info/>> (last access: November 20th, 2013).

Freinet class at National Gymnasium «Alexander Ceusianu» Reghin, Mures County, with a staff of 25 students. In 2001-2002 there were also funded two classes and a class at the Hungarian section. In the 2010-2011 school years the 4th grade Freinet class in the same unit was formed. All classes conducted weekly joint workshops: Survey documentary, cooperative games, Creativity, Expression dramatic (Moldovan animation – school librarian), academic journal. All these years Freinet classes corresponded with schools from France and from Romania. From 2010 were laid the foundations for Celestin Freinet Summer School for children in the area, followed by editions in 2011, 2012 and 2013.

In 2001-2002, after a French-Romanian internship, it is established a Freinet team in Timisoara which starts with 5 classes in different schools. The school with I-VIII classes no. 21 «Vincent Babes» - 2 classes, school classes I-VIII No. 6, classes I-VIII School No. 7 «St. Maria» School with classes I-VIII Sag, Timis County. The five teachers were formed into a team that met weekly enthusiastically. There were made self-corrective sheets and, introduced into classroom practice, gradually, all Freinet techniques. Cooperation between teachers is an essential asset in practicing this pedagogy. Team increased in 2008-2009 with another member of school with classes I-VIII no. 24 in Timisoara.

Freinet network school classes and groups experienced in 2001-2002 a considerable increase (one group and 7 kindergarten classes at primary level), due to internships in France, French-Romanian internships organized in collaboration with the CCD Arad and Timis and the involvement of outstanding teachers. It turned out that teacher's teamwork is essential. Freinet holiday school was established in a work place and life environment for student's that participated and teachers. The workshop was an opportunity for adults to permanent and interesting exchanges classroom practices.

Trainers' contribution is appreciated within ICEM in 2002, 2003, 2004, Freinet pedagogy practitioners who have led workshops, and Text, Cooperative Living, Creating math etc. In the school year of 2007-2008 there were 9 classes in primary schools and three kindergartens groups. Currently there is an increase in the number of classes and groups.

Following internships, ARSM organized in collaboration with CCD Bacau new classes. The educational alternative Freinet is present in classes I-VIII School «Mihai Dragan» Bacau in 2004-2005 with one class, in 2005-2006 (2 classes), in 2006 to 2007 (3 classes), in 2007-2008 (4 classes), in 2008-2009 (4 classes), in 2009-2010 (4 classes), in 2010-2011 (3 classes), and in 2011-2012 (2 classes). In 2012-2013 there is only one class.

In school year of 2010-2011, the School with classes I-VIII no. 11, the first Freinet class appears in Oradea at a Hungarian section. In this school year Freinet pedagogy has gained ground with two first classes (one department in Hungarian and one department in Romanian) and fifth grade will result from ARSM internships organized in collaboration with CCD Bihor. Currently, this

unit operates at primary school: a preparatory class, class I, II, III and IV of the Romanian section and a preparatory class, class I, II, the III and IV of the Hungarian section. Secondary level: one grade, VI and VII of the Romanian section and one class V, VI and VII of the Hungarian section. Freinet classes, groups and their teachers are in constant communication and collaboration relationship by practicing school correspondence, exchanging journals and activities organized in partnership.

The National Project «Freinet Universe»⁶ included in the Calendar of Activities National MECS initiated by ARSM C. Freinet in partnership with Children's Palace Buzau and Children's Palace Timisoara, started in 2010 and resumed in 2011. It brings together Freinet groups and classes and secondary school students. The project is conducted throughout the school year; students present their productions in the Electronic Journal. The final evaluation of the 4 editions was performed at Freinet holiday school. The project proved to be sustainable and is still continuing in this school year according to the calendar of activities agreed.

Children and students from this alternative adapted easily to transition into the new cycle of education and demonstrated independent intellectual work habits, initiative, self-evaluation and evaluation capacity, autonomy and accountability. Noted in these children's progress is the development of communicational competence, readiness for teamwork, cooperation and mutual assistance.

Freinet pedagogy allows the child, himself to discover a large part of what they learn. Freinet pedagogy develops creativity and self-confidence. If traditional education borrows many Freinet pedagogical practices, such as displaying or creating class magazine, sadly they overlook the spirit of this practice, leaving aside what is more innovative and efficient in the Freinet pedagogy: free text, natural method reading and writing, correspondence, experimental exploration.

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⁶ D. Voicu, *Proiectul național «Freinet Universe» – mijloc de stimulare a creativității și de favorizare a comportamentelor pozitive*, in Bânda (ed.), *20 de ani de Pedagogie Freinet in Romania*, cit., pp. 35-41.

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L'Italia nella mente e nel cuore della pedagogia spagnola, iberoamericana e africana. I risultati di un convegno (Università di Salamanca, 4-6 giugno 2014)

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Italy in the heart and mind of Spanish, Latin American and African education. Conference findings (University of Salamanca, 4-6th June 2014)

ABSTRACT: In recent years, the Faculty of Education in the University of Salamanca (Department of Education History and Theory) has become the driving force behind a remarkable quantity of cultural events and initiatives. These include «pedagogical conferences» held with a view to analysing the numerous traces left among the rich heritage that the European nations have bequeathed to the Spanish and Latin-American education systems over the last hundred years. Held every one or two years, each of these conferences provides a forum for wide-reaching, in-depth discussion between scholars and university lecturers, and is accompanied by the publication of a large volume of the proceedings, edited by Professor J.M. Hernández Díaz. Of late, a particular focus of these proceedings has been the European influences on higher education, and the many repercussions of EC rulings, in accordance with the Bologna Process. Research interests have consequently shifted to the various European nations and their relations with the Spanish-speaking world, whether harmonious or characterized by criticism and debate, first France in 2008, then Germany in 2009, Great Britain in 2011, and, most recently, Italy in 2014. The aim of this paper is to sum up the recent conference on the Italian influences, to elucidate not only how and to what extent the pedagogical theories developed in Italy have altered the methodology and praxis of teaching in Spain, Latin-America and Africa, but also which concepts and authors have been better received than others.

EET/TEE KEYWORDS: History of Education; Pedagogical Theory; Europe; XX Century.

1. *Un centro di studi dall'apertura internazionale*

A partire dall'anno 2006 la Facoltà di Educazione dell'Università di Salamanca ha costruito un gruppo di lavoro dalle notevoli potenzialità nell'ambito della ricerca in campo storico educativo: si tratta di un G.I.R., acronimo che, nel criptico linguaggio burocratico accademico, significa «grupo de investigación reconocido», una cellula composta da undici componenti, giovani ricercatori che provengono da differenti università (sei della Università di Salamanca, tre della Università Pontificia di Salamanca, uno della Università di Valladolid e uno della Università delle Isole Baleari). La finalità fondamentale del gruppo che ha assunto la denominazione di *Helmantica Paideia*¹ consiste nell'elaborazione di eventi legati alla storia dell'educazione con un'ottica assolutamente internazionale, tenendo presente che l'Università di Salamanca, non soltanto in virtù della sua riconosciuta fama scientifica bensì per una scelta intenzionale di coloro che la governano, si pone come avamposto per la formazione delle élites dell'America Latina, accogliendo come studenti e dottorandi le giovani promesse del continente sudamericano.

Anima e mente di questo gruppo è il professor José María Hernández Díaz che con passione e abnegazione si dedica alla ricerca, alla crescita scientifica dei suoi allievi, alla diffusione della storia dell'educazione intesa nella sua accezione più ampia². Si tratta di un lavoro meritevole che fa della Facoltà di Educazione (e nello specifico del Dipartimento di Teoria e storia dell'educazione) il centro propulsore di una notevole quantità di iniziative ed eventi culturali quali, fra i molti altri, le «conversazioni pedagogiche» che sono basate sulla volontà di analizzare le numerose tracce che le varie nazioni europee hanno lasciato come prolifica eredità nella pedagogia spagnola e iberoamericana. Svolgendosi con cadenza annuale o biennale, ogni singolo convegno permette un vasto e proficuo confronto tra gli studiosi e i docenti universitari e viene accompagnato dalla pubblicazione simultanea dei ponderosi volumi degli atti³, tutti curati dal professor Hernández Díaz.

¹ Notizie dettagliate sulle attività alla pagina <http://www.helmanticapaideia.com/wp/?page_id=39> (ultimo accesso: 30 settembre, 2014).

² Per la qualità e la quantità della produzione scientifica del G.I.R. si possono consultare i titoli fino ad oggi pubblicati (<http://www.helmanticapaideia.com/wp/?page_id=15>; ultimo accesso: 30 settembre, 2014), e le tesi dottorali discusse (<http://www.helmanticapaideia.com/wp/?page_id=21>; ultimo accesso: 30 settembre, 2014).

³ *Cien años de Pedagogía en España*, Valladolid, Ed. Castilla, 2010; *De la Junta para la Ampliación de Estudios a la construcción del Espacio Europeo de Educación Superior*, Salamanca, Globalia, Ediciones Anthemia, 2009; *Influencias francesas en la educación española e iberoamericana (1808-2008)*, Salamanca, Globalia, Ediciones Anthemia, 2008; *Influencias alemanas en la educación española e iberoamericana (1809-2009)*, Salamanca, Globalia, Ediciones Anthemia, 2009; *Influencias inglesas en la educación española e iberoamericana (1810-2010)*, Salamanca, Hergar Ediciones Antema, 2011; *Influencias italianas en la educación española e iberoamericana*, Salamanca, FahrenHouse, 2014.

In anni recenti sono state studiate le idee pedagogiche dell'ultimo secolo in Spagna⁴, le influenze europee e le ricadute delle decisioni prese nella Comunità europea sullo spazio della formazione superiore, in sintonia con il processo di Bologna, sempre tenendo presente l'arco cronologico di un intero secolo⁵; a seguire, la focalizzazione della ricerca si è spostata sulle varie nazioni europee e sui loro rapporti, vuoi di attrazione, vuoi di rifiuto e critica, con il mondo iberico: dapprima la Francia⁶ nel 2008, poi la Germania⁷ nel 2009, la Gran Bretagna⁸ nel 2011, ed infine l'Italia nel 2014⁹.

2. La struttura del convegno

Il convegno sull'influenza italiana si è svolto nei giorni 5-6-7 giugno 2014, strutturato in un programma molto denso ed interessante che ha visto la partecipazione di sessanta colleghi provenienti dalla Spagna, dal Portogallo, dall'America del Sud e dall'Africa. Nella prima giornata, dopo la conferenza inaugurale pronunciata dal professor Conrado Vilanou Torrano (Università di Barcellona) dal titolo *La pedagogia católica italiana y su influencia en España*, nella quale sono state messe in evidenza le opere e le teorie di alcuni grandi pensatori italiani nonché la loro diffusione in terra iberica, altre due relazioni ufficiali si sono poste la finalità di indagare temi di notevole impatto storico-educativo come l'Umanesimo, analizzato nella sua eredità multiforme basata sulle scuole, sui maestri e sui libri, nella conferenza della prof.ssa Antonella

⁴ I Conversaciones Pedagógica de Salamanca. *La Pedagogía en España y el Espacio Europeo de Educación Superior* (Salamanca, 27-29 ottobre 2005).

⁵ II Conversaciones Pedagógicas de Salamanca – Congreso Internacional Iberoamericano. *Influencias europeas en la pedagogía española contemporánea. De la Junta para la Ampliación de Estudios a la construcción del Espacio Europeo de Educación Superior 1907-2007* (Salamanca, 24-27 ottobre 2007), <http://www.helmanticapaideia.com/wp/?page_id=178> (ultimo accesso: 30 settembre, 2014).

⁶ III Conversaciones Pedagógicas de Salamanca - Congreso Internacional Iberoamericano. *Influencias francesas en la educación española e iberoamericana 1808-2008* (Salamanca, 15-18 ottobre 2008), <http://www.helmanticapaideia.com/wp/?page_id=180> (ultimo accesso: 30 settembre, 2014).

⁷ IV Conversaciones Pedagógicas de Salamanca - Congreso Internacional Iberoamericano. *Influencias alemanas en la educación española e iberoamericana 1809-2009* (Salamanca, 15-17 ottobre 2009), <http://www.helmanticapaideia.com/wp/?page_id=182> (ultimo accesso: 30 settembre, 2014).

⁸ V Conversaciones Pedagógicas de Salamanca - Congreso Internacional Iberoamericano. *Influencias inglesas en la educación española e iberoamericana 1811-2011* (Salamanca, 22-24 settembre 2011), <http://www.helmanticapaideia.com/wp/?page_id=56> (ultimo accesso: 30 settembre, 2014).

⁹ VI Conversaciones Pedagógicas de Salamanca - Congreso Internacional Iberoamericano. *Influencias italianas en la Educación Española e Iberoamericana (5-7 giugno 2014)*, <http://helmanticapaideia.com/cp/?page_id=10> (ultimo accesso: 30 settembre, 2014).

Cagnolati (Università di Foggia), dal titolo *El legado del humanismo italiano: los maestros, las escuelas y los libros*, a cui ha fatto seguito la ricognizione sulla fama della pedagogia di Don Bosco in Brasile, ampiamente studiata dal professor Wenceslao Gonçalves Nieto (Università Federale di Minas Gerais) nella sua analisi dal titolo *A pedagogia de Don Bosco in Brasil*.

Il convegno si è successivamente declinato nelle sessioni dedicate alla influenza italiana sia sul sistema scolastico della Spagna contemporanea che sulla educazione popolare. Le due sessioni, variamente articolate al loro interno, sono parse le più numerose per la folta partecipazione e la varietà dei temi trattati che hanno spaziato dall'importante attività dei salesiani in Spagna, alla diffusione del libro *Cuore*, dalla presenza delle teorie montessoriane nei manuali di pedagogia e di storia dell'educazione alle riviste espressamente dedicate alla formazione degli insegnanti che trattavano temi derivati dalla cultura pedagogica italiana.

Nella seconda giornata le affascinanti conferenze d'apertura hanno illuminato i personaggi forse più noti nel panorama pedagogico italiano del Novecento: Maria Montessori e Don Milani. La prof.ssa Carmen Sanchidrián (Università di Malaga) ha presentato, nella conferenza *El método Montessori en la educación infantil española: luces y sombras*, un ritratto a tutto tondo della grande Montessori, ponendo in luce i suoi molteplici – seppur controversi – rapporti con la Spagna e la sua eredità in termini di fondazione di scuole che hanno adottato il suo metodo, nonché i percorsi di formazione per le maestre montessoriane. La straordinaria figura di Don Milani è stata oggetto della conferenza *La pedagogía di Don Milani en España* a cura di José Luis Corzo Toral, fondatore del «Movimiento de Educadores Milanianos» e principale diffusore delle sue teorie in Spagna, nell'ambito della pedagogia sociale. Di notevole rilievo sono state le tre sessioni della giornata dedicate all'influenza italiana in Africa, in America del Sud e in Portogallo, in cui temi coinvolgenti sono stati portati all'attenzione e resi oggetto di discussione come, per esempio, le emergenze educative in Brasile e Argentina all'inizio del secolo XX causate dalla forte ondata migratoria dall'Italia, la necessità di fondare scuole professionali sul modello salesiano in Africa, l'attenzione in Portogallo verso il modello delle scuole d'infanzia fondate da Loris Malaguzzi.

Il convegno si è chiuso dal punto di vista scientifico con la conferenza *Italia en los manuales de Historia de la Educación para maestros en España (1882-1975)* del prof. Hernández Díaz che ha presentato i risultati del suo progetto di ricerca sui manuali di Storia dell'Educazione allo scopo di verificare la presenza dell'Italia, sia sotto il profilo pedagogico che per quanto concerne le figure più significative. Non poteva ovviamente mancare una giornata dedicata all'approfondimento storico 'sul campo'; ovvero la visita ai luoghi della tradizione educativa e scolastica della città di Salamanca, che ospita una delle università più antiche d'Europa: pertanto nella giornata del 7 giugno i convegnisti hanno potuto fruire di un percorso turistico-culturale le cui tappe

sono state la Biblioteca Storica dell'Università di Salamanca, gli edifici delle *Escuelas Mayores y Menores* e il famoso *Cielo*.

3. *Valore ed eterogeneità dell'influenza*

Possiamo a buon diritto domandarci cosa si intenda realmente con il termine 'influenza'. Nella raffinata comunicazione d'apertura che ha inaugurato i lavori del convegno, il prof. Hernández Díaz ha opportunamente sottolineato il valore delle teorie pedagogiche e delle pratiche educative che l'Italia ha profuso a piene mani nel mondo, a partire dalla classicità latina fino al secolo XX. Una lunga durata che ben contraddistingue la dinamicità del pensiero pedagogico italiano, pur nelle alterne vicissitudini storiche che, seppur talvolta contrassegnate da crisi e regressi, non hanno mai inficiato il valore universale della cultura e della feconda eredità che l'Italia ha donato e continua a donare al mondo intero. Ben più dunque di una semplice contaminazione di stili educativi, l'influenza può rivelarsi come un fattore altamente positivo allorquando viene ad innervare una tradizione ritenuta ormai obsoleta e consuetudinaria, non più in grado di dare fermenti attivi alla società: dunque una corrente di pensiero, una pratica didattica, un input di tipo metodologico vanno a rappresentare una linfa vitale per la cultura che li accoglie, li fa propri e feconda con semi nuovi e rivoluzionari un terreno ormai esausto che necessita di buone prassi pedagogiche.

Non vi è dubbio alcuno che le influenze possano presentarsi sotto le mentite spoglie di suadente propaganda quando, in periodi storici particolarmente nefasti, la formazione delle giovani generazioni assume una rilevanza strategica per l'obnubilamento delle coscienze, tramite la messa in atto di strategie cariche di pervasiva efficacia volte all'indottrinamento delle menti e dei cuori con la conseguente privazione di ogni capacità critica.

Compare un diverso tipo di influenza quando la *paideia*, nata e sviluppatasi in un particolare territorio, viene altresì filtrata e trasformata in un modello diverso il quale si innerva nella tradizione preesistente: tale pare la casistica più frequente nella storia della pedagogia, in quanto ogni linea di pensiero, ogni pur granitica teoria si fluidifica e rinasce come *altro* allorquando si mescola al contesto sociale, educativo e – perché no, economico – di un paese. Possiamo quindi parlare di osmosi, dacché le risultanze finali si fanno 'nuova teoria', nonché motivano e legittimano prassi divergenti rispetto alle istanze originali derivanti dall'estero. L'accoglienza in un ambito differente rispetto alla creazione originaria fa sì che le idee subiscano un processo di metamorfosi e vengano messe proficuamente in circolo al fine di produrre nuove riflessioni, con l'indiscutibile ed utopistica finalità di pensare al progresso e all'avanzamento della società intera.

Vediamo dunque nello specifico quali possono dirsi le tipologie di influenze e contaminazioni se analizziamo il caso della relazione unidirezionale tra Italia e Spagna, tra Italia e Portogallo, nonché tra Italia e America latina: a fronte delle numerose comunicazioni presentate nel convegno, mi pare opportuno stilare un sintetico elenco. In primo luogo, vi sono le risultanze ideali delle correnti pedagogiche italiane: si tratta di un influsso generale le cui basi vengono eterogeneamente declinate quando vanno ad incontrarsi con un contesto in cui le dinamiche educative presenti paiono ormai al tramonto e dunque necessitano di nuova linfa. Senza tema di smentite, possiamo affermare che tale pare il caso dell'attivismo pedagogico nella sua forte ipostatizzazione montessoriana, ben più che deweyana: il pensiero di Maria Montessori si accampa nella pedagogia spagnola del Novecento con un carisma indiscutibile e con la potenza innovativa della sua rivoluzionaria metodologia didattica, seppur rivisitata attraverso ottiche non sempre fedeli ai fondamenti speculativi della grande pedagogista.

Decisamente più forte si manifesta la celebrazione di singoli autori (sia sotto il profilo teorico che pragmatico) e di specifiche figure spesso assai più conosciute all'estero che non Italia, per avvalorare il detto *nemo profeta in patria*: tale il caso di Emma Castelnuovo, brillante eroina della matematica moderna, le cui numerose pubblicazioni godono di fama indiscussa nella didattica di tale disciplina nei vari paesi dell'America latina che ella ebbe modo di visitare e dove fu spesso invitata come conferenziera.

Altrettanto foriera di profondi mutamenti può considerarsi l'influenza dei metodi che, una volta assimilati e padroneggiati con sufficiente abilità e maestria, hanno il pregio di rivoluzionare la quotidianità educativa fatta di docenti e discenti, di strategie da applicare e di competenze da acquisire. La vera innovazione passa attraverso una decisa soluzione di continuità nelle modalità di fare scuola, vivere nelle aule, mutare obiettivi e, di conseguenza, gli strumenti di lavoro. Il pregio sta nel diffondere metodi radicali nell'ambito extrascolastico: così si delinea a chiare lettere il grande mutamento operato da Don Bosco e da Don Milani, entrambi tesi al recupero dei giovani, degli emarginati, dei più deboli.

Un quadro a forti tinte viene dipinto attraverso l'analisi serrata di alcune situazioni che provocano un impatto decisivo sulle modalità operative: in questo caso, l'emigrazione italiana in America latina determina problematiche inusitate alle quali è necessario far fronte intrattenendo così una relazione di mutuo rispetto e di fragile compromesso fra le scuole statali e le istituzioni scolastiche riservate agli immigrati, non senza difficoltà ed incomprensioni, come si può ben immaginare.

Infine, non possiamo certamente dimenticare la portata della diffusione registrata da alcuni libri, su tutti il mirabile *Cuore* di Edmondo De Amicis che diventa anche nel mondo iberico una sorta di manuale di lettura e viene introdotto in maniera obbligatoria nei programmi scolastici. Questa inclusione rende i personaggi delle storie narrate familiari e conosciuti, tanto da rappresentare

dei veri modelli identitari per i piccoli alunni che ascoltavano dalla viva voce del maestro storie di abnegazione e miseria, di eroismo e di riscatto nelle quali erano coinvolti i giovani protagonisti.

4. *Fra luci e ombre: le criticità*

Un convegno di tale ampio respiro permette a coloro che si occupano di Storia dell'educazione in Italia di elaborare un bilancio sull'ampiezza delle ricadute delle teorie pedagogiche, nonché sulla fama di cui alcuni personaggi hanno goduto ed ancora continuano a godere all'estero. Non vi è alcun dubbio che si siano creati nel tempo delle linee ormai consolidate di studio e ricerca, come è parso evidente ascoltando le numerose comunicazioni presentate.

Veniamo allora a sottolineare le luci: in primo luogo, si staglia gigantesca, pur con notevoli distinguo, la notorietà di una figura di indiscusso valore pedagogico come Maria Montessori, sempre presente nelle varie sessioni del convegno, segno che ancora la sua teoria affascina, incuriosisce, è oggetto di studio e pubblicazioni. È certamente una Montessori 'diversa', vuoi per la mancanza di traduzioni valide, con un apparato critico rilevante, vuoi perché le sue idee si sono riplasmate a contatto con la cultura spagnola.

Don Bosco rappresenta un punto fermo della pedagogia sociale, nello specifico in America latina, in territori che si trovano alle prese con una devastante povertà educativa e con l'esigenza di recuperare masse di giovani adolescenti e dar loro una base etica e formativa. Numerose comunicazioni hanno enfatizzato il ruolo pragmatico dell'educazione e quanto sia presente in maniera capillare nelle zone più povere del Brasile e dell'Argentina attraverso l'esperienza dei *talleres*.

Un'effervescente curiosità circonda il prete di Barbiana, una figura ancora da esplorare che sta diventando sempre più serio oggetto di studio da parte sia degli storici dell'educazione che dei pedagogisti sociali. Possiamo dunque affermare che non manca l'interesse verso singole figure recepite come grandi innovatori, teorici e pratici insieme, dotati di acume e carisma, nonché dinamici per fondare istituzioni e scuole dove venivano adottati i loro metodi.

È doveroso fare una profonda riflessione che riguarda il mondo accademico spagnolo e italiano: se una prima critica si deve avanzare, è relativa alla scarsa diffusione di traduzioni affidabili delle opere di questi pedagogisti, nonché al deficit di letteratura scientifica italiana che non viene tradotta in altre lingue in modo da poter essere diffusa a largo raggio. In secondo luogo, interi periodi della storia delle pedagogie mancano del tutto: gli autori minori dell'Umanesimo e del Rinascimento non sono conosciuti e tradotti, così come dal punto di vista delle epoche storiche si vede chiaramente un appiattimento sulle seconda metà

dell'Ottocento e il Novecento, senza considerare la fondamentale elaborazione di teorie in Italia durante l'Illuminismo e il Romanticismo.

Pare opportuno iniziare un lavoro denso di diffusione della intera storia dell'educazione italiana al fine di non ritenere che esistano solo alcuni teorici e che costoro rappresentino l'eshaustività di ciò che è stato prodotto nei secoli nella cultura e nella società italiana. Lo stimolo offerto da un convegno come quello celebrato a Salamanca risulta di enorme utilità per comprendere come l'Italia viene pensata, immaginata e studiata in una terra come la Spagna così vicina a noi per legami, per tradizioni e per storia comune.

*International
Bibliography*



**Bibliografia
Internazionale**

International Bibliography of the History of Education and Children's Literature (2013)

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Introduction

The present *International Bibliography* about the history of education and children's literature for the year 2013 follows the one appeared on «History of Education & Children's Literature» last year and concerning the three years period 2010-2012. Just like that, it is a specialized bibliographical overview (articles published in journals, monographs, collections of essays, proceedings and textbooks) concerning the research and the studies about the history of education published all over the world.

In order to create such a work tool, addressed in particular to the scholars of history of education and children's literature, it is appropriate to systematically analyze the Publishers' catalogues of hundreds of national and international specialized publishing houses (historical studies, social and human sciences, educational sciences), as well as the catalogues of about 400 scientific journals belonging to the same field or related to it, published in different countries of the world.

This kind of research is necessarily a *work in progress*, due to the sometimes insuperable difficulties connected to the understandable will of completeness and exhaustiveness in the process of data retrieval. Despite the growing support

to globalization given by *internet* and the *social media*, in fact, the *web sites* of the publisher houses and scientific reviews (as well as those of the Universities and of the public and private research Centres) not always provide updated and exhaustive information (catalogues, bibliographical report, tables of contents of the issues etc.).

Hence, the sometimes insurmountable difficulties encountered in the process of acquisition of precise data and reliable information about the scientific production in this field in some particular countries and, consequently, the real need for a network of partners operating *in loco*, i.e. a network of researchers and scholars specialized in this field, who agreed to report systematically to «History of Education & Children's Literature» the most recent and relevant publications occurred in their own country and, if necessary, to complete the sometimes fragmentary information obtained through internet.

Over the last year, a great amount of energy has been spent in the creation and enhancement of such a network of partners, in order to make this bibliography a reliable, constantly updated tool, enjoyable by all scholars and, above all, able to present in all its complexity and variety the wide-ranging international scientific production in the field of history of education and children's literature.

In addition to the colleagues of «History of Education & Children's Literature», a number of experts and researchers from all over the world contributed to the creation of this *International Bibliography* concerning the year 2013. In this regard, the editors would like to sincerely thank for their collaboration: *Vitaly G. Bezrogov* (Russian Academy of Education, Moscow, Russia), *Ariane Calderari* (Centre de Documentation et de Recherche Pestalozzi d'Yverdon, France), *Craig Campbell* (University of Sydney, Australia), *Peter Carrier* (Redaction of the review «Journal of Educational Media, Memory and Society», Germany), *Antonio Castillo Gómez* (Universidad de Alcalá, Spain), *Anne-Marie Chartier* and *Renaud D'Enfert* (INRP – Service d'Histoire de l'Éducation, France), *Maria Elena Del Valle de Villalba* (Universidad Metropolitana, Caracas Venezuela), *Inés Dussel* (Facultad Latinoamericana de Ciencias Sociales, Argentina), *Agustín Escolano Benito* (Universidad de Valladolid, Centro Internacional de la Cultura Escolar, Spain), *Aslam Fataar* (Stellenbosch University, South Africa), *Décio Gatti* (Faculdade de Educação, Universidade Federal de Uberlândia, Brazil), *Hui Haifeng* (Huazhong University of Science and Technology, Wuhan, China), *Margot Hillel* (Australian Catholic University, Australia), *Rebekka Horlacher* (redaction of the review «Bildungsgeschichte. International Journal for the Historiography of Education», Switzerland), *Esmeralda Hoti* (Faculty Education/Department of Psychology, University of «Aleksander Moisiu», Durres, Albania), *Peter Kallaway* (University of Cape Town, South Africa), *Alexander Karp* (Columbia University), *Iveta Kestere* (University of Latvia), *Grigorij Kornetov* (Academy of the Social Administration, Moscow, Russia), *Javier Laspalas* (Universidad de Navarra, Spain), *Hugh Morrison* (University of Otago, New Zealand), *Gabriela Ossenbach Sauter* (UNED, Spain), *Paraskevi*

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Abbreviations and Acronyms

- ACEX = «Academic Exploration» (China)
 ACTAC = «Acta Academiae Beregsasiensis» (Hungary)
 ADIF = «Annali online della didattica e della formazione docente» (Italy)
 AEHJ = «American Educational History Journal» (USA)
 AHEA = «Historia de la Educación Argentina. Anuario» (Argentina)
 ALMAM= «Alma Mater. Vestnik vysshej shkoly» (Russia)
 ANDO = «Anthology of Dongyue» (China)
 ANLI = «Anhui Literature» (China)
 AOB = «Administrator Obrazovanya» (Russia)
 APMA = Appreciation of Masterpieces» (China)
 APOP = «Aktual'nye Problemy Obshego i Professional'nogo Obrazovanya» (Russia)
 ASE = «Annali di Storia dell'Educazione e delle Istituzioni scolastiche» (Italy)
 ASESOA = «Assessment of Southeastern Asia» (China)
 ASNSP = «Annali della Scuola Normale Superiore di Pisa. Classe di Lettere e Filosofia» (Italy)
 ASUI = «Annali di Storia delle Università Italiane» (Italy)
 AURP = «Aula. Revista de Pedagogía de la Universidad de Salamanca» (Spain)
 BASMC = «Bollettino dell'Archivio per la storia del movimento sociale cattolico in Italia» (Italy)

- BCP = «Le Bulletin du Centre de documentation et de recherche Pestalozzi» (Switzerland)
- BERJ = «British Educational Research Journal» (United Kingdom)
- BHR = «Bibliothèque d'Humanisme et Renaissance» (France)
- BIS = «Biologiya v Shkole» (Russia)
- BJES = «Baltic Journal of European Studies» (Latvia)
- BJPS = «British Journal of Political Science» (Great Britain)
- BORP = «Bordón. Revista de Pedagogía» (Spain)
- BPHM = «Bulletin der Polnischen Historischen Mission» (Germany)
- BSSE = «Buletini Shkencor. Shkencat e Edukimit» (Albania)
- BSSV = «Bollettino della Società degli Studi Valdesi» (Italy)
- BSZO = «B'lgarsko spisanie za obrazovanie» (Bulgaria)
- CAE = «Carrefours de l'Éducation» (France)
- CBMH = «Canadian Bulletin of Medical History» (Canada)
- CEIS = «Cennostii. Smyсли» (Russia)
- CES = «Cultura Escrita & Sociedad» (Spain)
- CHE = «Cadernos de História da Educação» (Brazil)
- CHEBRO = «Chelovek i obrazovanie» (Russia)
- CHIBO = «China Book Review» (China)
- CHINPI = «China Newspaper Industry» (China)
- CHIPRE = «China Press» (China)
- CHIT = «Chinese Teaching» (China)
- CHR = «The Catholic Historical Review» (USA)
- CHSCC = «Church History: Studies in Christianity and Culture» (UK)
- CIAN = «CIAN. Revista de Historia de las Universidades» (Spain)
- CJES = «Cypriot Journal of Educational Sciences» (Cyprus)
- COED = «Contemporary Education Dialogue» (India)
- CON = «Contemporanea. Rivista di Storia dell'800 e del '900» (Italy)
- CONCHI = «Construction of Chinese Course» (China)
- CONFOLI = «Contemporary Foreign Literature» (China)
- CP = «Cuestiones Pedagógicas. Revista de Ciencias de la educación» (Spain)
- DEBA = «Debates in Arts» (China)
- DEF = «Defektologiya» (Russia)
- DL = «DorLedor. Studies in the History of Jewish Education in Israel and the Diaspora» (Israel)
- DNV = «Dukhovno-Nravstvennoe Vospitanie» (Russia)
- DO = «Docencia» (Chile)
- DOS = «Doshkolnik» (Russia)
- DOSBRAV = «Doshkol'noe obrazovanie i vospitanie» (Russia)
- DOV = «Doshkolnoe Vospitanie» (Russia)
- DPRS = «Dimensioni e problemi della ricerca storica» (Italy)
- DSA = «Detsky Sad ot A do Ya» (Russia)
- DSS = «Direktor Sel'skoj Shkoly» (Russia)

- EASF = «Eastern Forum» (China)
 ECOPOL = «Economic and Political Weekly» (India)
 ED = «Educación XX1» (Spain)
 EDC = «Education» (Hungary)
 EDI = «Educazione interculturale» (Italy)
 EDSCI = «Education Science» (Greece)
 EDU = «Educação» (Brazil)
 EDUR = «Educar em Revista» (Brazil)
 EERE = «Elementary Education Research» (China)
 EERJ = «European Educational Research Journal» (United Kingdom)
 EFIL = «Educação e Filosofia» (Brazil)
 EFP = «El Futuro del Pasado» (Spain)
 EH = «Educació i Història. Revista d'Història de l'Educació» (Spain)
 EI = «Education Inquiry» (Sweden)
 EJE = «European Journal of Education» (USA)
 EKO = «Ekologicheskoe Obrazovanie: do Shkoly, v Shkole, vne Shkoly» (Russia)
 EKS = «Ekonomika v Shkole» (Russia)
 EMSTT = «Elementary and Middle School Teacher Training» (China)
 EOZ = «Evrazyskoe Ozherel'e» (Russia)
 ES = «Educational Studies. A Journal of the American Educational Studies Association» (United Kingdom)
 ESE = «ESE. Estudios Sobre Educación» (Spain)
 ETE = «Espacio, Tiempo y Educacion» (Spain)
 EUROCLIO = «EUROCLIO Bulletin» (Greece)
 EXE = «Exedra. Revista Científica (on line)» (Portugal)
 EXPLO = «Exploration of Education» (China)
 FE = «Foro de Educación» (Spain)
 FEMSE = «Foreign Elementary and Middle School Education» (China)
 FILOBRA = «Filosofya obrazovanya» (Russia)
 FILOL = «Filologos» (Greece)
 FIS = «Fizika v Shkole» (Russia)
 FKVT = «Fizicheskaya Kul'tura: Vospitanie, Obrazovanie, Trenirovka» (Russia)
 FOB = «Filosofya Obrazovanya» (Russia)
 FOLFOLT = «Foreign Language and Foreign Language Teaching» (China)
 FOLST = «Foreign Language Studies» (China)
 FORDUL = «Fordulópont» (Hungary)
 FOREC = «Forum of Education and Culture» (China)
 FORER = «Forum of Education and Research» (China)
 FORET = «Forum of Education and Teaching» (China)
 FORME = «Forum of Modern Education» (China)
 FORT = «Forum of Teaching» (China)
 FORWOC = «Forum of World Chinese Literature» (China)
 GEES = «Geografya i Ekologya v Shkole XXI Veka» (Russia)

- GES = «Geografya v Shkole» (Russia)
- GODUZ = «Godishnik na Universitet “Prof. Dr. Asen Zlatarov”» (Bulgaria)
- GSU = «Godishnik na Sofijski Universitet “St. Kliment Ohridski”» (Bulgaria)
- GUISS = «Guizhou Social Science» (China)
- GWU = «Geschichte in Wissenschaft und Unterricht» (Germany)
- GYER = «Gyermeknevelés» (Hungary)
- HE = «Histoire de l'Éducation» (France)
- HECL = «History of Education & Children's Literature» (Italy)
- HEILED = «Heilongjiang Education» (China)
- HEILSCI = «Heilongjiang Sci-Tech Info» (China)
- HEJ = «History of Education. Journal of the History of Education Society» (United Kingdom)
- HEMM = «Hautes Études Médiévales et Modernes» (France)
- HEQ = «History of Education Quarterly» (USA)
- HER = «History of Education Review. The official Journal of the Australian & New Zealand History of Education Society» (Australia)
- HERI = «Historia de la Educación. Revista Interuniversitaria» (Spain)
- HES = «Higher Education Studies» (Canada)
- HF = «The History of the Family. An International Quarterly» (Ireland)
- HISTI = «History of education issues» (Greece)
- HME = «Historia y memoria de la educación» (Spain)
- HP = «History of Psychiatry» (California-Usa)
- HSE = «Historical Studies in Education/Revue d'Histoire de l'Éducation» (Canada)
- HU = «History of Universities» (United Kingdom)
- IC = «Italia Contemporanea» (Italy)
- IJED = «International Journal of Educational Development» (Hong Kong, China)
- IJHE = «Bildungsgeschichte. International Journal for the Historiography of Education» (Switzerland)
- IJHME = «International Journal for the History of Mathematics Education» (USA)
- IN = «Infanzia» (Italy)
- INJS = «Inostrannye Yazyki v Shkole» (Russia)
- INNOB = «Innovacii v obrazovanii» (Russia)
- INT = «Intellect» (China)
- INTEP = «International and European Politics» (Greece)
- IOL = «Innovacii v Obrazovanii i Lingvistike» (Russia)
- IPAV = «Istoriko-Pedagogichesky Almanakh VLADI» (Russia)
- IPZ = «Istoriko-Pedagogichesky Zhurnal» (Russia)
- IRAO = «Izvestya Rossyskoj Akademii Obrazovanya» (Russia)
- IRCL = «International Research in Children's Literature» (Canada)
- IRGPU = «Izvestya Rossyskogo Gosudarstvennogo Pedagogicheskogo Universiteta im. A.I. Gercena» (Russia)

- IRHED = «International Review of History Education» (Greece)
ISBRA = «Iskusstvo i obrazovanie» (Russia)
ISK = «Iskolakultura Könyvek» (Hungary)
ISPESE = «Istorya pedagogiki segodnya» (Russia)
ISSRA = «Issledovatel'skaya rabota shkol'nikov» (Russia)
ISTPE = «Istoriko-pedagogichesky Ezhegodnik» (Russia)
IZYUFED = «Izvestya Yuzhnogo Federal'nogo universiteta: Pedagogicheskie nauki» (Russia)
JEAH = «Journal of Educational Administration & History» (United Kingdom)
JEMMS = «Journal of Educational Media, Memory, and Society» (Germany)
JFH = «Journal of Family History. Studies in Family, Kinship, Gender, and Demography» (Canada)
JHB = «Jahrbuch für Historische Bildungsforschung» (Germany)
JHCY = «Journal of the History of Children and Youth» (USA)
JHE = «The Journal of Higher Education» (USA)
JIANER = «Jiangsu Education Research» (China)
JIANSS = «Jiangxi Social Science» (China)
JOAUT = «Journal of Anhui University of Technology» (China)
JOCHIMU = «Journal of China Marine University» (China)
JOCHU = «Journal of Chengdu University» (China)
JOCHUD = «Journal of China Education» (China)
JOCUT = «Journal of Changchun University of Technology» (China)
JOED = «Journal of Editing» (China)
JOEDU = «Journal of Education» (China)
JOGUCOT = «Journal of Guangdong College of Technology» (China)
JOGUNOS = «Journal of Guilin Normal School» (China)
JOGUPS = «Journal of Guilin Professional School» (China)
JOHABS = «Journal of Hainan Broadcast School» (China)
JOHEUT = «Journal of Henan University of Technology» (China)
JOHUCOT = «Journal of Hunan College of Technology» (China)
JOHUSENS = «Journal of Hubei Second Normal School» (China)
JOINMONU = «Journal of Inner Mongolia Normal University» (China)
JOJCE = «Journal of Jilin College of Education» (China)
JOJUN = «Journal of Jimei University» (China)
JOKUC = «Journal of Kunming College» (China)
JOLACE = «Journal of Lanzhou College of Education» (China)
JOLINS = «Journal of Liuzhou Normal School» (China)
JOLINU = «Journal of Liaoning Normal University» (China)
JOLUNS = «Journal of Luoyang Normal School» (China)
JOMU = «Journal of Mudanjiang University» (China)
JONNU = «Journal of Nanjing Normal University» (China)
JOPLA = «Journal of PLA Foreign Language School» (China)
JOSE = «Journal of Scientific Education» (China)

- JOSHANU = «Journal of Shanxi Normal University» (China)
JOSIPROS = «Journal of Sichuan Professional School» (China)
JOUBENU = «Journal of Hebei Normal University» (China)
JOUCS = «Journal of Curriculum Studies» (Greece)
JOUHUFINS = «Journal of Hunan First Normal School» (China)
JOUJICOT = «Journal of Jinchu College of Technology» (China)
JOWU = «Journal of Wuhan University» (China)
JOXIBRU = «Journal of Xiamen Broadcast University» (China)
JOXIPS = «Journal of Xiangfan Professional School» (China)
JOYU = «Journal of Yangtze University» (China)
JOZUNS = «Journal of Zunyi Normal School» (China)
JPH = «Journal of Pacific History» (UK)
JPHE = «Journal of Philosophy & History of Education» (USA)
JSE = «The Journal of Special Education» (United Kingdom)
JSSE = «Journal of Social Science of Education» (Germany)
JU = «Jahrbuch für Universitätsgeschichte» (Germany)
KAF = «Kafedra» (Russia)
KAINN = «Kachestvo. Innovacii. Obrazovanie» (Russia)
KEK = «Kultúra és közösség» (Hungary)
KLIO = «Zhurnal dlya uchenykh» (Russia)
KOR = «Korrekcionnaya Pedagogika» (Russia)
KSOP = «Kachestvo Sovremennogo Obrazovanya: Problemy i Putyakh Reshenya» (Russia)
KUOBRA = «Kul'tura, Obrazovanie, Nauka» (Russia)
LBR = «L.I.B.E.R. Libri per Bambini e Ragazzi» (Italy)
LIB = «Libri & Liberi: časopis za istraživanje dječje književnosti i kulture» (Croatia)
LIBS = «Library Science» (China)
LITC = «Literary Circle» (China)
LITED = «Literary Education» (China)
LITS = «Literatura v Shkole» (Russia)
LRE = «London Review of Education» (United Kingdom)
LURA = «Latvijas Universitātes Raksti (Lettland)
LURAPE = «Latvijas Universitātes Raksti. Pedagoģija un skolotāju izglītība» (Lettland)
MAK = «Makarenko» (Russia)
MAS = «Matematika v Shkole» (Russia)
MDS = «Il mestiere di Storico» (Italy)
MEDIAOB = «Mediaobrazovanie» (Russia)
MEMSE = «Modern Elementary and Middle School Education» (China)
MES = «Modern Education Science» (China)
METEP = «Modern Education: Theory and Practice» (China)

- MFB = «Mitteilungsblatt des Förderkreises der Bibliothek für Bildungsgeschichtliche Forschung» (Germany)
- MMP = «Matematika i Metodika ee Prepodavanya» (Russia)
- MNIM = «Mnimon» (Greece)
- MNS = «Medicina nei Secoli» (Italy)
- MOOM = «Mir Obrazovanya – Obrazovanie v Mire» (Russia)
- MOR= «Modern Reading» (China)
- MP = «Magyar Pedagógia» (Hungary)
- MT = «Magyar Tudomány» (Hungary)
- MVDS = «Muttersprache. Vierteljahresschrift für Deutsche Sprache» (Germany)
- NAC = «Nachalnoe Obrazovanie» (Russia)
- NACS = «Nachalnaya Shkola» (Russia)
- NAER = «Journal of New Approaches in Educational Research» (Spain)
- NAR = «Narodnoe Obrazovanie» (Russia)
- NAS = «Nauka i Shkola» (Russia)
- NASP = «Nachalnaya Shkola Plyus Do i Posle» (Russia)
- NASS = «Nanjing Social Science» (China)
- NBC = «Nuovo Bollettino del Centro Italiano per la Ricerca Storico-Educativa» (Italy)
- NE = «Neveléstörténet» (Hungary)
- NEVEOK = «Neveléstudomány: oktatás – kutatás – innováció» (Hungary)
- NEWPA = «New paidéia» (Greece)
- NINSS = «Ningxia Social Science» (China)
- NISO = «Nauchnye Issledovanya v Obrazovanii. Pedagogika. Psikhologiya. Ekonomika» (Russia)
- NJHS = «Nuncius. Journal of the History of Science» (Italy)
- NLOBO = Novoe Literaturnoe obozrenie (Russia)
- NOLIT = «Northern Literature» (China)
- NOVPETE = «Novye pedagogicheskie tekhnologii» (Russia)
- NPPI = «Novoe v Psikhologo-Pedagogicheskikh Issledovanyakh» (Russia)
- NR = «Nauka i Religya» (Russia)
- NS = «Neskuchnyj Sad» (Russia)
- OBED = «Observation of Education» (China)
- OBRA = «Obrazovanie» (Bulgaria)
- OBRA = «Obrazovanie i nauka» (Russia)
- OBRO = «Obrazovanie i Obshchestvo» (Russia)
- OBUCH = «Obuchenie» (Russia)
- ODOSHDE = «O doshkol'nom detstve» (Russia)
- ODP = «Obrazovanie XXI Veka» (Russia)
- ORE = «Oxford Review of Education» (United Kingdom)
- OSS = «Obrazovanie v Sovremennoj Shkole» (Russia)
- OTECH = «Obrazovanie i tekhnologii. Godishno nauchno-metodicheskoe spisanie» (Bulgaria)

- OTS = «Otkrytaya Shkola» (Russia)
OUP = «Obrazovanie v uslovyakh Perekhodana Novye Standarty» (Russia)
OZP = «Otechestvennaya i Zarubezhnaya Pedagogika» (Russia)
PDV = «Prepodavatel XXI Vek» (Russia)
PED = «Pedagogika» (Bulgaria)
PEDG = «Pedagogika» (Russia)
PEDISK = «Pedagogika iskusstva» (Russia)
PEDIZ = «Pedagogicheskie izmerenya» (Russia)
PEED = «People's Education» (China)
PER = «Perspectiva. Revista do Centro de Ciências da Educação» (Brazil)
PH = «Paedagogica Historica» (Netherlands)
PHHE = «Perspectives on the History of Higher Education» (USA)
PNPR = «Pedagogicheskaya Nauka i Praktika – Regionu» (Russia)
POBN = «Pedagogicheskoe Obrazovanie i Nauka» (Russia)
PP = «Pro-Posições» (Brazil)
PPP= «Psikhologo-Pedagogichesky Poisk» (Russia)
PPR = «Pedagogika i Psikhologiya v Rossii: Vchera, Segodnya, Zavtra» (Russia)
PRER = «Preschool Education Research» (China)
PRIMEF = «Primary Education Florina» (Greece)
PRIS = «Prepodavanie Istorii v Shkole» (Russia)
PRISO = «Prepodavanie Istoriii Obshchestvoznanya v Shkole» (Russia)
PRO = «Pravo i Obrazovanie» (Russia)
PROBRA = «Professional'noe obrazovanie: teorya i praktika» (Russia)
PROPO = «Problemy pedagogicheskogo obrazovanya: istorya i sovremennost'»
(Russia)
PROS = «Profilnaya Shkola» (Russia)
PSIKHOL = «Psikhologiya i shkola» (Russia)
PSM = «Pedagogika v Sovremennom Mire» (Russia)
PSO= «Problemy Sovremennogo Obrazovanya» (Russia)
PST = «Portugese Studies» (England)
PTE IGYK = «PTE-Igyk» (Hungary)
PZB = «Pedagocheskyj Zhurnal Bashkortostana» (Russia)
QFIAB= «Quellen und Forschungen aus Italienischen Archiven und Bibliotheken»
(Germany)
QS = «Quaderni Storici» (Italy)
QSUP = «Quaderni per la Storia dell'Università di Padova» (Italy)
QSUT = «Quaderni di Storia dell'Università di Torino» (Italy)
RALO = «Revista de Administração Local» (Portugal)
RBHE = «Revista Brasileira de História de Educação» (Brazil)
RCE = «Revista de Ciencias de la Educación» (Spain)
RDO = «Rozprawy z Dziejow Oswiaty» (Poland)
RECOED = «Revista Contemporânea de Educação» (Brazil)
REDUQ = «Revista Educação em Questão» (Brazil)

- REE = «Revista de Educação» (Brazil)
 REED = «Research of Elementary Education» (China)
 REMOCL = «Research of Modern Chinese Literature» (China)
 REOSET = «Research of Education and Teaching» (China)
 REPD = «Revista Profissão Docente» (Brazil)
 REPMA = «Research of Press Marketing» (China)
 RESCIMO = «Research of Chinese Modern Literature» (China)
 RFP = «Revue Française de Pédagogie» (France)
 RH = «Revista HISTEDBR-On Line» (Brazil)
 RHC = «Revista Historia Caribe» (Colombia)
 RHE = «Revista História da Educação» (Brazil)
 RHEC = «Revista Historia de la Educación Colombiana» (Colombia)
 RHEI = «Revue d'Histoire de l'Enfance Irrégulière. Le Temps de l'Histoire»
 (France)
 RHEL = «Revista Historia de la Educación Latinoamericana» (Colombia)
 RIPE = «Ricerche Pedagogiche» (Italy)
 RIPEDI = «Ricerche di pedagogia e didattica» (Italy)
 RMC = «Roma Moderna e Contemporanea» (Italy)
 RMHE = «Revista Mexicana de Historia de la Educación» (Mexico)
 RN = «Revue du Nord» (France)
 RPED = «Revista Portuguesa de Educação» (Portugal)
 RPH = «Revista Procesos Históricos» (Venezuela)
 RPI = «Reading Primers International – Newsletter» (Germany)
 RSE = «Estudios sobre Educación» (Spain)
 RSI = «Rivista Storica Italiana» (Italy)
 RSR = «Rassegna Storica del Risorgimento» (Italy)
 RTUZI = RTU zinātniskie raksti. Humanitārās un sociālās zinātnes (Letland)
 RUSJA = «Russky yazyk v shkole» (Russia)
 RUSREC = «Russkaya rech'» (Russia)
 SA = «Studime Albanologjike» (Albania)
 SAGHE = «Sarmiento. Anuario Galego de Historia da Educación» (Spain)
 SARE = «Southern African Review of Education» (South Africa)
 SCI-TE = «Sci-Tech Info» (China)
 SCIRS = «Social Compass. International Review of Sociology of Religion»
 (United Kingdom)
 SE = «Studium Educationis» (Italy)
 SELSH = «Sel'skaya shkola» (Russia)
 SHB = «Shkol'naya Biblioteka» (Russia)
 SIBUCH = «Sibirskij uchitel» (Russia)
 SISP = «Sovremennye issledovaniya social'nykh problem (elektronnyj nauchnyj
 zhurnal» (Russia)
 SOB = «Sociologya Obrazovanya» (Russia)
 SOCIOBRA = «Sociologya obrazovanya» (Russia)

- SONP = «Strategii na Obrazovatel'nata i Nauchnata Politika» (Bulgaria)
SOTLI = «Southern Literature» (China)
SOVRO = «Sovremennaya shkola Rossii. Voprosy modernizacii» (Russia)
SP = «Sodobna Pedagogika. Journal of Contemporary Educational Studies» (Slovenia)
SPR = «Social'naya Pedagogika v Rossii» (Russia)
SREPRO = «Srednee professional'noe obrazovanie» (Russia)
SS = «Studi Storici» (Italy)
STE = «Shkol'nye Tekhnologii» (Russia)
STIP = «Stranicy Istorii Pedagogiki» (Russia)
SUAN = «Sumadijski anali» (Latvia)
TAG = «Tagad»
TEAMA = «Teaching and Management» (China)
TEOPRA = «Teorya i praktika obuchenya i vospitanya» (Russia)
THEC = «Theory and Creation» (China)
TLJA = Theodor-Litt-Jahrbuch (Germany)
TRUS = «Truth Seeking» (China)
TT = «Teachers and Teaching» (United Kingdom)
UCHIT = «Uchitel'» (Russia)
UDD = «Uddannelseshistorie (Danemark)
UDOU = «Upravlenie Doshkol'nym Obrazovatel'nym Uchrezhdeniem» (Russia)
UNICH = «Universitetskie Chtenya» (Russia)
UPRASO = «Upravlenie sovremennoj shkoly» (Russia)
US-CHI = «US-China Education Review» (United States)
UZKU = «Uchenye Zapiski Kazanskogo Universiteta. Serya Gumanitarnyj Nauki» (Russia)
VDOU = «Vospitatel' Doshol'nogo Obrazovatel'nogo Uchrezhdeniya» (Russia)
VESGE = «Vestnik Gercenovskogo universiteta» (Russia)
VESTU = «Vestnik Universiteta Rossijskoj akademii obrazovanya» (Russia)
VKTU = «Vestnik Kazanskogo tekhnologicheskogo universiteta» (Russia)
VMGGU = «Vestnik Moskovskogo Gosudarstvennogo Gumanitarnogo Universiteta im. M.A. Sholokhova» (Russia)
VMGPU = «Vestnik Moskovskogo Gorodskogo Pedagogicheskogo Universiteta. Serya Pedagogika i Psikhologiya» (Russia)
VMUPO = «Vestnik Moskovskogo Universiteta. Pedagogicheskoe Obrazovanie»
VNES = «Vneshkol'nik» (Russia)
VOB = «Voprosy Obrazovanya» (Russia)
VOF = «Voprosy filosofii» (Russia)
VOGPU = «Vestnik Orenburgskogo Gosudarstvennogo Pedagogicheskogo Universiteta» (Russia)
VOR = «Vysshe Obrazovanie v Rossii» (Russia)
VORS = «Vysshee obrazovanie segodnya» (Russia)
VOSPIMLA = «Vospitanie i obuchenie detej mladshego vozrasta» (Russia)

- VOSS = «Vospitanie v Shkole» (Russia)
 VOSSHKO = «Vospitanie shkolnikov» (Russia)
 VSO = «Voprosy sovremennogo obrazovanya» (Russia)
 VVS = «Vestnik Vysshej Shkoly» (Russia)
 YD = «Yearbook. International Society for History Didactics» (Germany)
 YIL = «Yilin» (China)
 ZHP = «Zeitschrift für Heilpädagogik» (Germany)
 ZNS = «Zavuch Nachal'noj Shkoly» (Russia)
 ZP = «Zeitschrift für Pädagogik» (Germany)

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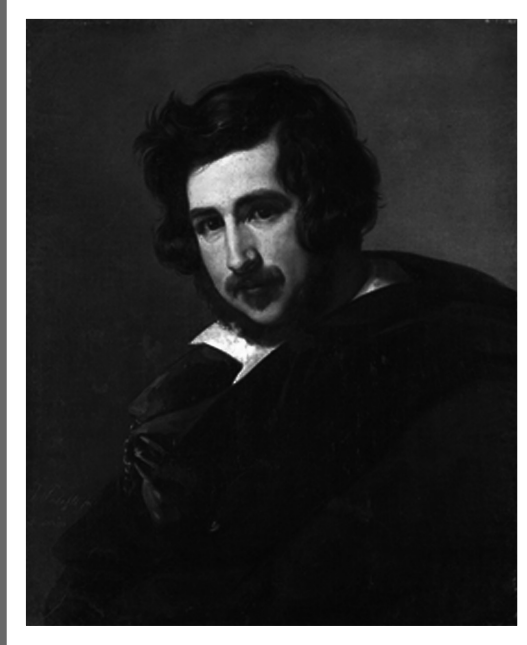
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8

